TWIST Training Manual
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February 15, 2022

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Job Aids

Chapter: Introduction
Section 1: Introduction
Lesson: How To Use This Manual

Objectives:

Upon completion of this lesson the user will be able to:
- understand how each lesson is laid out, including Objectives, Policies, Overview, Tips & Shortcuts, Practice Activities, Skill Checks;
- locate needed information in a specific Chapter, Section and Lesson;
- use the “Table of Contents.”

Overview:

This manual is yours to keep, so make it your own by making notes in margins, highlighting important sections, or putting sticky notes on most used lessons. Don’t be shy, this manual is your best friend and travel companion on your way through TWIST. The information in this manual is your backup in case you forget how to complete a task in this new TWIST environment. Therefore, you need to understand how the information is organized so that you can quickly locate information you need to do your job efficiently.

Each lesson will start with the chapter, section and lesson title as seen above. Listed next will be objectives that will tell you what is to be covered in that particular lesson. WIC policies that impact actions described in the lesson will be listed with their Oregon WIC Policy and Procedure Manual number and symbol. Then you will have a summary of what you will find in the lesson in the “Overview.”

After these introductory portions of each lesson, you will find the instruction divided by gray bars into useable sections. Below, you will find an explanation of the information that is found in each section of the lesson.

Instruction:

Starting point for this section is:

Module name ± Window name ± Screen name

1. **Numbered action steps will tell you exactly what to do, step-by-step.**

- Bullets under numbered steps give you more specific information about the options or fields related to each action.

+ Note: This symbol tells you that there is something you need to know at this point in the instruction. Notes may make a difference about what you choose to do.

Example: Examples will look like this and are just to let you see what happens in a given situation.

☺ **Job Aids with more information will be noted with this box.**

Table of Contents and Page Numbering:

Since there is no index available we have tried to make the Table of Contents and the chapter and lesson titles as descriptive of their contents as possible. So to find what you need, start by looking in the Table of Contents.

The manual is organized by TWIST functionality similar to the modules you find in TWIST. Major areas of functionality will have their own chapter. Each chapter is further divided into sections, and then finally into individual lessons. The pagination for the TWIST Training Manual is very similar to that found in the Oregon WIC Program Policy and Procedure Manual, where the page numbers give you a clue about what the lesson is about. Page numbers are found on the bottom center of every page.

The hierarchy for page numbering looks like this:
- Chapters 1-10
- Sections - 1st digit after chapter number indicates Section number
- Lesson - next 2 digits indicates Lesson number
- Page numbers - follows after decimal point

Example: "Ch 4, 501.5" would be read - Chapter 4, Section 5, Lesson 1 on Page 5. So this page number would tell you that you are in Chapter 4: Appointment Scheduler, Section 5: Scheduling Appointments, Lesson 1: Group Scheduling, Page 5.

✂ *Tips and Shortcuts:*

After the Instruction section of every lesson you will find a short section with some tidbits of information that you might find useful, but that didn't quite make sense to put in the middle of the numbered action steps. Read them and you might find just what you needed to know!

➥ *Practice Activities:*

At the end of each section of instruction are the practice activities. These activities give you a chance to practice what you just learned about in the lesson. These may be especially useful for new staff, staff that were not able to attend training, or for learning information in lessons that we were unable to cover in training. The abbreviated step-by-step style of the practice activity also make a good quick review if needed.

✓ *Skill Checks:*

At the end of each lesson is a situational activity that will let you check whether you feel comfortable using the functionality discussed in the lesson. The skill check doesn't give you the steps, but gives you the context of a situation where you might use the functionality in clinic type situation. You get to try and figure out how to use TWIST to handle the situation. Need help? Browse through the instruction or the practice activities again.

For instance, you can't remember how to make a referral for a client. Where would you look?

Or there might be some questions to think about, like....
Go to the table of contents and find the following information:
What is the title for Chapter 6? ____________________
*What is Chapter 6, Section 4?*_________________
What is Lesson 1 of Chapter 6? _____________

✍ *Notes:*

At the end of every lesson is a notes area for you to write any specific thoughts or ideas you have about the information in the lesson. Remember, the manual is yours, so write anywhere, anything that will make it a more useful tool for you.

Chapter 1: TWIST Overview
Section 1: Introduction to TWIST and TWIST Security
Lesson: Introduction to TWIST and TWIST Security

Objectives:

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

- successfully navigate through the TWIST system;
- explain how TWIST communicates with the State WIC office;
- log on TWIST utilizing appropriate passwords;
- demonstrate logging off the system at the appropriate times; and
- identify how and when data from TWIST may be shared.

Oregon Policies:

- ♦ 450 Confidentiality
- ♦ 900 Data System Introduction
- ♦ 901 Data System Security

Overview:

Welcome to the world of TWIST!

TWIST is the name of the Oregon WIC Program data system. TWIST stands for "**T**he **W**IC **I**nformation **S**ystem **T**racker."

Today is the day you will learn about Oregon's unique user-friendly WIC computer program. We will begin by explaining how to access the system and move from one area to another.

Instruction:

Logging On to TWIST

1. **Turn on your computer and log on to your agency's network.**

    - Not all computers turn on the same way, but usually you have to turn on the monitor and then the computer.
    - At your agency you will have to log on to your agency's network before you can log on to TWIST.

2. **Double click on the "FamilyNet" web access icon.**

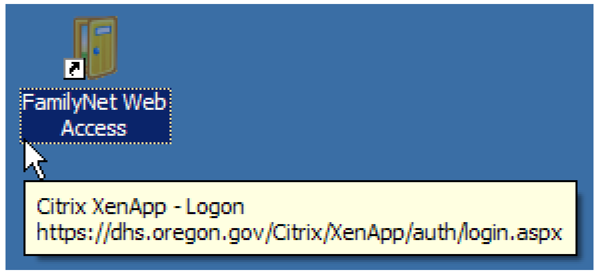


Figure 1: "Family Net Web Access" icon

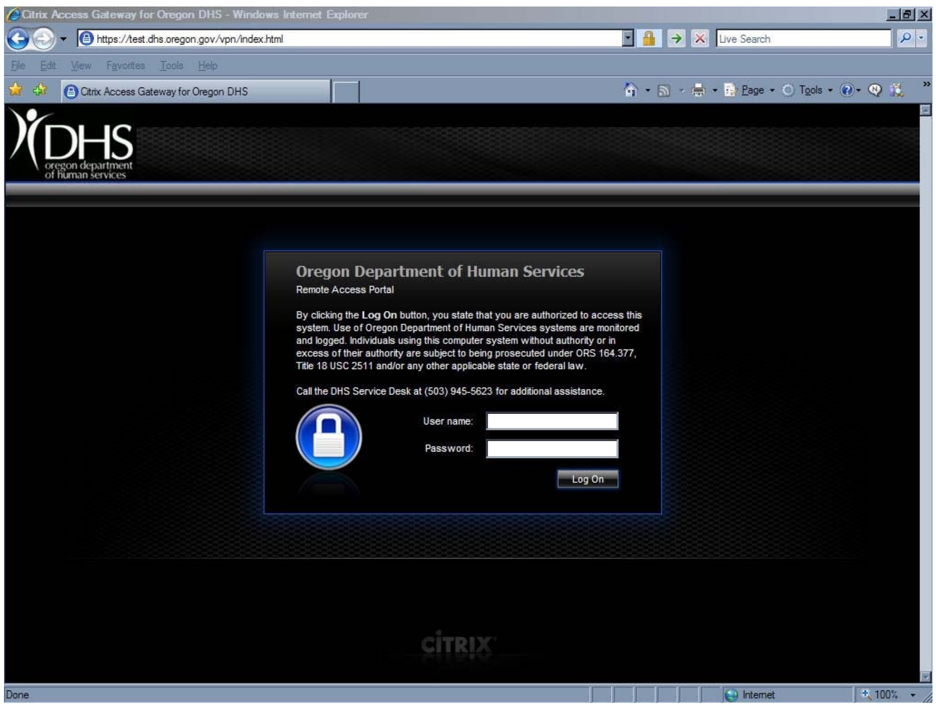


Figure 2: Citrix "Log On" Screen

- The "**Citrix Log On**" screen will appear.

3. **Enter your Citrix User ID and Password, then click the "Log On" button.**

- Your coordinator will get a state-issued "P" number for you from App Support. This number is required for anyone using TWIST and insures the security of the data system.

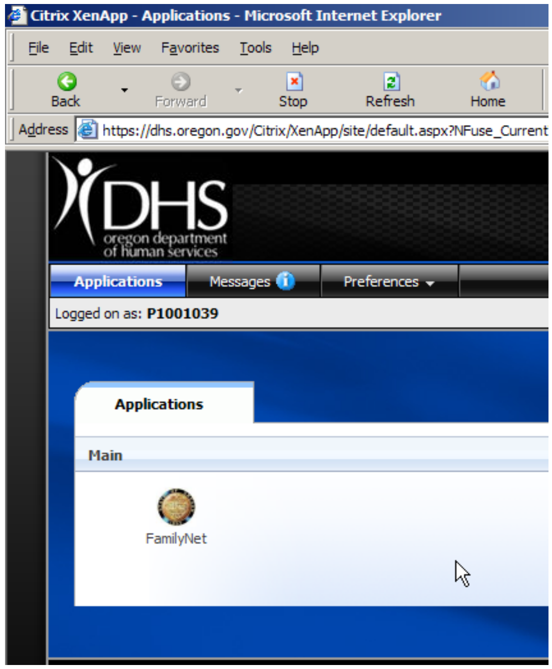


Figure 3: Citrix window showing FamilyNet Icon

4. **Click on the FamilyNet Icon.**

- The “**Log On**” screen will appear.

Figure 4: TWIST “Log On” Screen

5. **Log on to FamilyNet.**

- To log on you will need two items: a TWIST User ID and a password. This is how you will access the TWIST System.

- Your coordinator will give your User ID and password to you.
- You will need to clear the state issued “P” number from the User Id field and insert your TWIST User ID.
- By logging on to TWIST, you will establish a communication link between your computer and the state data base. This allows all information you enter into TWIST on your computer to be added to the central database.
- This is an important step to ensure all WIC information is shared across the state.

6. **Type your User ID in the “User ID” field.**

- This is how the system will track who performs what task.
- Your User ID is unique to you and allows you access to functions in the TWIST system that are specific to your job position and location.
- Your login determines which areas of the system you may access and whether you may edit information or only view information in TWIST screens. Your coordinator will determine what level of security is appropriate for your position in WIC.

7. **Tab to the “Password” field.**

8. **Type in your password.**

- Your password should be a unique word or combination of letters and numbers that only you know.
- A password must be at least 6 digits long, must begin with a letter and is case sensitive.
- You must enter your password exactly the same every time.
- If you forget your password, your System Administrator (usually your coordinator) can reset it for you

Example: A12345 or A12bc3.

9. **Click on the “OK” button to complete your log on.**

- The “**Log On**” screen will disappear and be replaced with the “**Select Modules**” screen.
- The “**WIC**” tab will be showing.
- Other program tabs will be activated depending on your log on.

Finding Your Way in TWIST

1. **The "Select Modules" screen will allow you access to the different areas of the TWIST system**

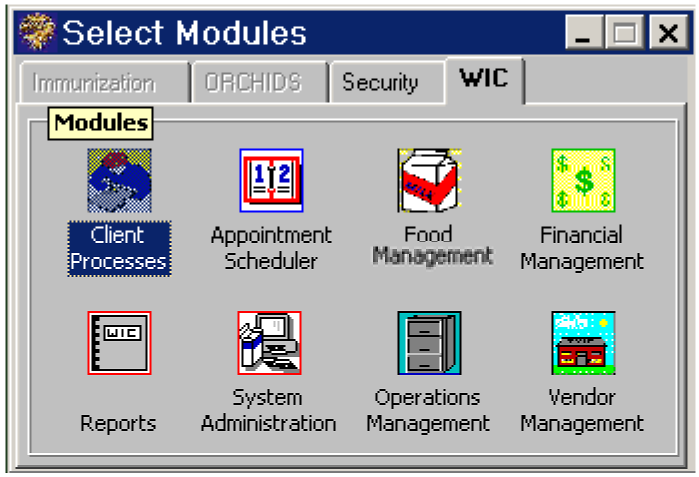
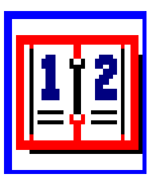


Figure 5: "Select Module" Screen

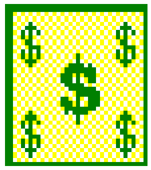
Let's review each area and discuss what task can be performed in each one.

- "**Client Processes**" is where all client activities take place, including demographic information, certification, medical and health information, nutrition education information and food package information.

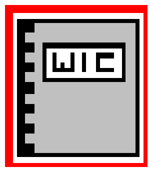


- "**Appointment Scheduler**" is where appointments can be made, changed, canceled or marked as kept. Clinic and staff schedules are also created in this section.

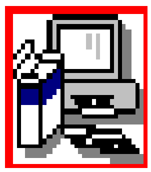
- "**Food Management"** is where the state manages the foods and formulas that are authorized for use in WIC.



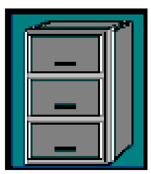
- "**Financial Management**" includes functions dealing with caseload management, Federal reporting forms, cash flow and rebates. This area will be used primarily by the State office.



- "**Reports**" incorporates all reports from all areas. Reports may be created and/or run from this section.



- "**System Administration**" is the section where end of day processing occurs.



- "**Operations Management**" is where agency and clinic information, staff data, outreach organizations and organizational unit information is contained and can be modified.

- "**Vendor Management**" includes all vendor functions — authorizing vendors, monitoring, education, vendor lookup and documenting complaints and actions. This is another section that will be used primarily by the State staff.

2. **Double click on any icon.**

   This opens any of these functional areas. A window with a menu bar will appear on monitor. This window will allow you to open the various screens to perform tasks within the system.

Ensuring Confidentiality

TWIST data is the same as paper WIC files and needs to be handled with the same care for confidentiality. When viewing client records, screens should never be left unattended or visible to other clients. Always remember to lock your workstation, log off or exit out of TWIST after you have completed working on a client or a task and before walking away from the computer.

Locking Your Workstation

1. **Press the “Ctrl,” “Alt,” and “ Delete” keys at the same time.**

2. **Click on the “Lock Workstation” button.**

Unlocking Your Workstation

3. **Press the “Ctrl,” “Alt,” and “ Delete” keys at the same time.**

4. **Enter your password.**

   The computer windows will be accessible again.

♫ NOTE: For more information about confidentiality when using TWIST, refer to the following lessons: “WIC Intake” and “Client Search and Demographics”.

Logging Off TWIST

1. **Log off TWIST by closing all open TWIST screens.**

   - You must also close the “**Select Modules**” screen. All that will remain is the “**Log On**” icon.
   - You will need to log off TWIST at the end of the day or anytime you are going to be away from your computer for a long period of time. This will prevent anyone from using the computer with your ID and password logged on.

✂ *Tips and Shortcuts:*

- You should <u>never</u> let your User ID be used by anyone else.
- <u>Never</u> give your password to anyone and change it any time you think someone may know it.
- You may change your password at any time by clicking on the “**Change Password**” button. You will then be prompted to type your new password. Retype your new password a second time in the “**Confirm New Password**” field. Click on the “**OK**” button. Your password has been changed.

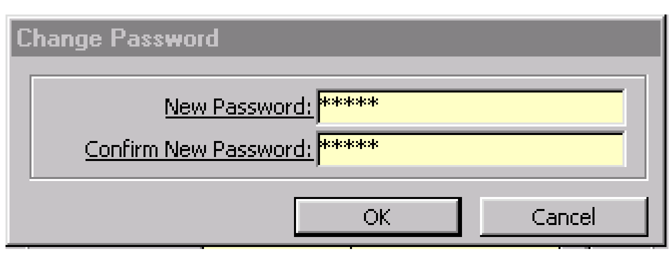


Figure 6: “Change Password” Pop-Up

➥ *Practice Activities:*

1. Double click on the “Log On” icon.
2. Log on to TWIST with your User ID and password.
3. Click the “OK” button.
4. Double click on the “Client Processes” icon.
5. Close the screen to log off TWIST.
6. Select “Nutrition Education.”
7. Click on “Tables” in the menu bar.
8. Close the screens back to the “Select Modules” screen.
9. Click on “Enrollment & Intake” in the menu bar.
10. Close the screen.
11. Click on “Applicant Prescreening.”
12. Click on “Breastfeeding Topics.”

✓ *Skill Check:*

Follow the instructions listed below. If you are asked for an answer, write in the answers in the space provided.

1. Open the “Client Processes” module.
2. List all items that appear in the menu bar.

✎

3. Click on “Certification.”
4. How many items are in the drop down menu?

✎

5. Exit out of this screen back to the “Select Modules” screen.
6. Open the “Food Management” module.
7. Which menu item has the most items in the drop down menu?

✎

8. Exit back to the “Select Modules” screen.
9. What did you click to get back to the “Select Modules” screen?

✎

10. Exit out of the “Select Modules” screen.
11. What screen are you at?

✎

12. Are you still connected to the state WIC office?

✐

13. Log on to TWIST.
14. Circle True (T) or False (F) for each statement.

T or F You only need to log off TWIST at the end of the day before you go home.

T or F You should not share your password with anyone.

T or F Your User ID is what determines what you to will have access to in TWIST based on your job title and location.

T or F You don't have to worry about sharing your password because you can change it at anytime.

T or F Clients will never have access to your computer so it is okay to leave a screen open when you aren't there.

✍ Notes

Chapter 1: TWIST Overview
Section 2: TWIST Basics
Lesson: TWIST Screen and Data Entry

Objectives:

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

- correctly identify and appropriately utilize the different parts of the TWIST screens;
- open, save and exit individual records;
- enter and modify data;
- follow policies regarding mandatory data;
- work with more than one client record open at a time; and
- move from one client record to another.

Oregon Policies:

♦ 640 Documentation

Overview:

Now that we have learned how to access TWIST and move around in the system let's take a closer look at the screens and the tools available in TWIST.

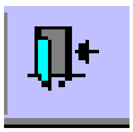
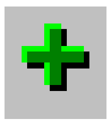
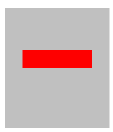
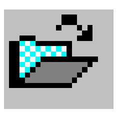
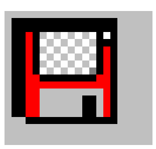
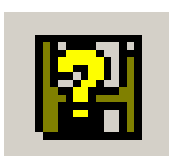
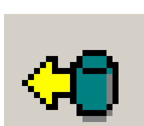
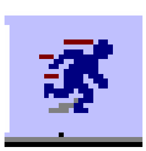
Instruction:

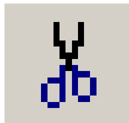
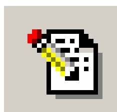
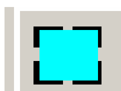
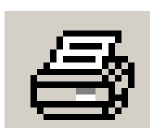
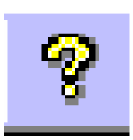
Reviewing the Toolbar

TWIST uses the Windows format and many of the same icons and menu text.

- **Title Bar** – Located in the top left corner of the screen, it shows the title of the window that is displayed.
- **Minimize, Maximize and Exit Buttons** – These are the buttons in the top right corner of screen.
- **Menu Bar** – Menu selections at the top of the screen.
- Drop Down Menu – A drop down menu gives more selections from the menu bar.
- **Hint Text** – Move your cursor over an icon. The small box of text that appears is called a hint text. The hint text tells you the function of the icon.
- **Task Bar** – Located at the bottom of the screen and includes the start button and time.

- **Status Bar** – Located at the top of the Task Bar. It shows system messages and the user name.
- **Toolbar** – The following are icons that are used on the toolbar in TWIST:

Icon Picture	Icon Name	Icon Description
	"Close" icon	The "Close" icon allows you to exit the current screen and return to the previous screen. Selecting "Close" on the menu, under "File," gives the same result.
	"Insert" icon	The "Insert" icon is used when you want to add an additional row of information.
	"Remove" icon	The "Remove" icon will remove information from a section or row.
	"Open" icon	By clicking on the "Open" icon, you will open a selection window that will allow you to do a search.
	"Save" icon	This is the standard Windows icon for saving your work. You should always save your work before you leave a screen. If you have entered new data, TWIST will ask you if you want to save as you exit a screen.
	"Save As" icon	This icon is only seen on report files that can be exported to Excel.
	"Refresh" icon	The "Refresh" icon will restore the information on the screen back to the most current saved data.
	"Fast Path" icon	This icon allows you to move quickly from window to window. Clicking on the icon will give you a list of the windows that you can fast path to.

Icon Picture	Icon Name	Icon Description
	"Cut" icon	When clicked, this will allow you to move or "cut" highlighted information from the screen and hold it on a hidden clipboard until it is pasted where you want it to go.
	"Copy" icon	Highlighted information is copied to the hidden clipboard and can be pasted to another field.
	"Run" icon	This icon must be clicked on to run a report.
	"Clear" icon	This icon will clear all fields on the current screen.
	"Paste" icon	"Paste" is the second step to cutting or copying. Once information is on the clipboard, click in the field where you want the information to be and click the "Paste" icon. The information will appear in that field. These buttons can save you unnecessary typing.
	"Print" icon	The "Print" icon will send forms or reports associated with the screen to the printer for printing. Clicking on the "Print" icon will **not** print the screen.
	"Help" icon	When you click on this icon you will access information about the section of the system you are in.

TWIST Screen Review

The starting point for this section is:

Client Processes ⇨ Enrollment and Intake ⇨ Applicant Prescreening

1. **Data Fields**

The first thing you may notice is that data fields are different colors.

1.1 Fields that are **Yellow** are mandatory fields.

- Information must be entered in all of these fields to continue to the next screen.
- These fields have been selected as mandatory fields in compliance with federal guidelines or state policy.
- If you want more information, refer to Policy 640 in your *Oregon WIC Policy and Procedure Manual* (PPM).
- In certain screens, a checkmark will appear on a tab to indicate all mandatory fields have been completed. This does not mean that the client is income eligible, however, it just means the user has filled out all mandatory fields

1.2 Fields that are **White** are optional fields.

- If you have information you may enter it, but it is not required.

1.3 The **Gray** fields are system-generated fields.

- TWIST will enter the data into these fields.
- You cannot change or delete this information.
- These are referred to as "Display" fields.

2. **Tabs**

TWIST is designed to be easy and fast. To assist you, some windows are divided into sections and these sections are called tabs.

- The tabs represent additional screens.
- By clicking on a tab you move from one screen to another.

3. **Drop Down Arrows**

- Clicking on this arrow will give you a list of choices for the field.
- You must select one of these choices.
- No other answers will be accepted in this field.

♫ NOTE: You do not have to use the drop down arrow if you know the acceptable value and type in the first letter in the field.

4. **Buttons**

Buttons appear as raised gray boxes on the screen.

- Buttons can provide access to pop-up windows.
- Pop-up windows may also have other buttons to activate additional pop-up windows.
- Buttons will allow you to perform some of the same functions you would find on the toolbar while you are in a pop-up window. For example, you might see a “Remove” or an “Insert” button.
- Buttons can be used to perform other special functions.
- If you click the “OK” button to exit a screen, any data you entered will be saved.
- If you click on the “Cancel” button to exit a screen, you will close the window, but the information will not be saved.

5. **System Messages**

TWIST also displays messages on the screen when you perform certain actions. A variety of messages are generated throughout the system. Specific messages are discussed in the lessons on the screens where they appear.

➥ *Practice Activities:*

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

1. Log on to TWIST.
2. Select your assigned agency.
3. Double click on the “Operations Management” module.
4. Click on the drop down menu for “Operations.”
5. Select “Agency/Clinic Information.”
6. In the “Mail Category” field use the drop down arrow to choose “Shuttle.”
7. Click on the “Clinic Information” tab.
8. Click on the “Phones” button.
9. Click “Cancel” to close the pop-up window.
10. Close the “Agency/Clinic Information” screen.
11. Exit “Operations Management.”

You have been introduced to the parts of the TWIST screen, which is like learning about the parts of a car and how to use them before you start driving. Now it’s time to learn some basic driving skills.

Entering Data

There are several places and ways to enter data.

1. **Manually Entered Data**

There are three ways to manually enter data.

1.1 Field

- Type answers directly into the space.
- The acceptable answers can be a number or a word depending on the field.

Example: "Number in Family" is a number answer and "Income Provider" is a word answer.

1.2 Drop Down Arrow

- Lets you select from a list of acceptable choices.

1.3 Pop-Up Window

- A window where you can enter specific information.
- Use buttons to access pop-up windows.
- You cannot use the toolbar when you are in a pop-up window.
- You must close the pop-up window before you can exit the screen.

Example: "Averaging" button activates a pop-up window.

2. **Automatically Entered Data**

There are several ways the TWIST system will automatically enter information.

2.1 System Defaults

- Some fields will be automatically populated with an answer.
- Defaults are designed to save you time by populating the field with the most common response.
- You will only have to enter an answer into the field if the answer is different than the default.

- Overriding a default is easily done by selecting the correct answer from the drop down list or by typing the answer into the field.

Example: You are enrolling a pregnant mom having twins and the "Unborn Counted" field defaults to 0. To change this to count the unborn twins, you would type a 2 into the field.

2.2 Automatic Calculations

- The system will do mathematical calculations automatically in some fields.
- It will take the data you have entered and complete the calculation.
- You cannot override or change these fields. They are gray fields and for display only.
- When you change the data that you had previously entered, the gray field(s) will change to reflect the new calculation.

Example: The monthly and annual income fields will be automatically calculated based on the data you enter in the interval and amount fields.

2.3 Auto-Fills

- The system will transfer information entered in one section to another section automatically.

Example: After enrolling a temporary newborn, the system will automatically update the mother's record with selected information.

2.4 System Generated

- This refers to how the system is able to look at information from several screens and/or functional areas in order to create or select appropriate data to enter into another screen or functional area.

Example: The system will look at information entered in several different screens in the certification area such as medical, health history, and diet to select or generate appropriate risks to assign to that client.

3. Numerical Data

Here is information on how to enter numerical data.

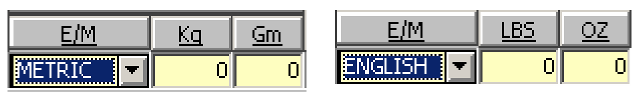
3.1 Date

- mm/dd/yyyy is the correct format for a date. Month and day must be two digits, and years must be four digits.
- The system will add the back slashes for you.
- The system will automatically zero out the field if the date is entered in an incorrect format. If you tried to enter in 1/1/03 the field would read 00/00/0000.

Example: January 1, 2003, would be entered as 01012003.

3.2 English/Metric

- E/M is the drop down list that allows you to select whether the data you are entering is in English or Metric measurements.
- The system will change the labels of the fields to match what type of data you are entering.



Example: If you select Metric in "Weight," LBS will change to Kg and OZ will change to Gm.

♫ NOTE: When information is entered metrically and saved, the system will convert the information and save it in English.

3.3 Fractions

- The system fields accept fractions in eighth-of-an-inch increments. All measurements must be converted to this form.
- Only the top number of the fraction will need to be entered into the field.

Example: An infant is 20 3/8th inches long. 20 would be entered into the "inches" field and 3 would be entered into the "1/8 inches" field.

3.4 Decimals

- Decimals are entered into a field as a whole number using the period as a decimal point.

Example: For a hemoglobin value of 12.3, you would type 12.3 into that field.

3.5 Unknown Value

- You can indicate a value is unknown or waived by entering 9's in place of the missing value.
- If the missing value has two fields, such as pounds and ounces, the system will automatically fill in the second field with 9's once the first field contains 9's.
- A field with 9's will not be graphed and will not calculate percentiles or BMI.
- The number of nines entered into the first field will be dependent on the maximum number of digits allowed in the field.
- If you have an unknown value for a field that has a drop down, select "unknown value."

Add, Delete, Change and Save Data

1. Adding Data

There are two ways to add information.

1.1 Type new information into an existing empty field.

1.2 Use the "**Insert**" icon or "**Insert**" button to add a new, blank field and then type in your new data.

2. Deleting Data

There are four ways to delete data.

2.1 Use the "**Remove**" icon located on the toolbar.

2.2 Click on the "**Remove**" button in a pop-up window.

2.3 Use the "**Delete**" function key on your keyboard to clear a field.

2.4 Backspace or use the space bar to remove data in a field.

- Some data cannot be deleted or changed after it has been saved. It becomes part of the client's permanent record.
- Health history questions and medical data are examples of areas that cannot be deleted once they have been saved.
- The system will notify you with a system message if you try to delete inappropriate data.

3. Changing Data

There are two ways to change data. In either case, the data will not change in the system until you move out of the field that has been changed.

3.1 Delete and type over existing data with new data.

3.2 Add new information to a new line.

- The system will recognize the data based on the date and time entered.
- This is how you would handle a situation where you have made a mistake in entering data and the data has already been saved.

Example: Let's say you are enrolling a child and instead of entering 35 lbs for a weight you enter in 53 lbs. You do not realize the error until you have completed the other tabs in certification and the data has been automatically saved. You will be able to change medical information until the end of the workday. If information needs to be changed after "End Of Day," you will have to enter the correct weight of 35 lbs on a new line with the same date. The system, even though it is the same date, will now recognize this last entry as the current weight based on the time of entry.

4. Saving Data

The system will automatically save your data as you work. It will save the data when you move from tab to tab.

♫ NOTE: If all mandatory fields have not been completed before you move to another tab, the system will display a message prompting you to complete the field.

When you try to exit a screen, a system message will prompt you to save. There are two manual ways to save:

4.1 Use the "**Save**" icon.

4.2 Use the Windows "**Save**" function in the "**File**" drop down menu.

➥ *Practice Activities:*

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

1. Double click on “Client Processes.”
2. Click on “Enrollment & Intake.”
3. Open “Applicant Prescreening.”
4. Use the drop down arrow to select a category for the “Calculate Income For field.”
5. Tab out of the “New Income Field” to save the change.
6. Move cursor to “Number in Family” field.
7. Type in the number of family members.
8. The “New Income Date” field is system generated and may not be changed.
9. Move cursor to “Income Provider” row.
10. Type the name of the wage earner in the first row.
11. Tab to next field and select the appropriate“interval.”
12. Tab to next field and enter a dollar value for “amount.”
13. Tab to next field and type w in the field. Does “wages” auto fill as the source?
14. Tab to the next field and select a proof of income from the drop down list.
15. What fields that are now automatically calculated. The correct answers are “Monthly,” “Annual,” and “Totals.”
16. Insert a second row. Enter data in all mandatory fields.
17. Delete the second row of data.
18. Exit “Enrollment.”
19. Read the system message you get.
20. Click “No.”
21. Close the screen.
22. Exit “Client Processes.”

One User, Multiple Clients

The system allows you to open a second client record while working with the first client. This situation may occur when you are processing a walk-in client and another is on the phone and needs information or if you are working with two people from the same family.

The starting point for this section is:

Client Processes ⇨ Enrollment and Intake ⇨ Applicant Prescreening

1. **Select the “Open Folder” icon and select a client.**

2. **Minimize the current screen you are working in.**

3. **Click “Select Modules” on the status bar.**

4. **Double click on the module you need for the second client.**

5. **Access “Client Primary” and select the second client and return with the client.**

6. **Complete the activity for the second client and save.**

♫ NOTE: You can “toggle” between the open client records. “Toggle” between client records by clicking on the buttons on the status bar. Be sure to save data before toggling to the second client.

7. **Click on the first module on the status bar and complete activity for first client.**

♫ NOTE: The hint text on the status bar will tell you the name of the client that box represents.

8. **Save and exit.**

Multiple Users, Same Client Record

The system allows multiple users to open the same client record at the same time. This situation may occur when two staff members are working with the same client.

1. **Users working in different screens or tabs.**

    1.1 Multiple users may enter data in the same client record when they are on different tabs in the same screen or on different screens.

    1.2 Both sets of data will be saved.

Example: The clerk enters income data when the client arrives but gets interrupted by a phone call before they can finish entering the change of address. The client proceeds to the lab technician who pulls up the same client record and enters medical data. The clerk and the lab technician save at the same time. All information has been saved and utilized by the system because they were in different areas of the same client record.

2. **Users working in same screen and tab.**

2.1 The system does not allow multiple users to enter and save data at the same time within the same screen.

2.2 If both users enter data on the same screen, the information saved first will be utilized by the system.

2.3 When the second user tries to save the information, they will get a system error message. The user will have to refresh and re-enter data before the system will utilize the new information.

Example: A lab technician and a certifier have the "Medical Data" screen open for the same client and enter information. The certifier hits save after the lab technician. The information entered by the lab technician will be the most current and will be utilized by the system for risk assessment. The certifier will get an error message and need to refresh the screen before proceeding.

✂ *Tips and Shortcuts:*

- When there are multiple values listed in a drop down list, continue to hit the first letter of your selection until the value is displayed.
- Hint text on the status bar will tell you the name of the client that box represents.
- Never open more than three client records at the same time.
- Use it, save it and leave.
- "Toggle" between client records by clicking on the buttons on the status bar.
- You can also use the refresh button when you have entered a number of incorrect data and want to start the screen over again.
- Refresh doesn't update changes to base tables.

Example: You are working on scheduling an appointment and decide that a change must be made to the appointment type information. You go to the base table, fix it and then return to your screen only to find that the information is not there. You have to log out of TWIST and then log back in for the new base table information to show. This is because the system doesn't check base tables after you have logged in to keep traffic down in the system and keep it running fast and smooth.

✓ *Skill Check:*

Follow the instructions listed below. If you are asked for an answer, write or circle the answers in the space provided.

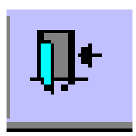
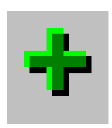
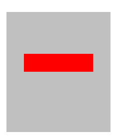
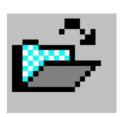
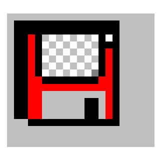
Road Trip Check List

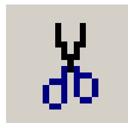
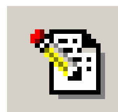
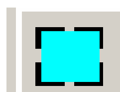
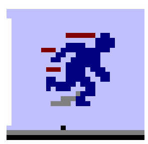
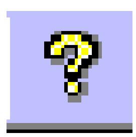
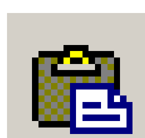
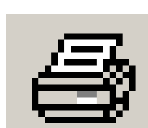
The starting point for this section is:

Client Processes ⇨ Enrollment and Intake ⇨ Applicant Prescreening

Tom Tester:

- The TWIST system mechanic has recommended that we check out our system before we take it out on the road.
- Below are two check lists that Tom wants you to complete.
- You will need to complete each task and answer each question in the order they are presented in Checklist 2.
- You will match the icon or description in Check List 1 to the task or answer in Check List 2.
- Place the number from Checklist 2 in the space provided next to Check List 1.

Answer	Checklist 1	Checklist 2
		1. Select "Client" in "Calculated Income For" field. What icon did you use?
		2. The box next to "Number in Family" is called this.
		3. What color is an optional field?
		4. Click on the "Averaging" button. What type of window do you get?
		5. Enter two rows of information under "Income Provider." Enter the following information: Row1 – Ashley Albany Interval – Monthly Amount - $50 Source – Wages Proof of Income – Paystub

Answer	Checklist 1	Checklist 2
		Create a second row. What icon did you use to insert the rows?
		6. Copy Ashley Albany's name. What icon do you use?
		7. Paste Ashley's name into the second row. What icon did you use? (Print a screen shot here.)
		8. Delete the first row of information. What icon can you use to delete? (Print a screen shot here.)
		9. What icon would you use to cut?
		10. What icon would you use to run a report?
		11. What icon do you use to find a Fast Path?
		12. What icon would you use to get help?
		13.What icon will open up a client record?
		14. What should you do before you leave a screen to prevent any loss of data? What icon can you use?

Answer	Checklist 1	Checklist 2
	Unknown Value	15. Which icon clears all fields on a report screen?
	Yellow	16.What icon would you use to print?
	White	17. What would you select if you wanted to enter medical data in as a Metric measurement?
		18. What would you use 9's for?
	Pop up	19. What color is a mandatory field?
	Field	20. What color is a system generated field?
		21. Exit “Applicant Prescreening.” What icon did you use?
	Gray	22.What icon would you use to view the most current information.

Circle True (T) or False (F) for each of the following questions.

T or F When you change data in a field, you must move to another field before the TWIST system will recognize that new data has been entered.

T or F The amount field is automatically calculated by the system.

✍ **Notes:**

Chapter 1: TWIST Overview
Section 2: TWIST Basics
Lesson: Fast Paths

Objectives:

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

- identify and use the "**Fast Path**" icon.

Overview:

The "**Fast Path**" icon is found on the tool bar. Fast paths are short cuts found throughout TWIST and allow you to quickly move from one screens to another. Fast paths are available only on certain screens throughout the system.

In the following section you will learn how to use fast paths to help you move easily from one function to another by just clicking one button.

Instruction:

Using Fast Paths

The following is an example of one "**Fast Path**," but the process is the same through out TWIST, wherever you find the "**Fast Path**" icon.

1. **Double click on the "Client Processes" icon.**

2. **Click on "Enrollment & Intake."**

3. **Click on "Enrollment."**

4. **Click on the**  **"Fast Path" icon.**

    - The "running man" icon is an easy reminder that you are selecting a speedy path. This refers to how this function will allow you to go to other screens.
    - The "**Fast Path Options**" pop-up will appear.

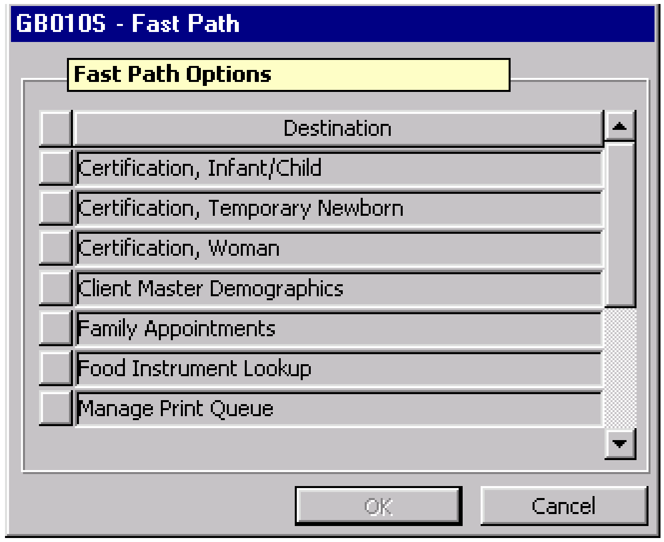


Figure 1: "Fast Path Options" Pop-Up

- This pop-up will act as your road map and will list all of the possible function screens or fast paths you can select.
- The fast paths to which you can link are determined by which functions you logically need to go to from the current screen.
- When no "**Fast Path**" is available, the icon will be grayed out.

Example: Fast paths listed in "Enrollment" allow you to drive into several client-processing areas such as: certification screens, food package and food instrument screens, client history screens, and appointment screens.

5. **Click to select the "Certification, Woman" screen.**

6. **Click "OK" to move to the "Certification, Woman" screen.**

   From this screen you have two options.

   6.1 You may use the fast path from this screen to go to another screen.

   6.2 You can exit this screen to return to the "**Enrollment**" screen. When you close a screen that you used a fast path to reach, you will always go back to the previous screen.

7. **Click on the**  **"Fast Path" icon.**

8. **Click on "WIC Intake" screen (Enrollment).**

You have now returned to the "**Enrollment**" screen.

➥ *Practice Activities:*

Let's try driving on the fast paths a little more.

1. Click on "Enrollment."
2. Click on the "Fast Path" icon.
3. Click on "Certification, Woman"
4. Click "OK."
5. Click on the "Fast Path" icon.
6. Click on "Family Appointment Record."
7. Click "OK."
8. Click on the "Fast Path" icon.
9. Click on "Daily Clinic Schedule."
10. Click "OK."
11. Close the "Daily Clinic Schedule" screen.
12. Close the "Family Appointment Record" screen.
13. Close the "Certification, Woman" screen.
14. Close the "Enrollment" screen.
15. You should now be back the "Client Processes" screen.

✓ *Skill Check:*

Go ahead and try it!

✍ *Notes:*

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Chapter 1: TWIST Overview
Section 3: Equipment
Lesson: Equipment

Objectives:

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

- describe how different equipment communicates data;
- follow the basic troubleshooting protocol; and
- identify what lessons describe other equipment and information.

Overview:

A computer system such as TWIST is based on the extensive use of servers, computers, laser printers and card readers You will be operating thousands of dollars worth of new equipment and need to how to use it and when or where to call for help if it malfunctions.

In this lesson, you will discover how your TWIST equipment talks to each other and what to do if it stops doing what it is supposed to.

Instruction:

TWIST Equipment

1. Desktop Computers

    - Personal computers (PCs) have been issued for use by WIC staff at all permanent clinic sites.

2. Laptop Computers

    - For agencies that have satellite clinics, laptop computers have been issued.
    - Extreme care must be given to these pieces of equipment since they are very valuable and re-saleable.
    - Security measures should be used on each piece of portable equipment to ensure safety and security when staff are out of the room.

3. Laser Printers

- Each permanent and satellite site will have a laser printer to print out WIC forms and benefits lists.

4. Card Readers

    - Each work station will have a card reader for reading the eWIC card numbers.

5. Servers

    - The central state server is housed in Salem. It houses all client records for the state. Each PC connects to the state server through Citrix.

Following Troubleshooting Protocol

You have four resources at your fingertips to help you determine what to do if there is an equipment breakdown.

1. Local Agency Special User

2. This “Equipment” lesson and the “TWIST Equipment” Job Aid.

See Job Aid on “TWIST Equipment” for more information.

- The Application Support Desk has provided you with a **“TWIST Equipment”** Job Aid. If any of your equipment fails to function properly, use this guide before calling the Application Support Desk at the state office.

3. “Help” lesson in Chapter One, Section Four and “Application Support for FamilyNet – TWIST Module” Job Aid.

See Job Aid “Application Support for FamilyNet – TWIST Module” for more information.

- Refer to this guide if you are experiencing software problems.

[CW1]*Practice Activities:*

1. Your agency has had a power outage. When power was resumed, two of the desktop computers failed to function.

   N

2. Contact one of your agency's special users.

   N

3. The special user and you contact your internal Information System Staff to resolve the issue.

   N

Great job!

Skill Check:

1. Which lesson would you refer to if the power to the facility is off and none of the computers or printers will work?

2. Which lessons provide you with information on who and when to call the Application Support Desk?

Notes:

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Chapter 1: Overview and Client Primary
Section 4: Help
Lesson: Help

Objectives:

Upon completion of this lesson the user will be able to:
- locate and utilize the various "**Help**" features of TWIST; and
- contact the appropriate person for technical assistance.

Overview:

There are times when we all need some help and TWIST was created with those times in mind. Help is available at your fingertips with a simple click of the mouse or a touch of the phone pad.

The system has an on-line help feature that allows you to access the user's manual quickly. The "**Help**" pop-up provides you with information about the current window or allows you to search for additional information. In this lesson you will learn how to access the "**Help**" pop-up and how to search for information within the pop-up.

You will also receive information on how to contact the appropriate person for technical assistance with hardware or software problems as well as what to do in the event of a major system breakdown that halts agency operations.

Instruction:

How to Format a Lesson

The starting point for this section is:

Client Processes ⇨ Enrollment & Intake ⇨ Applicant Prescreening

1. **Select "Help Contents" from the "Help" menu.**

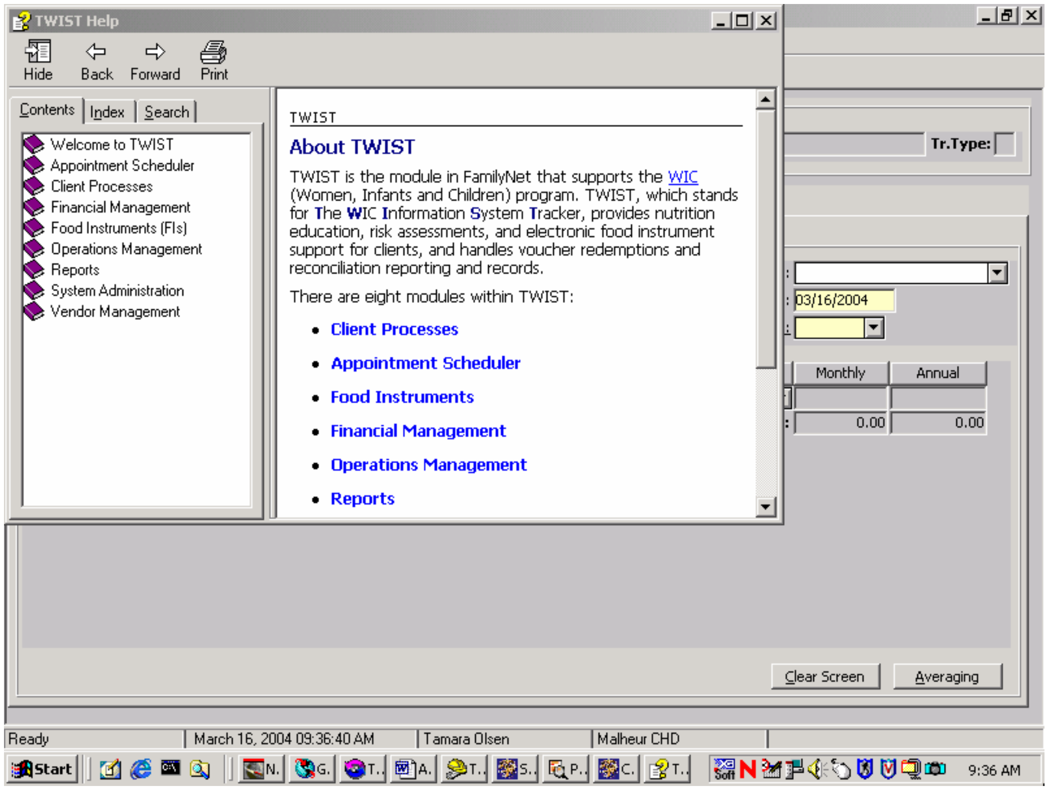

Figure 1: "TWIST Help" Pop-Up

- The "**TWIST Help**" pop-up is displayed.
- This is the typical "**Help**" pop-up found in most Window based programs.
- The pop up contains three search methods, "**Contents**," "**Index**" and "**Search**."
- Click "**Print**" to print a hard copy of the information.
- Click the "**Close**" icon in the upper right hand corner to close the "**TWIST Help**" pop-up.

Contents Tab

2. **Double click the "Books" to display sub-books or topics under the main headings.**

3. **Click on the question mark to display the help text for the desired topic.**

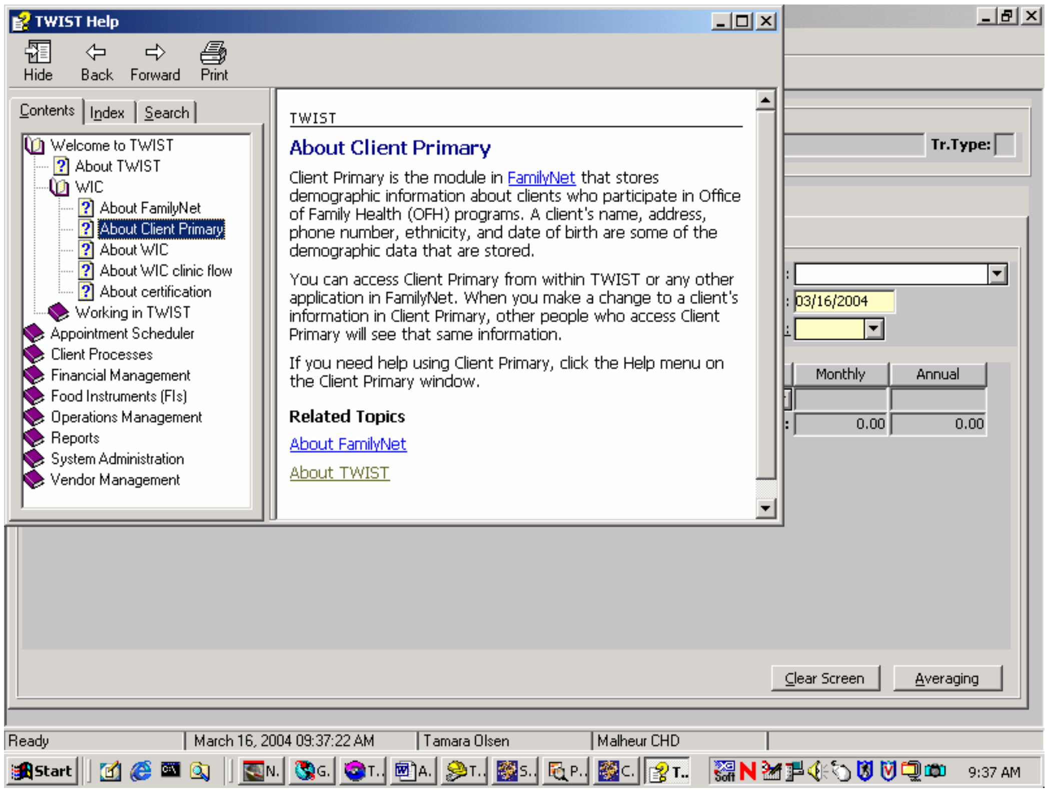

Figure 2: "Contents" Pop-Up

Index Tab

4. **Click on the "Index" tab.**

5. **Type a word or phrase in the "Type in the keyword to find:" field.**

Only those words and phrases that have been specifically indexed will appear as selection options.

6. **Highlight the word or phrase you want information on and click "Display."**

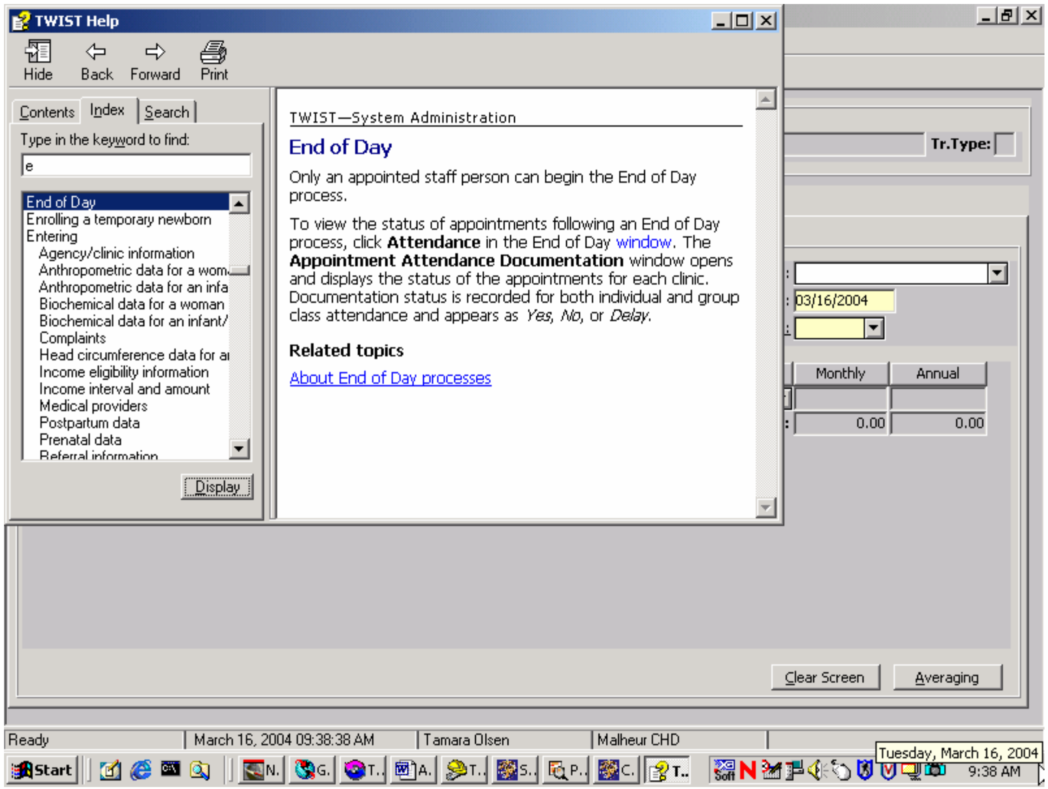

Figure 3: "Index" Pop-Up

Search Tab

7. **Click on the "Search" tab.**

8. **Type a word or phrase in the "Type in the keyword to find:" field.**

9. **Click the "List Topics" button.**

10. **From the "Select Topic to display:" box, click on your selection.**

11. **Click "Display."**

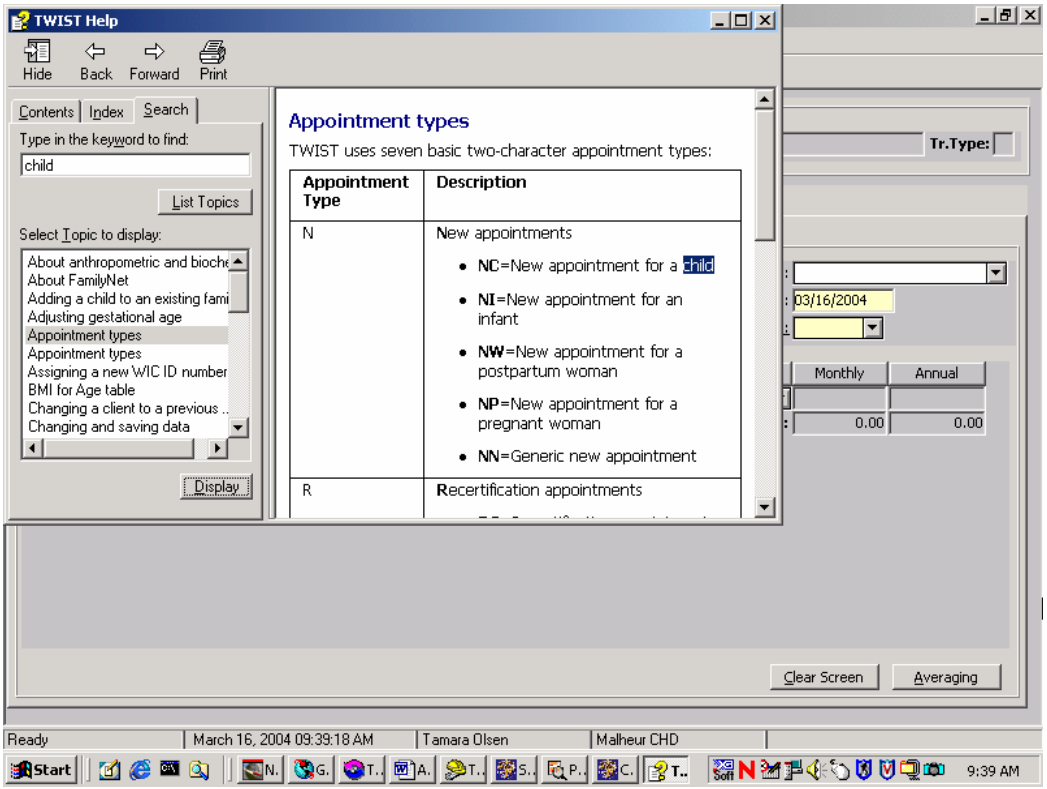

Figure 4: "Search" Pop-Up

12. **Click the "Exit" icon in the upper right hand corner to close "TWIST Help."**

13. **Exit "Applicant Prescreening."**

14. **Exit "Client Processes."**

Contacting the Appropriate Person for Technical Assistance

Technical assistance comes from the TWIST Application Support Desk. The purpose is to assist you when issues arise with processing client data, notifications, and/or reports.

How do you know when and how to call them?

Refer to the following information:

1. **For breakdowns that could cause a halt in agency operations, see the "TWIST Disaster Recovery" lesson in chapter 6, section 5 and "TWIST Disaster Survival Manual".**

2. **For hardware problem solving, follow the steps in the "WIC Equipment" Job Aid.**

☺ See Job Aid "WIC Equipment" for more information.

3. **For software problem solving, follow the recommendations listed on the "Application Support for FamilyNet" Job Aid.**

☺ See Job Aid "Application Support for FamilyNet" for more information.

✂ *Tips and Shortcuts:*

- The "**F1**" key can also be used to open the "**TWIST Help**" pop-up
- "**TWIST Help**" is available from all screens

➥ *Practice Activities:*

The starting point for this activity is:

Select Modules ⇨ Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

1. Select "Help Contents" from the "Help" menu.
2. Click the "Search" tab.
3. Type "Medical" in the "Type in keywords to find:" field.
4. Click the "List Topics" button.
5. Select "About certification" in the results box.
6. Click the "Display" button.
7. Review the information using the scroll bar to view additional information.
8. Close the "TWIST Help" pop-up.
9. Exit.

✓*Skill Check:*

Accessing the online help is easy as 1, 2, 3.

1. You are working with a client and the TWIST screen goes blank. The other Windows screens are still functioning. What would you do?

✎

2. There is a power outage in the clinic building and all computer equipment has shut down. Explain the first 3 steps you complete?

✎

3. In which of the following circumstances would you call the TWIST Application Support Desk? Circle the correct answers.
   - Your mouse won't move the cursor.
   - The TWIST screen you are working on freezes up and you cannot proceed.
   - One of the children you are certifying crawls under your desk and disconnects your computer before you saved the certification information.

✍ **Notes:**

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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 participant;
- correctly demonstrate entering participant data on the Client Demographics screens;
- enter and read urgent and non-urgent messages; and
- successfully change participant demographic information.

Oregon Policies:

- ♦ 587 Dual Participation
- ♦ 590 Other Participant Abuse

Overview:

The FamilyNet Data System includes the data applications for WIC, Perinatal, Immunizations, and Babies First. It stores all information common to participants across program applications, such as name, address, phone number and program participation.

TWIST is one module in FamilyNet. You will not notice much change when you move from the WIC application, TWIST, and into the participant demographic part of FamilyNet. To avoid duplicate records in the system, and therefore avoid dual participation in WIC, you must always search for a participant before you add a new participant on WIC or update an existing participant's record.

You will enter all participant demographic information in a few screens that are accessed easily from TWIST. Once a participant's information is entered, these screens are where basic demographic changes are made. Participants 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.

The contact information entered on these screens is used by the Automated Notification System for WIC Reminders (ANSWR) system for WIC appointment reminders.

This lesson will show you how easy it is to search for a participant and keep participant demographic data up to date. No matter where in TWIST you are working, the search process and participant demographics are handled the same way.

Instruction:

Searching for a Participant

You may search for a participant from many places in TWIST. One common starting spot is when screening a participant 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.

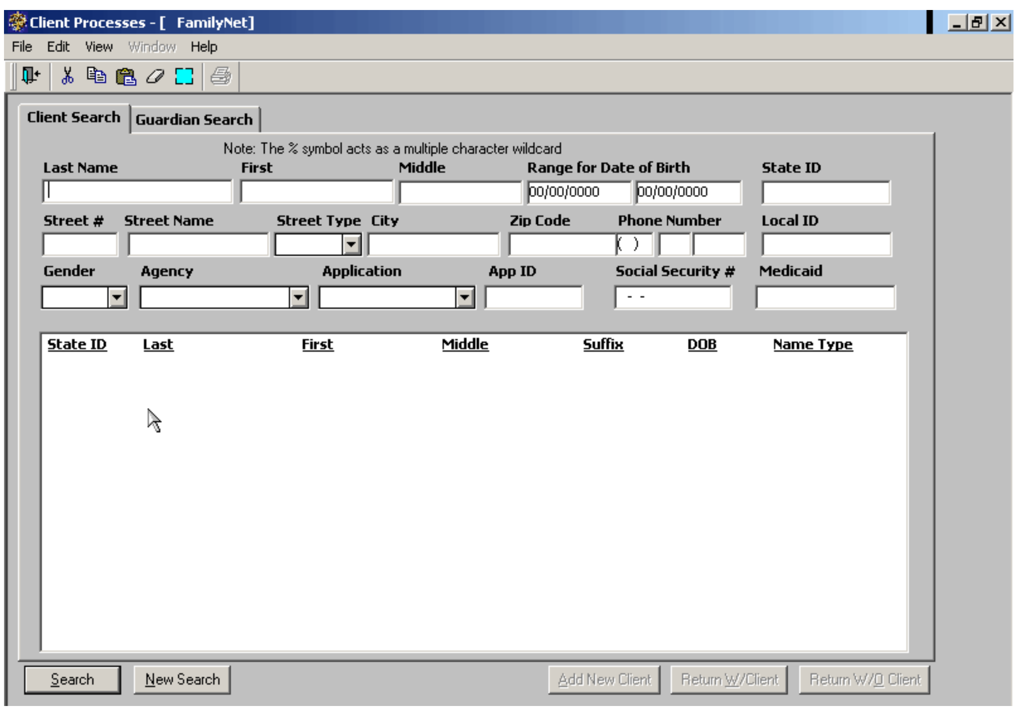

Figure 1: "Client Search" Window

- 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 participant 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 participant. 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 participant 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 participant, only one participant will be retrieved from the database. If only one general field is completed all participants 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 participants 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 participants. 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 participant 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 participant'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 participant'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 participant.

4.13 "**Application**" field. This is a drop down list that includes the programs in FamilyNet. If you knew the participant 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 participant'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 participant’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.**

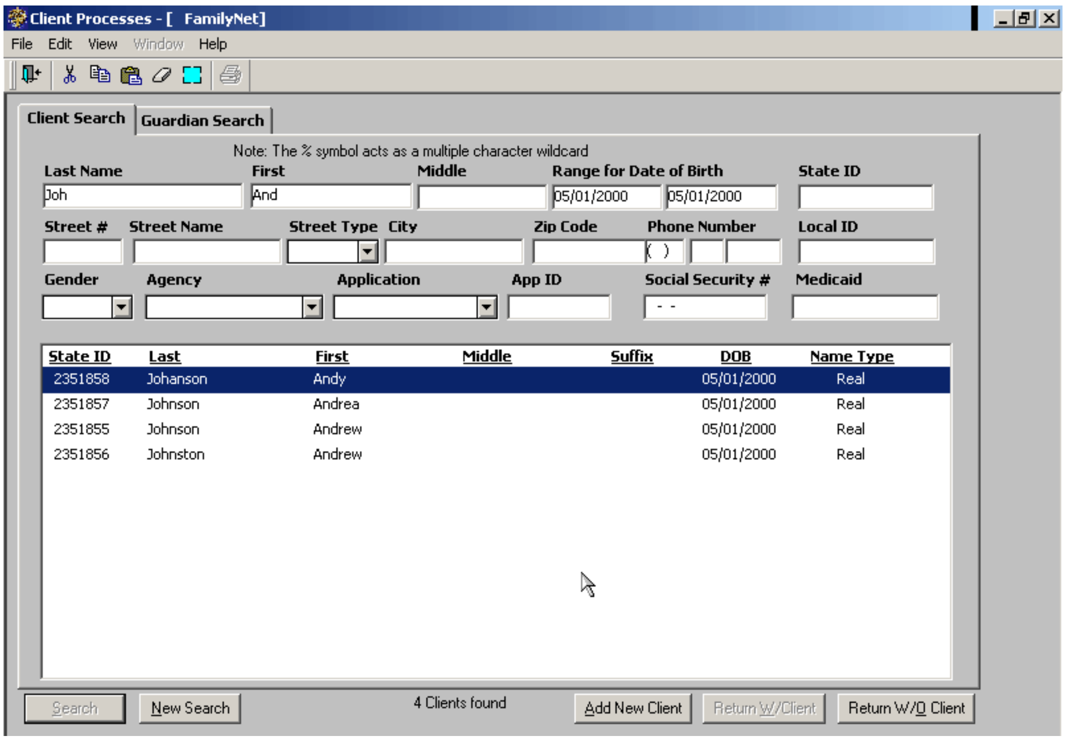

Figure 2: “Client Search” Screen with Search Results

- The participants found in the database matching your search criteria will be displayed alphabetically in the results box.
- If the DOB has been changed, it will appear in bold print.
- A note is generated between the “New Search” and “Add New Client” buttons. This text indicates how many participants were retrieved from the search.
- You may need to scroll down to view all participants listed.
- If there are no participants 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 participants is really long and you want to narrow your search using additional participant information, click the "New Search" button to clear the screen and reenter additional participant information.
- Clicking on a column heading will resort the results order.

♫ NOTE: To update or add demographic information about the participant 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 participant information.

9.2 Click the "**ReturnW/O Client**" button.

This returns to TWIST with no participant information.

9.3 Click the "**Close**" icon.

This returns to TWIST with no participant information.

Searching for a Guardian

This search will look for participants that have a particular guardian listed in their file. The search results will tell you the particular participants 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 participant, however there are not as many ways to search for a guardian as there are for a participant. 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.**

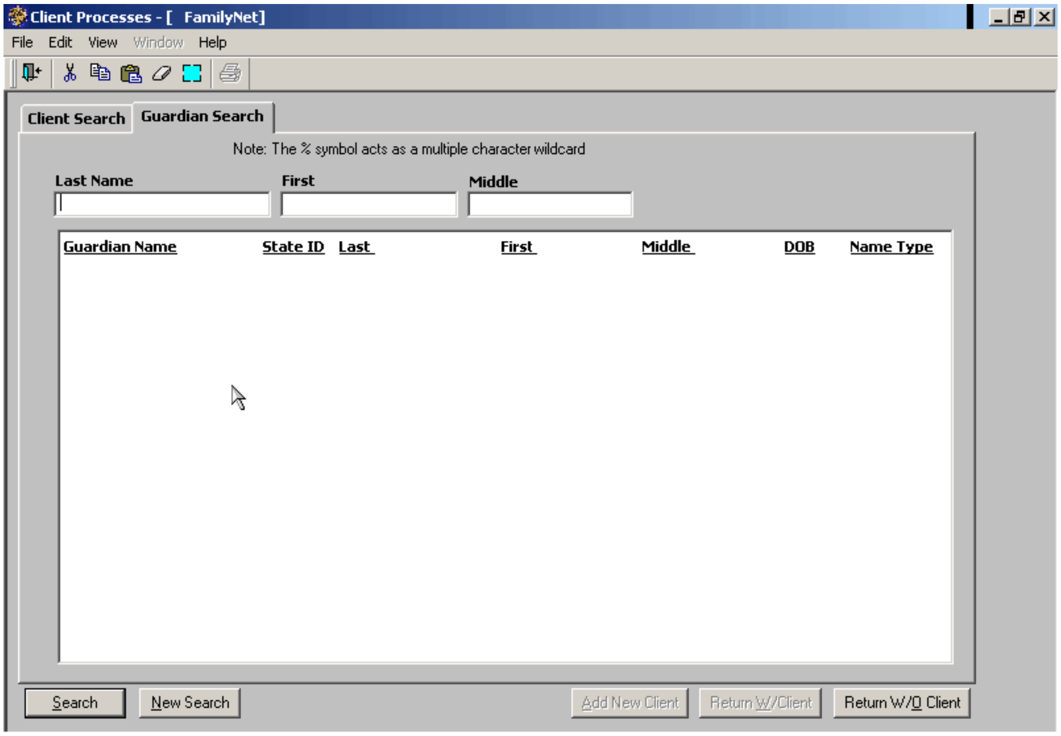

Figure 3: "Guardian Search" Screen

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 participant'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 participant information.

4.2 **Click the "Return W/O Client" button.**

This returns to TWIST without participant information.

4.3 **Click the "Close" icon.**

This returns to TWIST without participant information.

↪ *Practice Activity #1:*

Use the information from your ☛ Activity Sheet for this practice. You will be entering information to search for a participant.

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 participant.
9. Select the appropriate participant and click the "Return W/Client" button to return to "Applicant Prescreening."

Entering a New Participant

Before a new participant can be added to the database, a participant search using the preferred search method must be completed. This helps prevent having duplicate participants in the system. A new participant 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 participant 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 participant is there.

3.3 If the participant is there, double click on the name to go to the "Client Primary" screen.

3.4 If the participant 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.

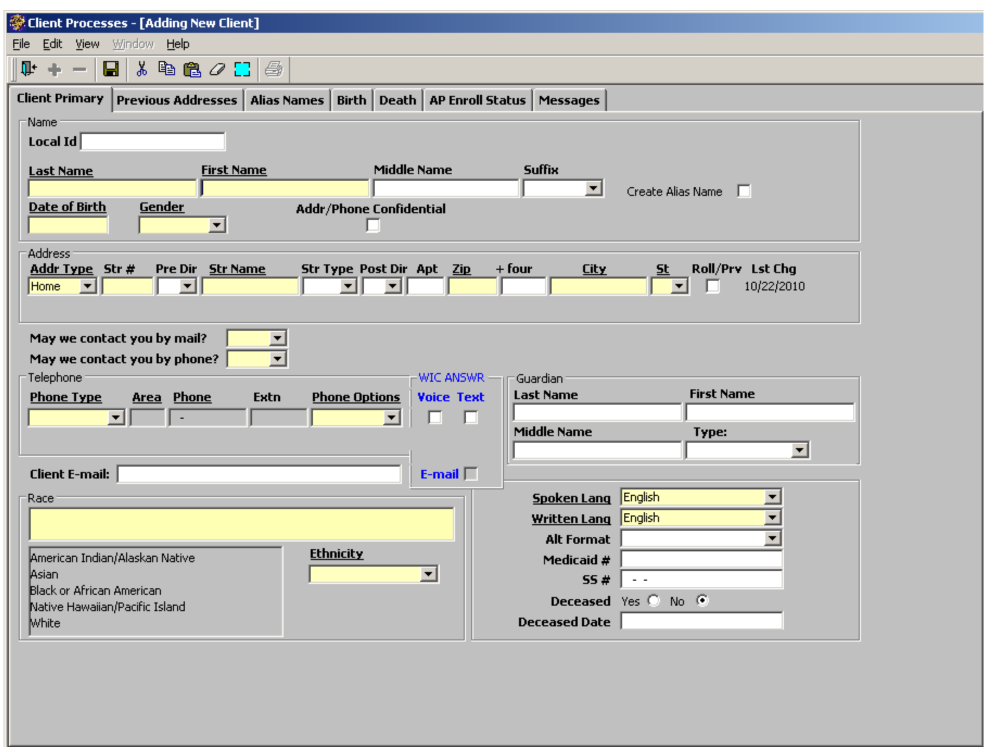

Figure 4: "Client Primary" Screen

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 participant's last name is Jones-Smith, the system will generate Jones, Smith, and Smith-Jones as alias names for this participant. Alias name is a search tool only and the system will show the participant's real name on all screens in TWIST.

♫ NOTE**: Do not include quotation marks when entering names.**

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 participant 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 participant's gender.

5.7 "**Addr/Phone Confidential**." Click on this box to indicate the participant'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 row are mandatory.

•♫ NOTE: if Homeless or Unknown is selected from the list, a mailing address must be added on a separate row, because a mailing address is required for the participant's eWIC cardholder account. If a mailing address is not documented on this screen, the participant could have difficulty accessing their eWIC cardholder account and/or could be prevented from purchasing their WIC benefits.

- "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"

♫ NOTE: The address information entered on the 'Client Primary' Screen automatically populates the address section for the First Cardholder on the 'Family Cardholder' Screen.

5.9 "**Roll/Prv**." This heading stands for Roll to Previous. This field would not be used when initially entering a participant 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 participant'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 "**May we contact you by mail?**" This field is used to indicate if the participant gives permission to be contacted by mail. The options are "Yes" and "No." If this question is answered "No," the participant's address will not be printed on appointment letters, postcards, or WIC reports that would normally display participant address.

5.12 "**May we contact you by phone?**" This field is used to indicate if the participant gives permission to be contacted by phone. The options are "Yes" and "No." If this question is answered "No," the participant's phone number will not be printed on WIC reports that normally display participant phone numbers, and the Automated Notification System for WIC Reminders (ANSWR) will not contact the participant with appointment reminder voice calls. If "No" is selected, a text message will be allowed.

5.13 "**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"
- "Phone Options." This field is mandatory if a phone type other than "No phone" or "Unknown" is selected. It indicates whether the phone number can receive voice calls, text messages, or both. Options are "Voice Only," "Text Only," and "Both Voice & Text."

5.14 "**WIC ANSWR Voice and Text**" section. This section contains checkboxes to indicate which phone number(s) and methods of contact the participant would like to receive appointment reminders by ANSWR. A check in the checkbox indicates that the client would like ANSWR to contact them by the selected method. ANSWR may contact one voice number and/or one text number and/or one email. A participant may be reminded by all three methods, but by each method only once.

For each participant phone number given:

- If the "Phone Options" field is "Voice Only" then the ANSWR "Voice" checkbox is enabled and may be checked and the "Text" checkbox is disabled and may not be checked.

- If the "Phone Options" field is "Text Only" then the "Text" checkbox is enabled and may be checked and the "Voice" checkbox is disabled and may not be checked.

- If the "Phone Options" field is "Both Voice & Text" then the "Voice" checkbox and the "Text" checkbox are enabled and either or both may be checked.

- If the "Phone Options" field has "Voice Only" or "Both Voice & Text" selected, the "Voice" checkbox will be defaulted to checked. If there is more than one "Voice Only" or "Both Voice & Text" phone type, the default hierarchy will be as follows: Cell Phone, Home, Cell Phone 2, Message, Work.

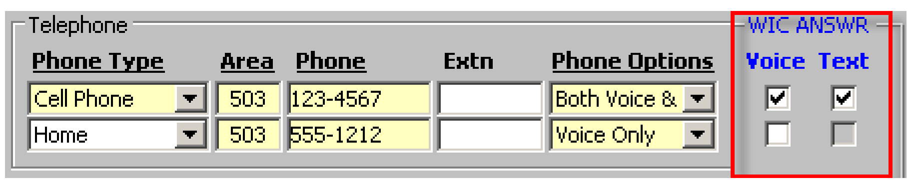

Figure 5: "WIC ANSWR Voice and Text" Checkboxes

5.15 "**Client E-mail**." A field to collect participant's email address. A valid E-mail address must contain a "local part" (e.g. participant name), an "@" symbol, and a "domain" (e.g. hotmail.com).

5.16 "**ANSWR E-mail"** checkbox: User may check this box if the participant wants an e-mail notification from ANSWR. This checkbox is disabled until an e-mail address is entered in the "Client Email" field and the user tabs over or clicks "Save."

Figure 6: "Client E-mail" Field and "WIC ANSWR E-mail" Checkbox

5.17 "**Guardian**" Section.
- The last, first and middle name of the participant'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.

5.18 "**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.

5.19 "**Ethnicity**" is a federal reporting requirement. Use the drop down list to select the participant's ethnicity.

5.20 "**Spoken Language**" will default to English. You can use the drop down list to select the participant's preferred spoken language.

5.21 "**Written Language**" will default to English. You can use the drop down list to select the participant's preferred written language.

5.22 "**Alt Format**." If the participant needs materials in an alternate format, this drop down list can be used to identify the participant's preferred format. Only one format can be chosen. If "other" is identified it should be explained in the "Messages" screen.

5.23 "**Medicaid #**." The participant's Medicaid number can be entered here if applicable.

5.24 "**SSN #**." The participant's Social Security Number can be entered here if known.

5.25 "**Deceased**" field will not be used for a new participant enrollment.

5.26 "**Deceased Date**" field will be left blank unless the participant is deceased.

6. **Click on the "AP Enroll Status" tab.**

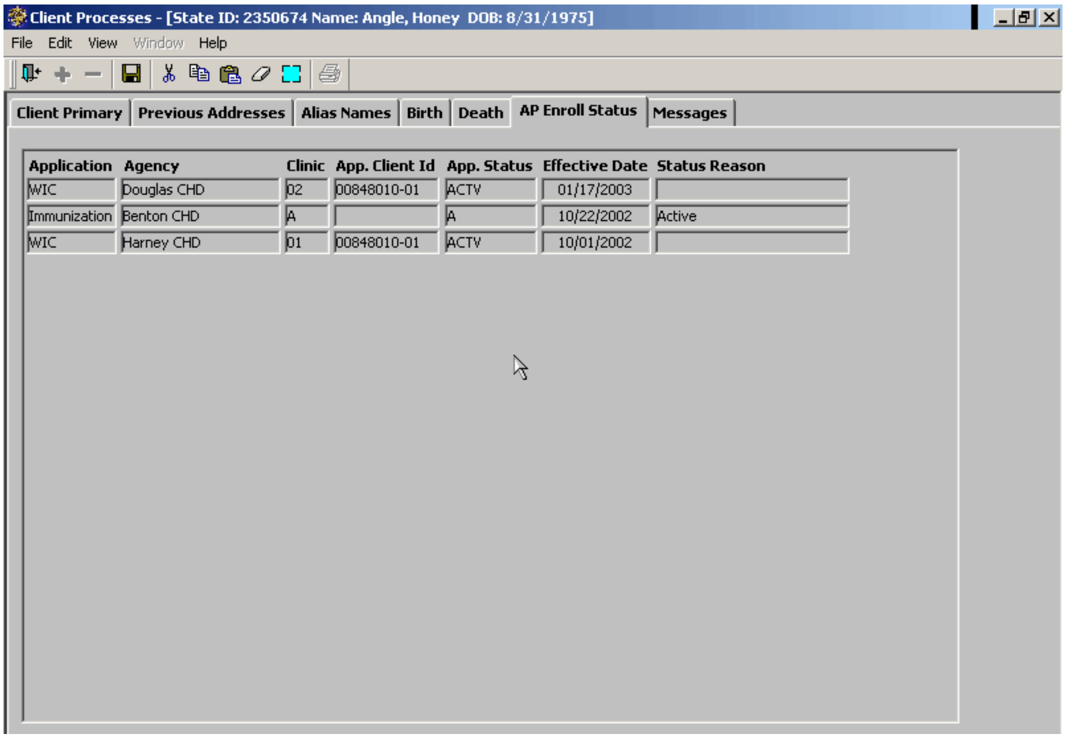

Figure 7: "AP Enroll Status" Screen

The information on this tab, application enrollment, is display only. It will show what other programs or applications the participant participates in the FamilyNet system, the agency, clinic, and current status. The information on this tab will be useful when participants transfer from one agency to another.

7. **Click on the "Messages" tab.**

   If you need to provide information about a participant that other staff should know, it would be entered on this screen.

8. **Click on the "Insert Record" icon and type a sample message.**

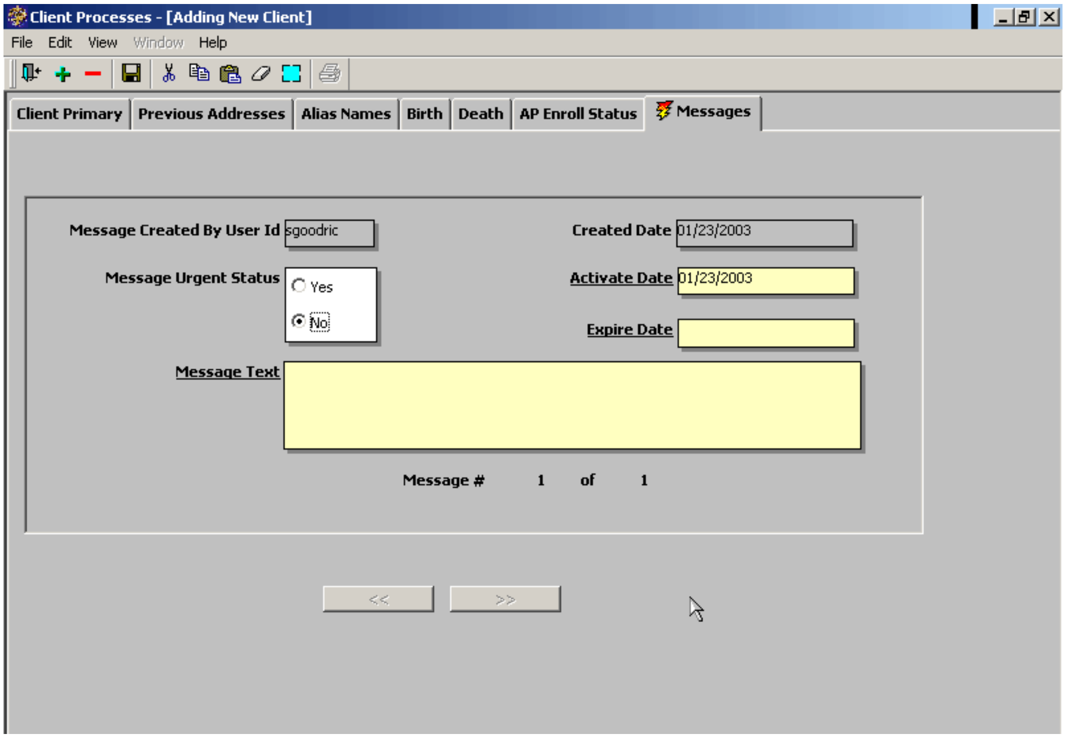

Figure 8: "Messages" Screen

- After a message has been entered and saved, a lightening 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 participant 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 participant’s last name into the “Last Name” field.
10. Enter the participant’s first name into the “First Name” field.
11. Enter the participant’s date of birth into the “Date of Birth” field.
12. Select the participant’s gender from the drop down list in the “Gender” field.
13. Enter the participant’s complete address information.
14. Enter the participant’s complete telephone information.
15. Indicate the participant’s ANSWR voice and text message appointment reminder preferences.
16. Enter the participant’s email address.
17. Indicate the participant’s ANSWR email message appointment reminder preference.
18. Enter the participant’s guardian’s name in the “Last Name” and “First Name” fields.
19. Select the guardian type from the drop down list in the “Type:” field.
20. Select the participant’s race from the drop down list in the “Race” field.
21. Select the participant’s ethnicity from the drop down list in the “Ethnicity” field.
22. Select the participant’s spoken language from the drop down list in the “Spoken Lang” field.
23. Select the participant’s written language from the drop down list in the “Written Lang” field.
24. Enter the participant’s Medicaid number in the “Medicaid #” field.
25. Enter the participant’s social security number in the “SSN” field.
26. Save.
27. Click the “Messages” tab.
28. Enter a message.
29. Save.
30. Click “Close.”

Changes and Additions to Client Demographics

Changes and additions to participant demographics will be made in the "Client Primary" screen. Generally, when changes are made to existing participant information, the old information is not retained. The exception to this is participant 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 participant's first name.**
6. **Click on the "Create Alias Name" box to now make the initial name entered an alias.**

Example: If the participant'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 participant in the database.

♫ NOTE: To change a participant's name without creating an alias, do not check the "Create Alias Name" box.

7. **Change the participant's date of birth.**

When a participant's date of birth has been changed, their date of birth will now appear in **bold** on the Client Search results, Intake Screen, Family Summary Screen, and all certification tabs.

♫ NOTE: Double-click on a bolded date of birth to see the "DOB Change History" pop-up window. This window will display the previous date of birth, the new date of birth, the date and time the date of birth was changed, and the name of the user who made the change.

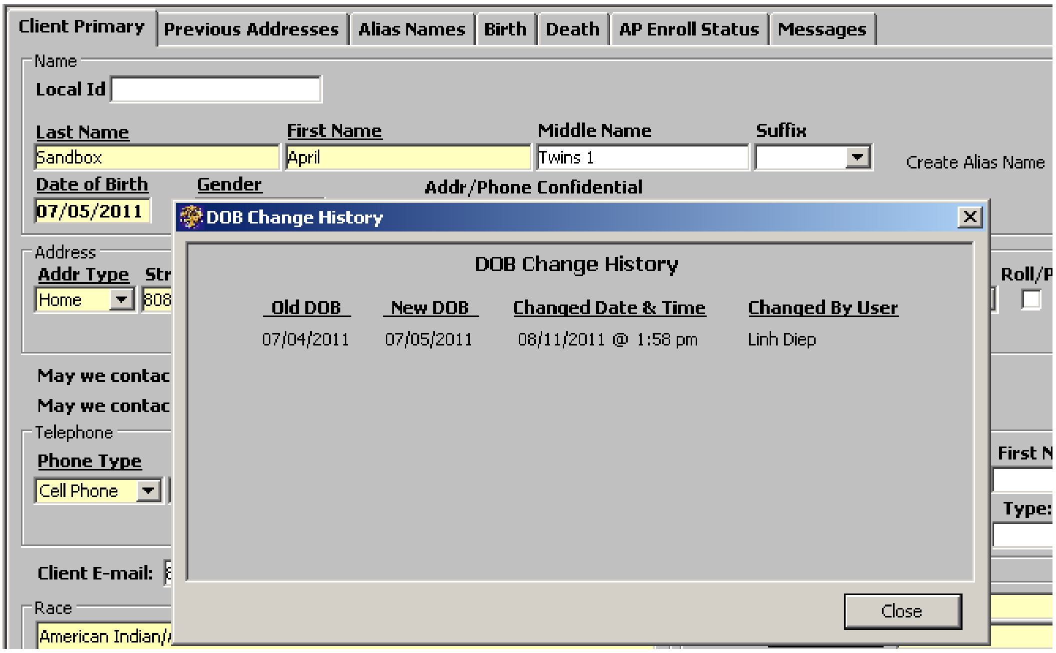

Figure 9: "DOB Change History" Pop-up

8. **Change the participant'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.

9. **Click on the "Roll/Prv" box.**

If you are updating a participant's address change information and you want to retain the participant'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.

10. **Click anywhere in the telephone section.**

11. **Click the insert icon to add another phone type and number.**

♫ NOTE: 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. This includes changes to the WIC ANSWR reminder message preferences.

♫ NOTE: When three or more phone numbers are entered, a scroll bar will appear to the right of the WIC ANSWR Voice and Text columns.

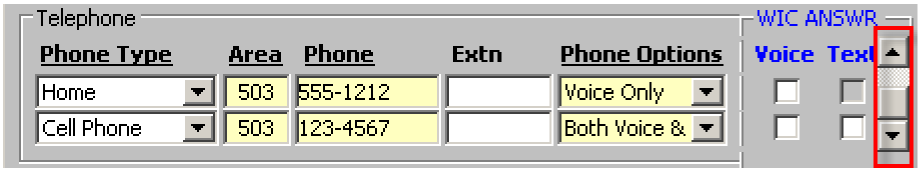

Figure 9: "Telephone" Section Scroll Bar

12. **Click Save.**

13. **Click on the "Previous Addresses" tab.**

This is display only and is linked back to the address fields on the "Client Primary" screen.

14. **Click on the "Alias Names" tab.**

This is where alias names for a participant 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.

15. **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.

16. **Click on the "Death" tab.**

This is another link to Vital Statistics. In a later phase of development, it will be functioning.

17. **Exit.**

✂ Tips and Shortcuts:

- An alias name is a search tool only and the system will show the participant'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 participant 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 participant to "Enrollment." Click no to close the pop-up and return to "Applicant Prescreen" without the participant.
- If you enter different spoken languages for different family members, the auto scheduler may have difficulty scheduling appointments together for that family.
- When a duplicate record is entered into the WIC application, type "Duplicate" in the first name field 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 participant 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 participant.
9. Change the participant's first name.
10. Click the "Create Alias Name" box.
11. Change the participant'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. Enter an additional phone type, number and phone option.
17. Check the appropriate boxes in the ANSWR section.
18. Change the participant's email address.

19. 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 participant’s demographic information into TWIST. Remember to search for the participant 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 participant;
- determine if a potential participant 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 participants for eligibility. In TWIST you can do this by entering or updating preliminary information on the potential participant 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 participant who is on the phone or is a walk-in. If the potential participant 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:

Income Eligibility

The starting point for this lesson is:

Client Processes ⇨ Enrollment & Intake ⇨ Applicant Prescreening

This window is divided into two sections.

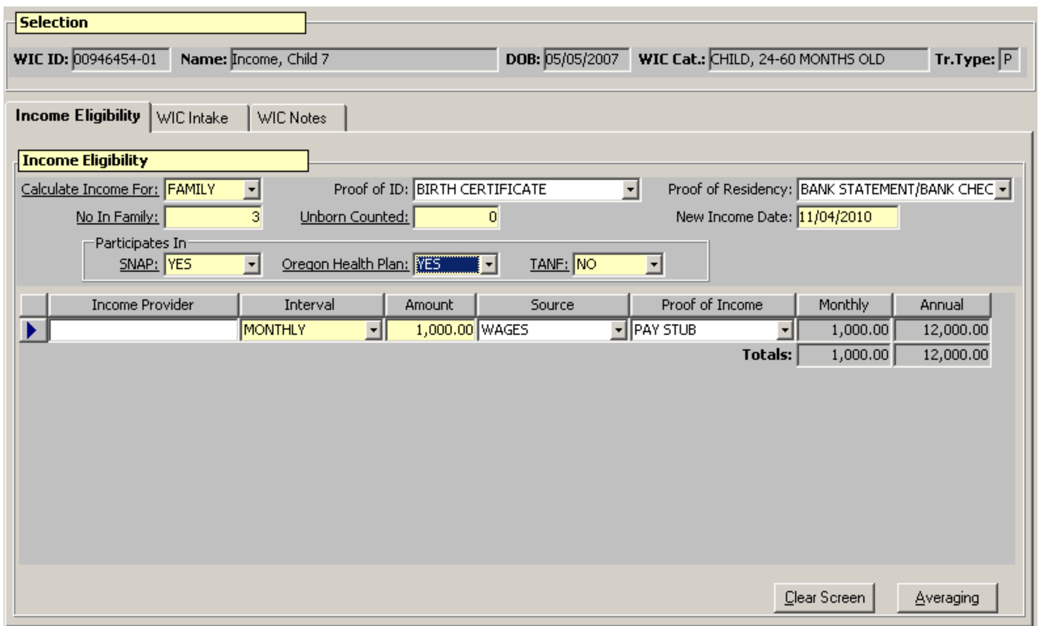

Figure 1: "Applicant Prescreening" Window

- 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 participant. To save information a participant 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 a foster child. Otherwise the income calculation will be applied to all WIC participants 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 "SNAP" 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: Selecting "Yes" for "**SNAP**," "**Oregon Health Plan**," or "**TANF**", indicates the participant reports participating in one of those programs. They may be adjunctively eligible.

♫ NOTE: All mandatory fields must be completed before moving on to the "**WIC Intake**" tab.

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.
- "**Every 2 Months**" calculates as 6 payments in one year .
- "**Every 2 Weeks**" calculates as 26 payments in one year.
- "**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 participant's work schedule.

Example: If a participant 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 participant's information. Refer to Termination/Eligibility lesson for printing WIC ineligibility letters.

- If the participant is over-income and pregnant go back to the "**Unborn Counted**" field and and make sure you have entered the number of babies she is carrying.
- If the participant 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 participant 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 participants 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.**

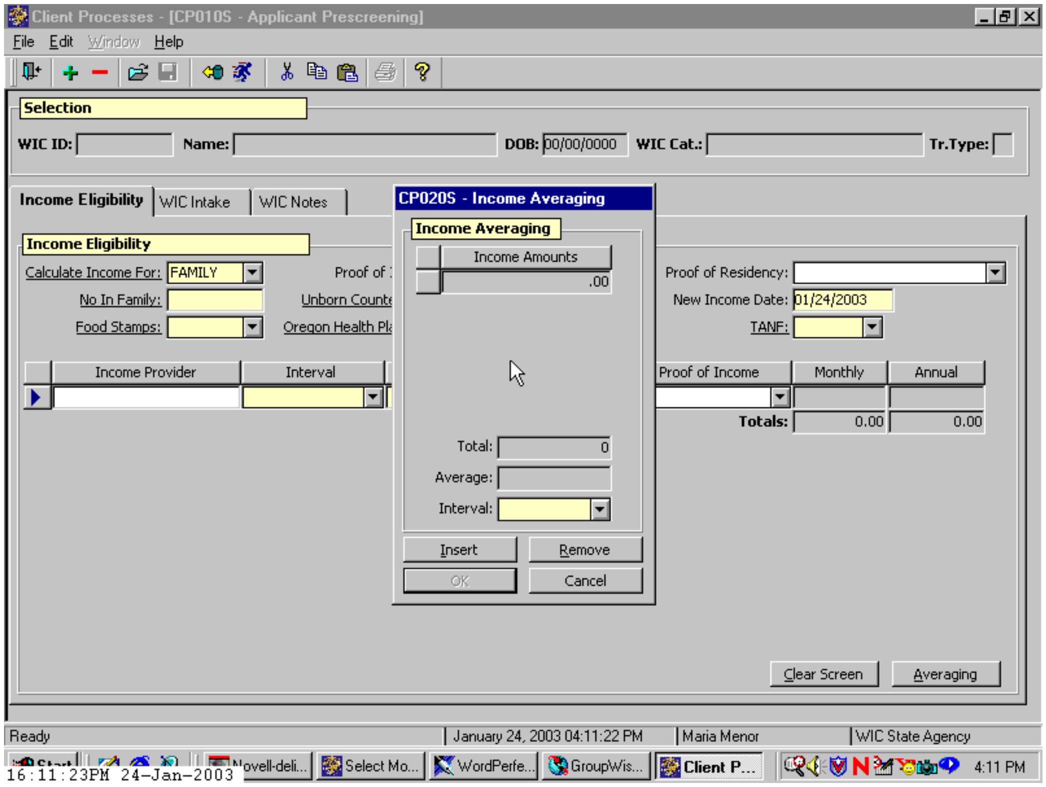

Figure 2: "Income Averaging" Pop-Up

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 participant has been selected.

➥ *Practice Activity #2:*

Use the information for the participant from your ☛ Activity Sheet for this practice. You will be screening a participant 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 participant whom you want to prescreen.**

   - The participant 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 participant.

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

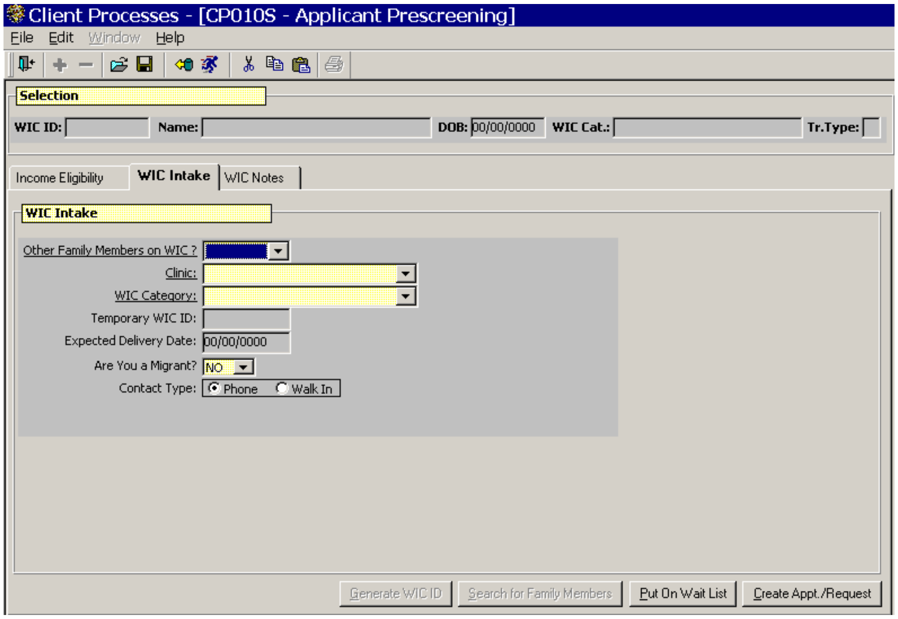

Figure 3: "WIC Intake" Screen

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.**

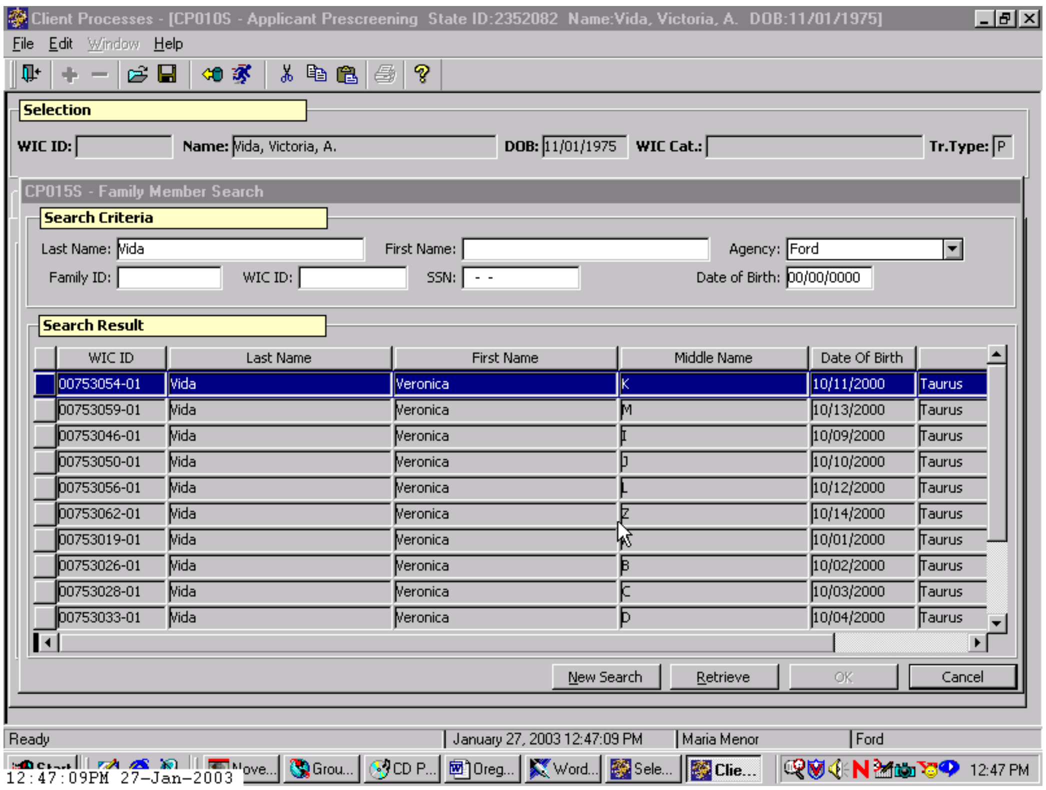

Figure 4: "Family Member Search" Pop-Up

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 participant'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 participant from the drop down list.**

   - If the participant 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:*

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 participant is not found, enter the participant'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 participant 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.**

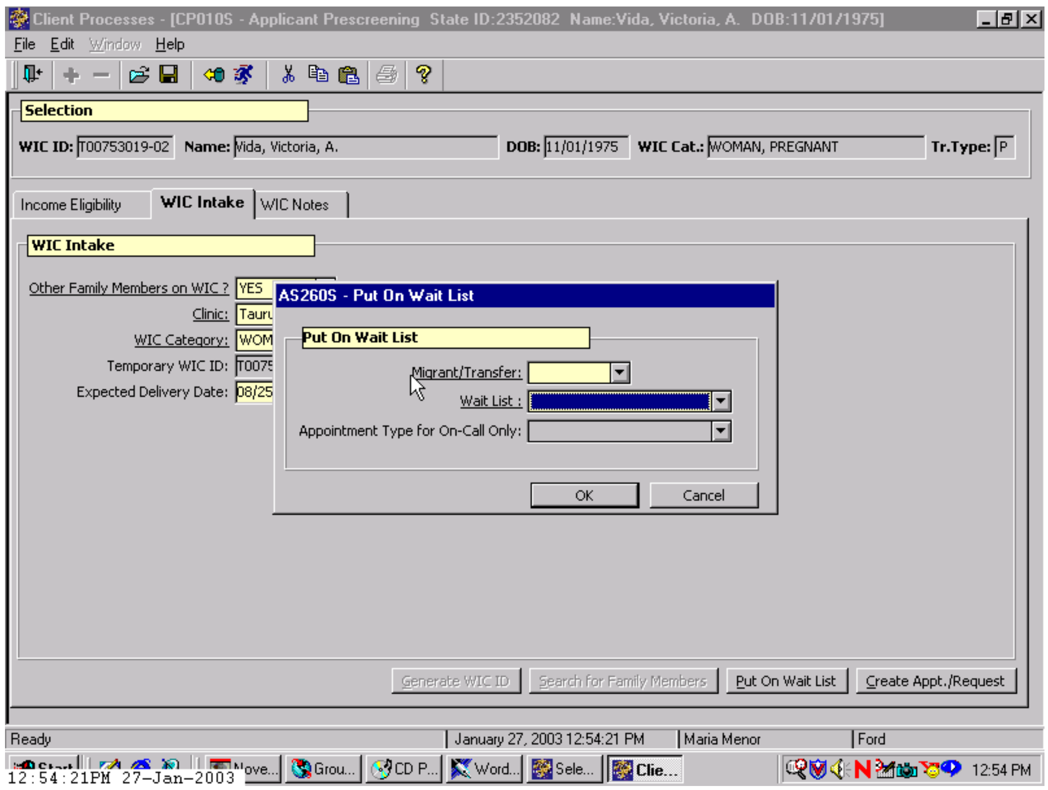

Figure 5: "Put on Wait List" Pop-Up

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 and add the applicant to the Wait List.**

   - Click "**Cance**l" 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:*

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.**

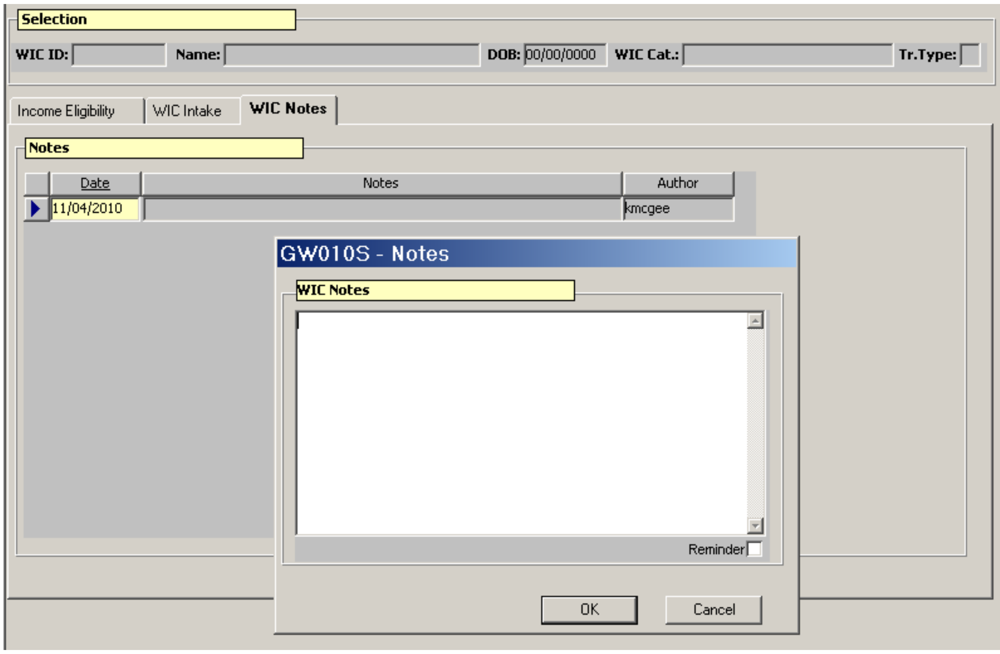

Figure 6: “WIC Notes” Screen

- 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:*

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 participant 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 participant calls on the phone to see if she qualifies for WIC. Complete her presceening. You will not need to schedule an appointment for her at this point in the training.

✍ *Notes:*

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Chapter 3: Client Processes
Section 1: Intake
Lesson: Producing a WIC ID Card

Objectives:

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

- produce and issue a WIC ID card.

Oregon Policies:

- ♦ 485 WIC Family Number and ID Card
- ♦ 540 Proxy System

Overview:

Producing and issuing a WIC ID card is a simple task and can be performed any time during a certification period after a WIC ID number has been generated.

Instruction:

Producing a WIC ID Card

The starting point for this lesson is:
Client Processes

1. **Select "Output" from the menu bar.**

2. **Select "Documents" and then select "WIC ID Card" from the drop down menu.**

   The "**WIC ID Card**" screen is displayed.

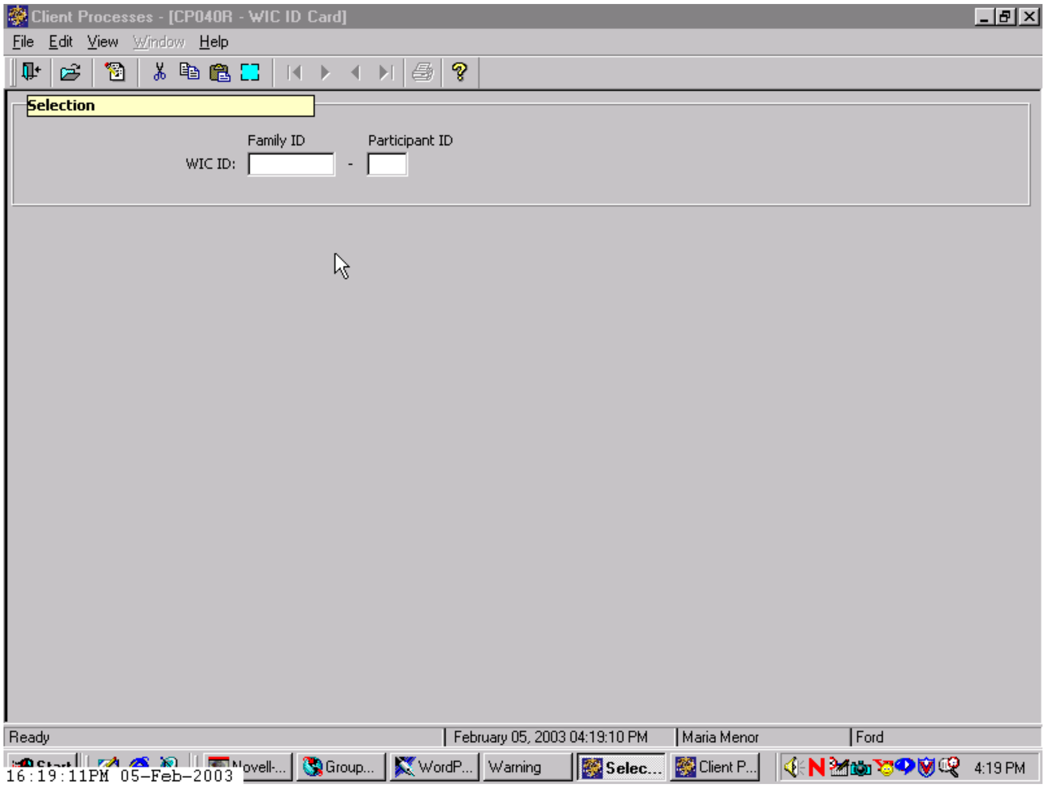

Figure 1: "WIC ID Card" Screen

3. **Enter the Family ID number in the "Family ID" field.**

   TWIST will allow a Family ID number of up to eight digits in this field.

4. **Tab to the "Participant ID" field and enter the two digit participant ID number.**

♫ NOTE: If you don't have the client's WIC ID handy you can also search "**Client Primary**" for information previously entered on the client and return to the "**WIC ID Card**" screen with the desired client.

5. **Click the "Print" icon.**

6. **Exit.**

Tips and Shortcuts:

- Once you complete a certification you can fast path from the "Food Package" tab in Certification to the "WIC ID Card" screen.

➥ Practice Activities:

Starting from the “Client Processes” module, complete the following steps using your ☛ Activity Sheet.

1. Click on “Output” on the menu bar.
2. Select “Documents.”
3. Select “WIC ID Card.”
4. Enter your Family ID number.
5. Tab to the “Participant ID” field and enter your client ID.
6. Click the “Print” icon.
7. Exit.

✓Skill Check:

Use your ☛ Activity Sheet to print another ID card.

Turn in both ID cards (from the Practice Activity and Skill Check) to the instructor.

✍ Notes:

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Chapter 3: Client Processes
Section 1: Intake
Lesson: Enrollment

Objectives:

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

- select the appropriate transaction types;
- complete the "Intake" function;
- identify and correctly fill in the "For Women Only" section;
- utilize the referrals button;
- document income information to meet voucher printing requirements; and
- change previously entered data.

Oregon Policies:

- ♦ 480 Voter Registration (Motor Voter)
- ♦ 590 Program Integrity: Participant Abuse
- ♦ 610 Required Proofs – Identity, Residency, Income
- ♦ 611 Income Eligibility: Determining Income Eligibility
- ♦ 612 Income Eligibility: Adjunct or Automatic Income Eligibility
- ♦ 613 Income Eligibility: What Counts as Income
- ♦ 614 Income Eligibility: Current Income Guidelines
- ♦ 615 Income Eligibility: Change in Income
- ♦ 616 Unavailable Proofs
- ♦ 635 Participant Notification: Eligibility and Rights & Responsibilities
- ♦ 640 Documentation Requirements for Certification in TWIST
- ♦ 655 Homeless Applicants
- ♦ 657 Migrant Workers: Definition

Overview:

This lesson covers how you will use TWIST to gather the information you need to check in a participant. You will learn how to enter or update the "Income Eligibility" and "WIC Intake" screens. In addition you will learn how these initial screens are the foundation for the certification process.

In Chapter 3, Lesson 100 *Applicant Prescreening* we reviewed the process for entering preliminary information on potential participants and creating a temporary WIC ID in order to create an appointment. In this lesson we will review what happens when a potential participant actually comes in for an appointment. At this point, the user will gather information from the applicant such as proof of residence, proof of income, referral information, etc.

Applicants do not have to be prescreened prior to the completion of “Enrollment.” However, any information entered in the “Applicant Prescreening” screen will be displayed in the “Enrollment” screen and may be modified. Additional information is also entered at this time to begin the certification process.

Instruction:

Updating or Entering Income Eligibility

As with “Applicant Prescreening” the “Enrollment” window is divided into two sections. The top part of the window is titled “Selection,” which is blank until you select a participant to enroll. If the participant has been prescreened the participant’s system-generated WIC ID will display. The “T” in the WIC ID will go away once the enrollment process for the participant is completed. The lower part of the “Enrollment” window is divided into three tabs and we will start with the first tab, “Income Eligibility.”

♫ NOTE: If the participant was prescreened, many fields will show information gathered during prescreening. You will only need to verify that the information is still current.

The starting point for this section is:

Client Processes ⇨ Enrollment and Intake ⇨ Enrollment

1. **Search “Client Primary” for information previously entered on the participant and return to the “Enrollment” screen with the desired participant (if found).**

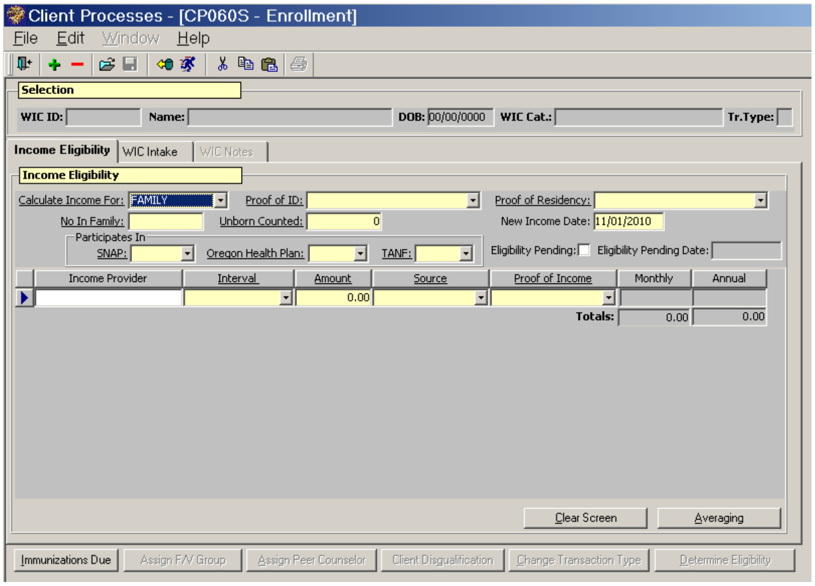

Figure 1: “Income Eligibility” Screen

“Income Eligibility” Fields

2. **Select “Family” or “Client” for “Calculate Income for”.**

♫ NOTE: “Client” is only selected for foster children in state custody. They are considered a household of one. For all other situations use the default of “Family” when determining income.

- Changing from “**Client**” to “**Family**” will generate a system warning that all previous income information entered will be lost when existing family income is retrieved.

3. **On the “No. in Family” field, enter the number of family members.**

4. **On the “Unborn Counted” field, enter the number of babies being carried by a pregnant woman.**

♫ NOTE: TWIST adds the “**No. in Family**” and “**Unborn Counted**” to calculate total number in family when determining income.

5. **On the “Proof of Residency” field, select the type of proof provided.**

6. **On the “Proof of ID” field, select the type of proof provided.**

♫ NOTE: The “**New Income Date**” field is system-generated and automatically defaults to today’s date. Whenever changes are made to the screen the system will automatically update this field.

7. **On the “SNAP” field, select yes or no from the drop down list.**

8. **On the “Oregon Health Plan” field, select yes or no from the drop down list.**

9. **On the “TANF” field, select yes or no from the drop down list.**

♫ NOTE: Selecting “Yes” for “**SNAP**,” “**Oregon Health Plan**,” or “**TANF**”, indicates the participant reports participating in one of those programs. They may be adjunctively eligible.

10. **Check the “Elig Pending” check box if the participant did not bring proof of ID, residency or income.**

- If the "**Elig Pending**" box is checked, the participant will receive only one month of FIs, and the "**Elig Pending Date**" will be automatically populated with the current date.
- If the required proof is not documented within 30 days and the check mark is not removed from the "**Elig Pending**" box TWIST will automatically terminate the participant.
- If the terminated participant returns later with acceptable proof the participant may be re-activated for the certification period beginning the month the FIs were initially provided.

11. **On the "Income Provider" field, identify who in the family provides this income.**

12. **On the "Interval" field, select the income interval from the drop down list.**

13. **On the "Amount" field, enter the amount of income the participant receives for this interval.**

    - TWIST determines income eligibility automatically once the "Amount" field is complete.
    - 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?*"
    - You may select "Yes" to print the notice and close the pop-up or "No" to close the pop-up without printing the notice.
    - If the amount of income entered exceeds most annual incomes, a message is displayed stating "*$xxx,xxx is an unusually high amount of annual income for any income source. Please verify the amount and interval for row #.*"
    - If the participant is income eligible, nothing will appear and you may continue.

14. **On the "Source" field, select the source of the income from the drop down list.**

15. **On the "Proof of Income" field, select the proof of income from the drop down list.**

    - Selecting a proof of income from one of the four programs that provide adjunctive eligibility (SNAP, Oregon Health Plan, TANF, or FDPIR) will allow the income amount to exceed the guidelines for the household.

16. **Press Tab to create another line to enter additional income.**

- TWIST automatically calculates the monthly and annual salary amounts based on the information you entered for each line.
- Cumulative totals are also calculated for all lines and displayed in the "**Totals**" fields.
- If "**Hourly**" is selected as the interval TWIST calculates for a 40-hour workweek. If income is based on less than a 40 hours per week average, use "**Monthly**".

17. **Click the "Save" icon to save the income information for the participant.**

♫ NOTE: The "**Clear Screen**" button in the lower right hand corner will remove all information on the screen.

♫ NOTE: The "**Averaging**" button opens the "**Income Averaging**" pop-up. Please refer to Chapter 3, Lesson 100 *Applicant Prescreening* for information on completing this pop-up.

You have completed income eligibility and are now ready to move on to the "**WIC Intake**" screen. TWIST will automatically save your work when you move to the next tab.

Entering and Updating WIC Intake

The starting point for this section is:

Client Processes ⇨ Enrollment and Intake ⇨ Enrollment

♫ NOTE: If the participant was prescreened, you will only need to verify that the information is still current; however, you will have other fields to complete as well.

"WIC Intake" Fields

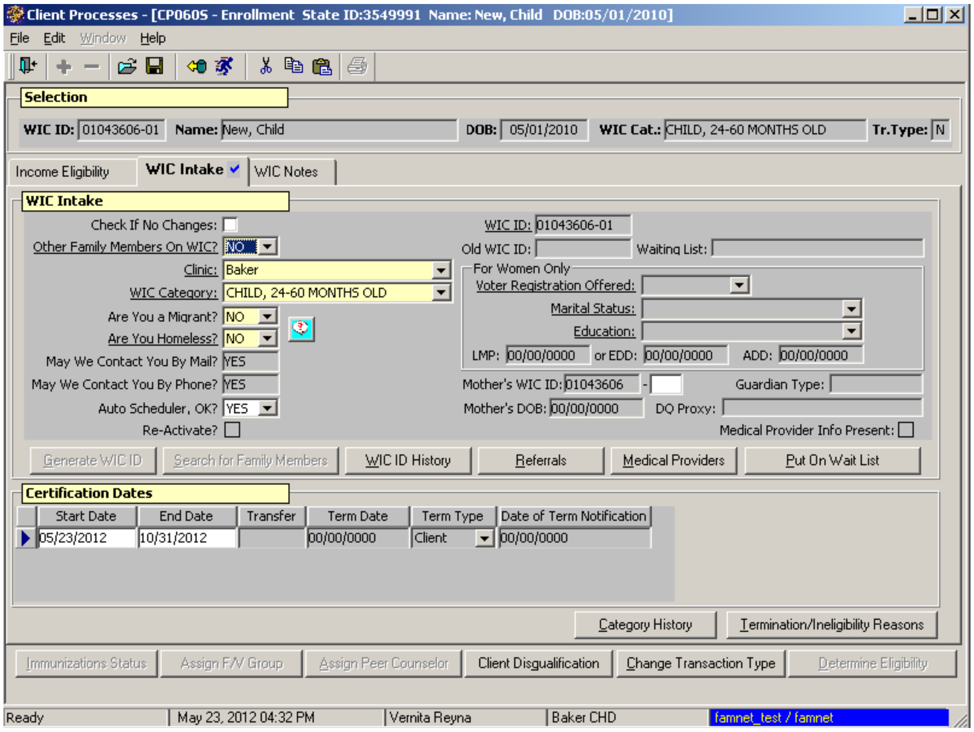

Figure 2: "WIC Intake" Screen

1. **The "Check If No Changes" box can be checked if a participant is being recertified and no changes are needed.**

   - The box cannot be used for an initial certification.

2. **Select yes or no from the drop down list on the "Other Family Members on WIC?" field.**

3. **Select the appropriate clinic using the drop down arrow on the "Clinic" field.**

4. **Select the correct category using the drop down arrow on the "WIC Category" field.**

♫ NOTE: Click the "Question Mark" button to the right of the "Are You a Migrant?" field. A pop-up is displayed with the definitions for migrant and homeless.

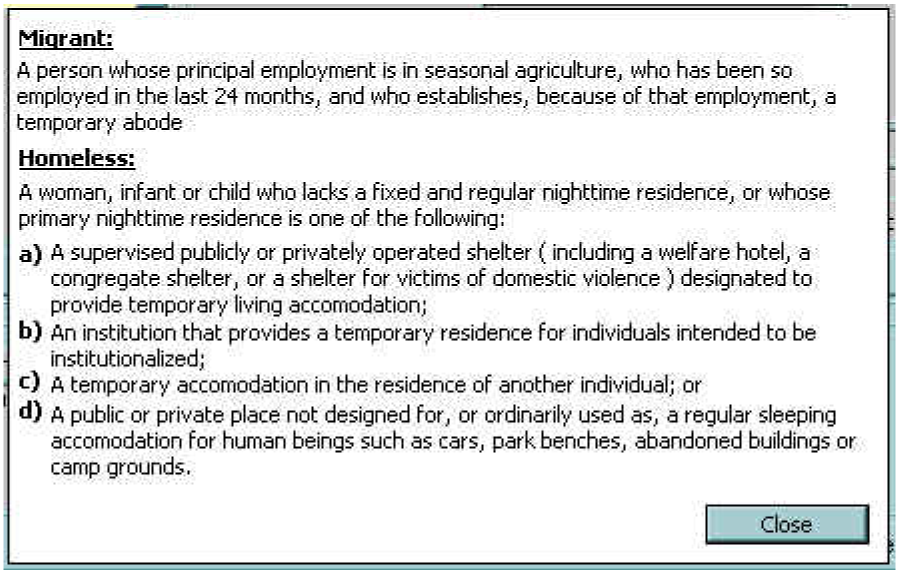

Figure 3: “Migrant & Homeless Definitions” Pop-Up

5. **Click the “Close” button to close the pop-up**

6. **Select the appropriate answer using the drop down arrow on the “Are You a Migrant?” field.**

7. **Select the appropriate answer using the drop down arrow on the “Are You Homeless?” field.**

♫ NOTE: Selecting “yes” in either of these fields will generate the appropriate nutrition risk for this participant and also will allow the participant to choose the homeless food package.

8. **The “May We Contact You By Mail?” field displays information gathered on the “Client Master” screen.**

9. **The “May We Contact You By Phone?” field displays information gathered on the “Client Master” screen.**

10. **Select yes or no from the drop down list on the “Auto Scheduler, OK?” field.**

    - This field defaults to “**Yes**”.
    - Selecting “**No**” prevents Auto Scheduler from automatically scheduling the participant.

♫ NOTE: If your agency is not using the Auto Scheduler then you should always select “No” for this field.

♫ NOTE: TWIST will automatically fill the "**Re-Activate?**" box if the "**Re-activation**" transaction type is selected. You will learn more about transaction types in Chapter 3, Lesson 800 *Change Transaction Types*.

♫ NOTE: The "**Waiting List**" field is display only and will be populated after you complete the "**Put on Wait List**" pop-up as necessary. The waiting list function is covered in a separate lesson.

11. **Select the appropriate answer from the drop down list for the following information in the "For Women Only" Box if the participant is a woman.**

    11.1 Voter Registration Offered

    - "**Yes**" = Voter Registration was offered to participant (regardless of whether they registered, were previously registered, or elected not to register).
    - "**No**" = Voter Registration was not offered (forgot to do it).
    - "**Not applicable**" = Participant not eligible to vote (known non-citizen, woman under 18 years).

    11.2 Marital Status

    11.3 Education

    11.4 **LMP** or **EDD** field if the participant is a pregnant woman.

♫ NOTE: If you enter the LMP, TWIST will calculate the EDD for you, or *vice versa*.

    11.5 Enter the appropriate date in the "**ADD**" (Actual Delivery Date) field if the participant is a Breastfeeding or Postpartum woman.

    - Certification End Date will be calculated from these fields.

♫ NOTE: LMP or EDD will be reflected in the Medical Data box of the "**Woman Certificatio**n" screen where this information is mandatory.

12. **Enter the last two digits of the mother's ID number in the second box of the "Mother's WIC ID" field.**

    - The field will be enabled once you save the participant's info and then only if the participant is an infant or child.
    - The system will complete the first box with the mother's "Family ID" number.

- Entering the mother's ID number will establish a link between infant or child and mother.
- "Mother's DOB" field will be populated by the system once the mother's ID number has been entered.

"WIC Intake" Buttons

13. **Click the "Generate WIC ID" button, if it is enabled, to generate a WIC ID number.**

- If the participant has been prescreened a temporary ID number will have been generated in the "Applicant Prescreening" function.
- TWIST will remove the "T" from a temporary ID number generated in the "Applicant Prescreening" function once the "Enrollment" screen is saved.
- The "WIC ID" field will display the current WIC ID number.
- The "Old WIC ID" field will display the old WIC ID if applicable.

♫ NOTE: The "**Search for Family Members**" button is enabled only if other family members are on WIC. Information on the "Search for Family Members" button can be found in Chapter 3, Lesson 100 *Applicant Prescreening*.

- When a participant has a different address and/or phone number than the family it has been linked to, a message will automatically pop-up requesting which address or phone profile to use.

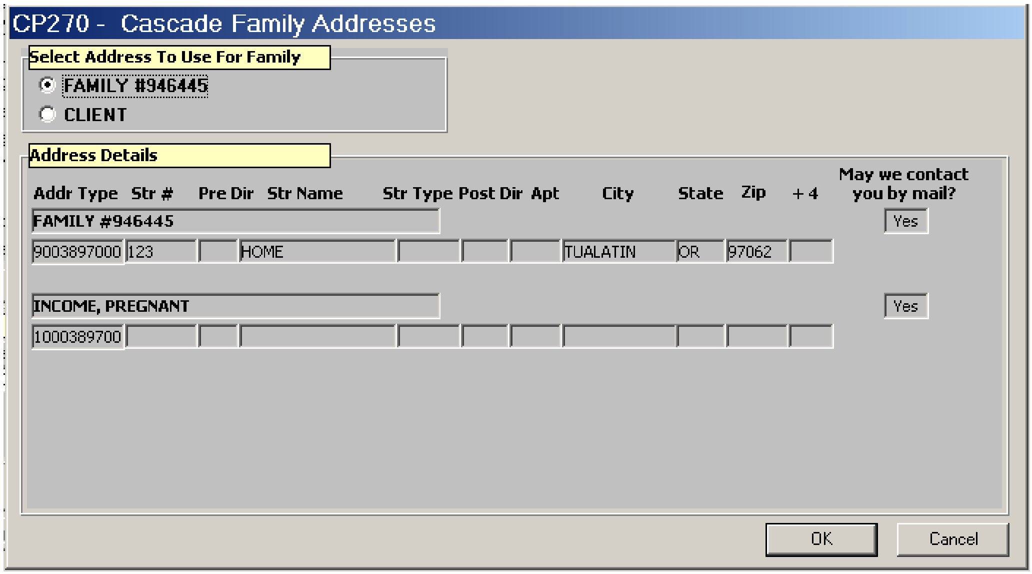

Figure 4: "Cascade Family Addresses" Pop-Up

- To change the participant's address to match the family address, select the "**Family #**" button in the "**Select Address to User for Family**" section.
- To keep the participant's address different from the other family members, select the "**Client**" button.
- The "**Address Details**" section lists the Client and Family # addresses. Click "**OK**" to close the pop-up.

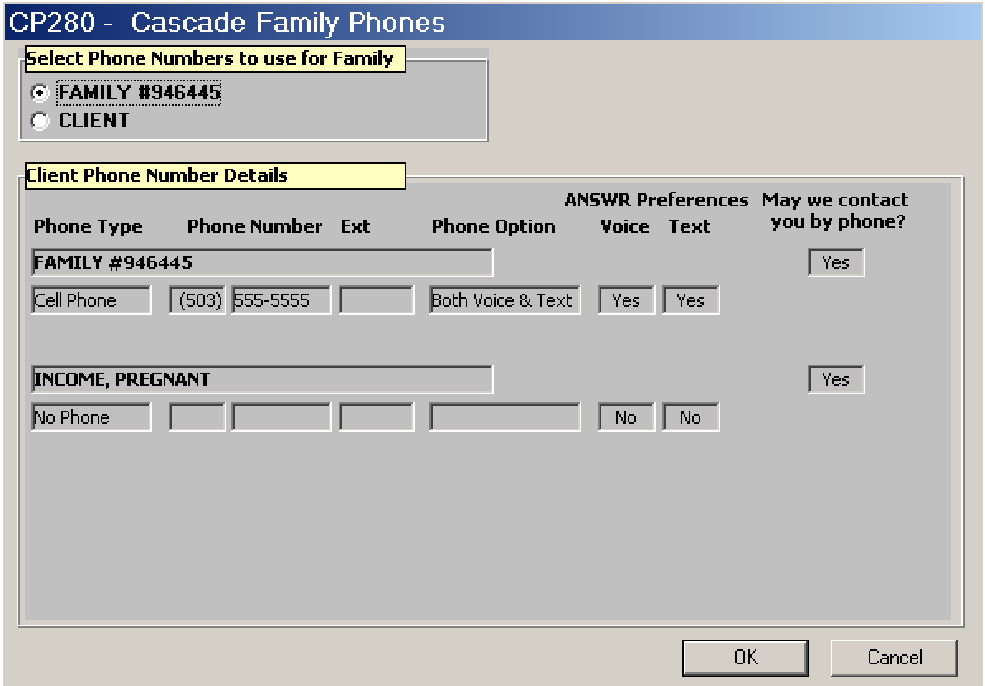

Figure 5: "Cascade Family Phones" Pop-Up

- To change the participant's phone profile to match the family phone profile, select the "**Family #**" button in the "**Select Phone Numbers to use for Family**" section.
- To keep the participant's phone profile different from the other family members, select the "**Client**" button.
- The "**Client Phone Number Details**" section lists the Client and Family # phone profiles. Click "**OK**" to close the pop-up.

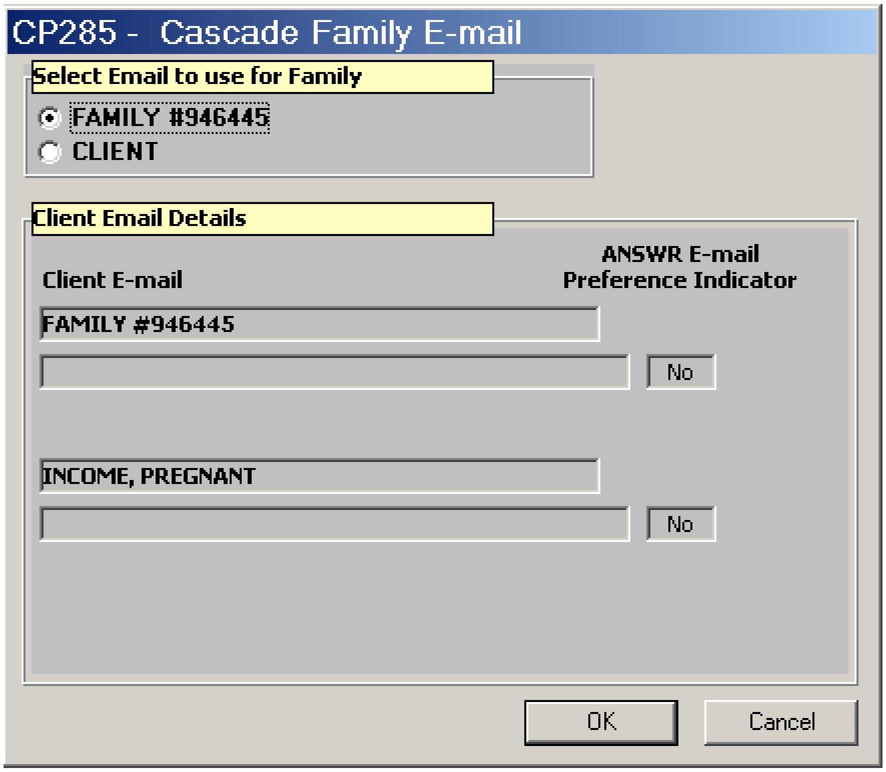

Figure 6: "Cascade Family E-mail" Pop-Up

- To change the participant's email address to match the family email address, select the "**Family #**" button in the "**Select Email to use for Family**" section.
- To keep the participant's email address different from the other family members, select the "**Client**" button.
- The "**Client Email Details**" section lists the Client and Family # email addresses. Click "**OK**" to close the pop-up.
-

14. **Click the "WIC ID History" button to open the pop-up.**

Figure 7: "WIC ID History" Pop-Up

- All old ID number information will be displayed.

♫ NOTE: See Chapter 3, Lesson 808 *Foster Families and Custody Changes* for information on changing a participant's WIC ID number.

15. **Close the pop-up.**

16. **Click the "Referrals" button to open the "Referrals from WIC" pop-up.**

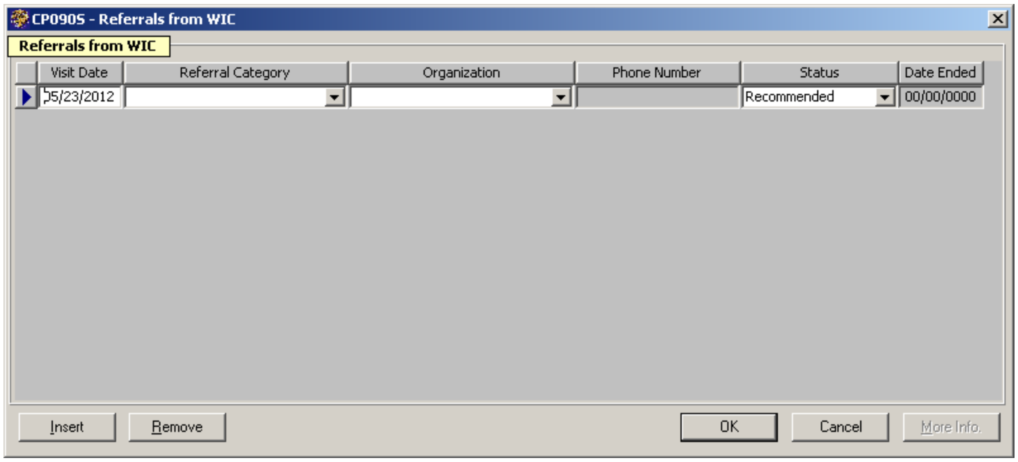

Figure 8: "Referrals from WIC" Pop-Up

- This pop-up is used to document referrals offered or provided to the participant.
- "**Referral Category**" is used to indicate the type of referral being made.

- “**Organization**” is used to indicate the name of the referral organization.
- “**Phone Number**” displays contact information for the referral organization.
- “**Status**” indicates the referral status.
- The “**Insert**” button in the lower left hand corner can be used to create additional rows.
- The “**Remove**” button can be used to remove a row.

17. **Click “OK” to close the pop-up and save your changes.**

Clicking “**Cancel**” will close the pop-up without saving the information.

18. **Click the “Medical Providers” button to open the “Medical Providers” pop-up.**

Figure 9: “Medical Providers” Pop-Up

- “**Doctor’s Name**” is used to enter the medical provider’s name.
- “**Phone**” is used to enter medical provider’s phone.
- The “**Insert**” button in the lower left hand corner is used to enter additional doctor’s information.
- The “**Remove**” button is used to remove a row.

19. **Click “OK” to close the pop-up and save your changes.**

- The "**Medical Provider Info Present**" box will be checked once information has been entered in the "**Medical Providers**" pop-up.
- Clicking "**Cancel**" will close the pop-up without saving the information.

➥ *Practice Activity #1:*

The starting point for this section is:

Client Processes ⇨ Enrollment and Intake ⇨ Enrollment

1. Click on the "WIC Intake" tab to access the "WIC Intake" screen.
2. Review the information on the screen and verify/change the following information:
   "Other Family on WIC?" – **No**
   "Are you a Migrant?" – **No**
   "Are you Homeless?" – **No**
   "Auto Scheduler, OK" – **Yes**
   "Voter Registration Offered" – **Yes**
   "Marital Status" – **Unmarried**
   "Education" – **High School Diploma**
   "EDD" – **3 months from today's date**.
3. Save the updated information.
4. Open the "Referrals from WIC" pop-up and enter **Health Department Programs** in the "Referral Category."
5. Click "OK" to close the pop-up.
6. Open the "Medical Providers" pop-up and enter **your doctor's name and phone number**.
7. Click "OK" to close the pop-up.

Reviewing "Certification Dates" Section

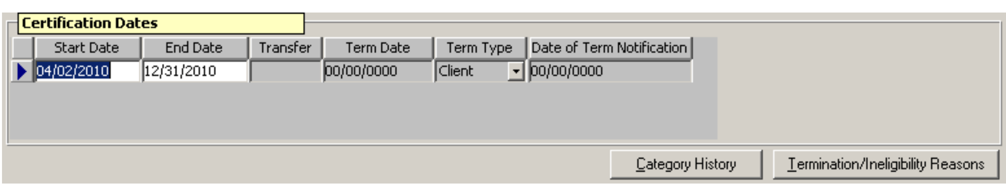

Figure 10: "Certification Dates" Pop-Up

♫ NOTE: TWIST will allow the "**Start Date**" and the "**End Date**" to be modified within 30 days of the original entries.

- The "Start Date" for new enrollments will be system generated as today's date.

- The system will calculate and display the "End Date" based on the start date, the category, the EDD, or the ADD.

1. **Click the "Category History" button to open the "Category History" pop-up.**

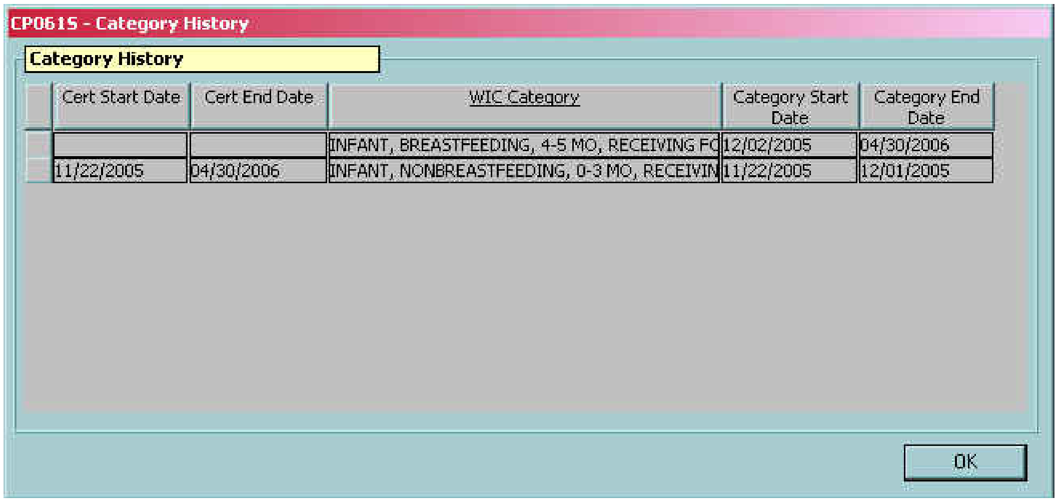

Figure 11: "Category History" Pop-Up

- This pop-up will display the "**WIC Category**" entered above as well as any other WIC categories the participant had been previously assigned, if applicable.

2. **Click "OK" to close the pop-up.**

3. **View the next four fields which are system-generated.**

- If the participant has been transferred the "**Transfer**" field displays that information.
- If the participant has been terminated the "**Term Date**" field displays the date the participant was terminated.
- The "**Term Type**" field indicates whether the participant or entire family was terminated.
- The "**Date of Term Notification**" will be automatically filled by TWIST once a Termination notice is printed for a participant.

4. **Click the "Termination / Ineligibility Reasons" button to open the "Ineligibility / Termination Reasons" pop-up.**

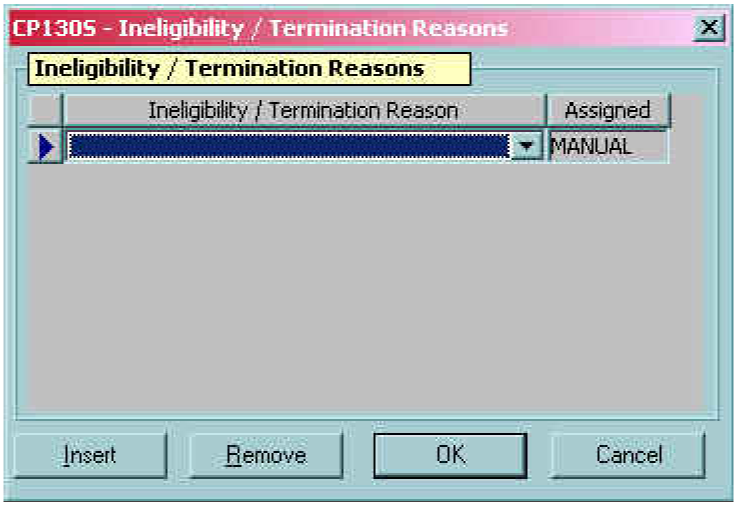

Figure 12: "Ineligibility / Termination Reasons" Pop-Up

- This screen displays system-generated reasons for ineligibility or termination.
- Click the "**Insert**" button in the lower left hand corner to enter additional reasons.

♫ NOTE: Learn more about termination and ineligibility in Chapter 3, Lesson 805, Terminations/Ineligibles.

5. **Click "OK" to close the pop-up and save your changes.**

   - Clicking "**Cancel**" will close the pop-up without saving the information.

6. **Click the "Change Transaction Type" button to open the "Select Transaction Type" pop-up.**

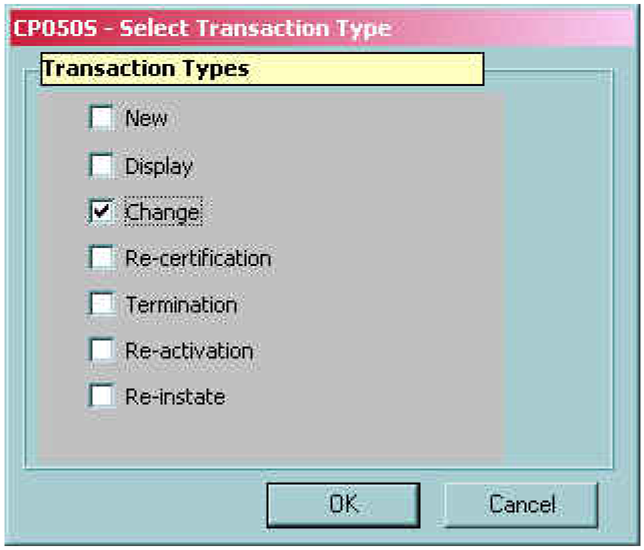

Figure 13: "Select Transaction Type" Pop-Up

6.1 **New** – this is automatically generated for a participant who does not have a WIC record.

6.2 **Display** – this type will be used if the user wants to "view" a record without making changes.

6.3 **Change** – this type is used when any change is needed.

6.4 **Recertification** – this is auto-generated if a participant's recertification is due. However, it can be selected manually. See Chapter 3, Lesson 700, Recertification.

6.5 **Reinstate** – this type is used when the participant is terminated and more than 30 days past the certification end date. See Chapter 3, Lesson 801, Reactivate and Reinstate.

6.6 **Termination** – this type is chosen if a user needs to manually terminate a participant.

6.7 **Re-activation** – this type is used to re-activate a participant who was terminated but is still within their certification period. See Chapter 3, Lesson 801, Reactivate and Reinstate.

7. **Click "OK" to save the transaction selection and close the pop-up.**

- Clicking "**Cancel**" will close the pop-up without saving your selection.

8. **Click the "Client Disqualification" button to open the "Client Disqualification" pop-up.**

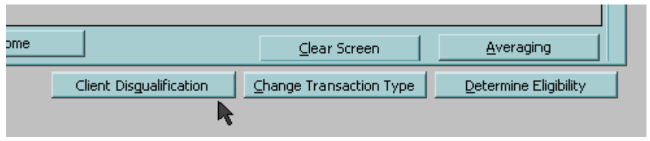

Figure 14: "Client Disqualification" Button

- The "**Client Disqualification**" button is present on all enrollment screens.
- This screen displays State-entered disqualification data and proxy-in-lieu-of-disqualification information. This pop-up is "display only" for Local Agency users. Please see Policy 590 *Participant Violations* for more information.

♫ NOTE: The fields will contain data only if the participant is or was in a period of disqualification.

♫ NOTE: If the participant is in a state of disqualification, the system will generate an error if the user attempts to change the transaction type.

- If a participant is currently disqualified and has a proxy-in-lieu-of-disqualification (someone obtaining services for the participant), the "Assigned Proxy" field will turn red and be populated with the proxy's name.

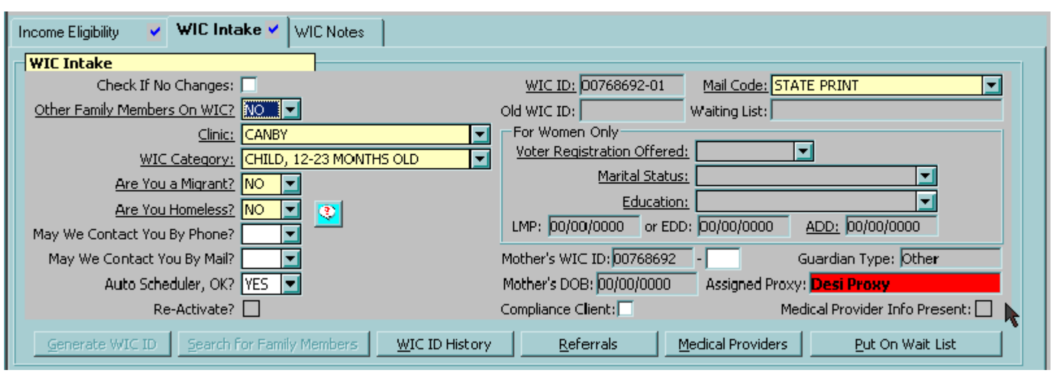

Figure 15: "Assigned Proxy" Field

"Disqualification Data" Fields

- These fields contain information about current and past disqualifications.

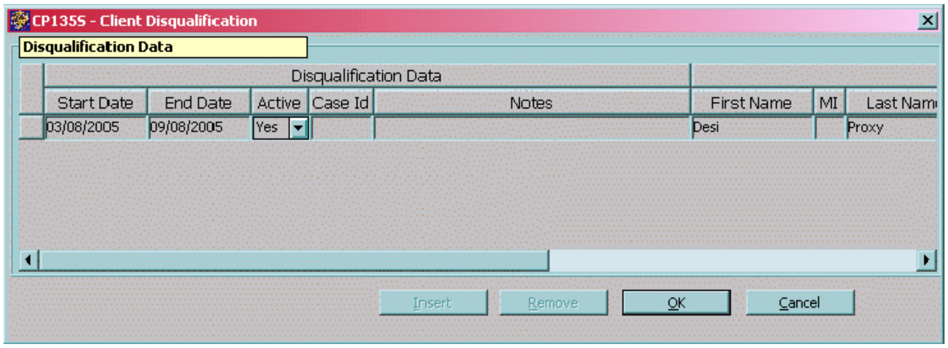

Figure 16: "Client Disqualification" Pop-Up (Disqualification Data)

8.1 **Start Date** – beginning of the disqualification period.

8.2 **End Date** – end of the disqualification period.

8.3 **Active** – if "Yes" a disqualification is in effect and participant is not able to receive services; if "No" disqualification could be going through an appeal, payment plan, or exception and participant is able to receive services.

8.4 **Case Id** – investigation file number.

8.5 **Notes** – any notes relevant to the disqualification.

"Proxy Info" Fields

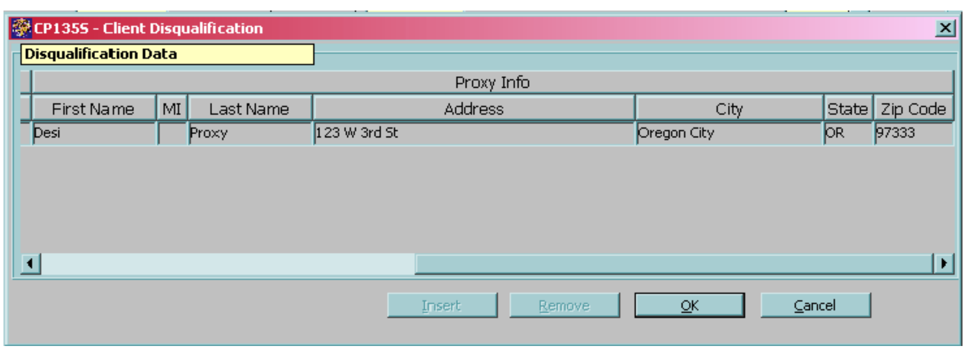

Figure 17: "Client Disqualification" Pop-Up (Proxy Info)

- These fields contain name and address information for the proxy-in-lieu-of-disqualification.

9. **Click "OK" to close the "Client Disqualification" pop-up.**

♫ NOTE: The "**Determine Eligibility**" button is present on all enrollment and certification screens but is not enabled until a certification is complete. For more information please refer to Chapter 3 Lesson 200 *Certification Overview*.

10. The "Assign Peer Counselor" button appears at the bottom of all enrollment screens but is only enabled for women participants. After a peer counselor has been assigned, "PC Status: Active" will display on the title bar following the participant's name and date of birth. When a woman is no longer participating in the peer counselor program, the status will be "Inactive". For more information please refer to Chapter 3 Lesson 103 *Breastfeeding Peer Counselor Assignment.*

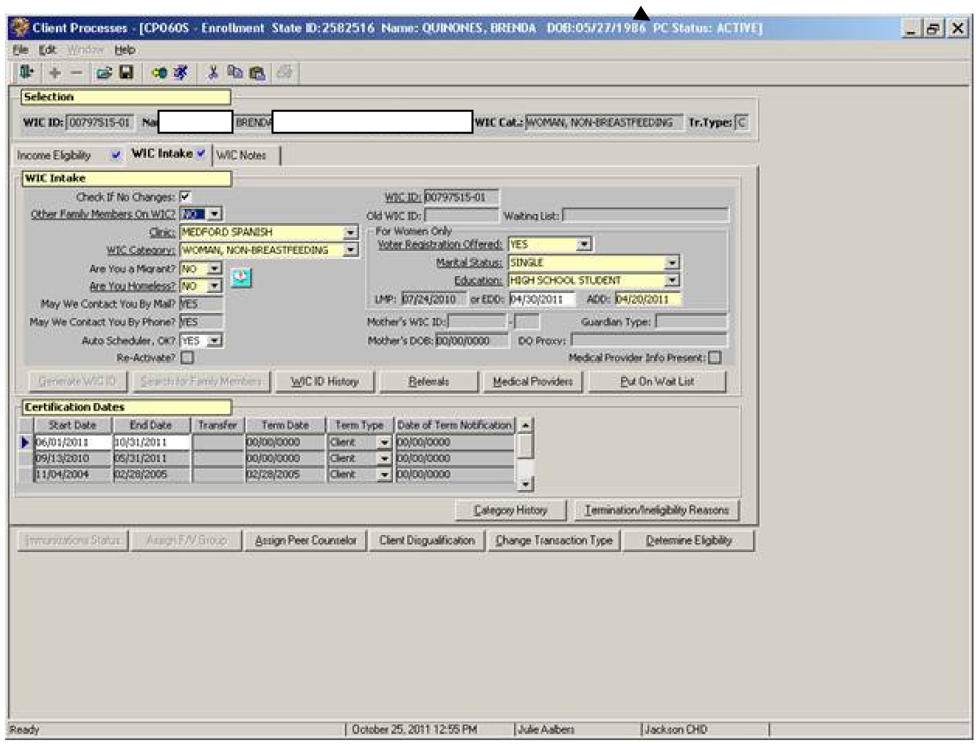

Figure 18: "WIC Intake" PC Status in Title Bar

Entering a WIC Note

The next tab is "**WIC Notes**." Please refer to Chapter 3, Lesson 100 *Applicant Prescreening* for information about this tab. Entering information in this tab is optional.

➥ *Practice Activity #2:*

The starting point for this section is:

Client Processes ⇨ Enrollment and Intake ⇨ Enrollment

1. Click on the “WIC Notes” tab to access the “WIC Notes” screen.
2. Double click in the “Notes” field and enter a short note.
3. Click the “Reminder” box.
4. Click “OK” to close the pop-up.
5. Save your work and exit.

✓Skill Check:

Your participant comes back for her appointment. Access her previously entered information and complete her “WIC Enrollment” screens with the following information.

She is not a migrant or homeless.
She was referred to WIC by the Oregon Food Bank.
Her doctor is Samuel Blue, 503-993-2201.
She has a high school diploma.
She does not want to register to vote.
She does not want to be Auto Scheduled for an appointment.

✂ Tips and Shortcuts:

- Tabs can be completed in any order.
- Once you complete a tab you may save the information manually or TWIST automatically saves the information once you move to the next tab. A blue check mark appears on each tab once the information has been entered and manually or automatically saved.

✍ Notes

Chapter 3: Participant Processes
Section 1: Intake
Lesson: Breastfeeding Peer Counselor Assignment

Objectives:

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

- use the “Assign Peer Counselor” function;
- modify information in the “Assign Peer Counselor” screen;
- assign a peer counselor to a participant that has had a peer counselor with a previous baby;
- inactivate a participant in the breastfeeding peer counseling program; and,
- print peer counseling reports.

Oregon Policies:

♦ 718 Breastfeeding Peer Counseling: Job Parameters, Protocol and Scope of Practice

Overview:

This lesson covers how you will use TWIST to assign a Breastfeeding Peer Counselor to a WIC participant who is pregnant and has indicated that she would like to have a Breastfeeding Peer Counselor. You will learn how to enter and update data in the “Assign Peer Counselor” screen. You will learn the impact this screen and fields have on the reports that Breastfeeding Peer Counselors, Coordinators and State WIC Staff use, and you will learn how to print a Peer Counseling report.

♫ NOTE: Once a participant has been assigned to a peer counselor in TWIST, a schedule of calls is available in the report “PC Schedule for Participant Contacts”. See the last section of this lesson on running Peer Counseling Reports.

Instruction:

Entering or Updating the Peer Counselor Assignment

The starting point for this section is:

Participant Processes ⇨ Enrollment and Intake ⇨ Enrollment

♫ NOTE: The participant must be fully certified in TWIST before assigning a peer counselor.

1. **Open the "Enrollment" screen and retrieve the participant to be assigned a peer counselor.**

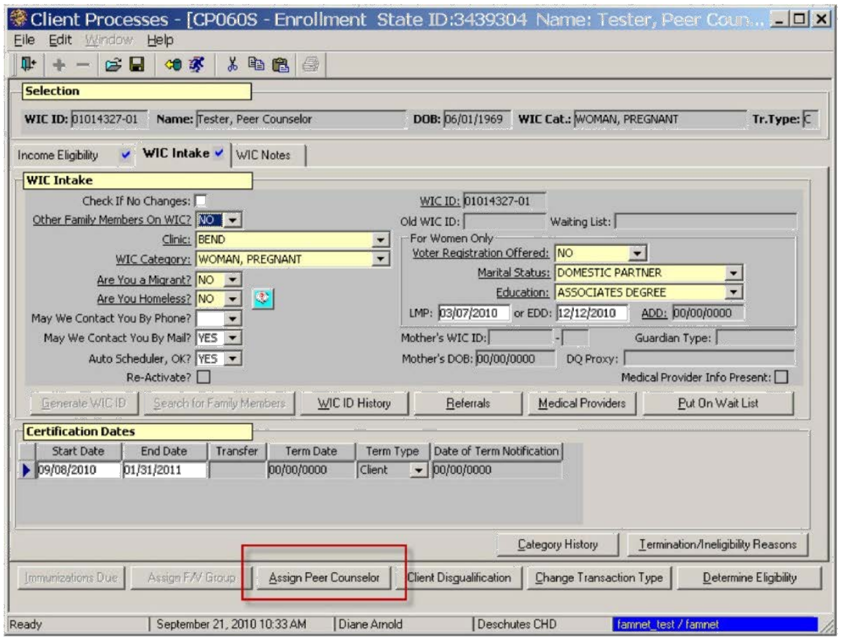

Figure 1: "Enrollment" Screen

2. **Click on the "Assign Peer Counselor" button at the bottom of the screen to open the "Assign Peer Counselor" pop-up.**

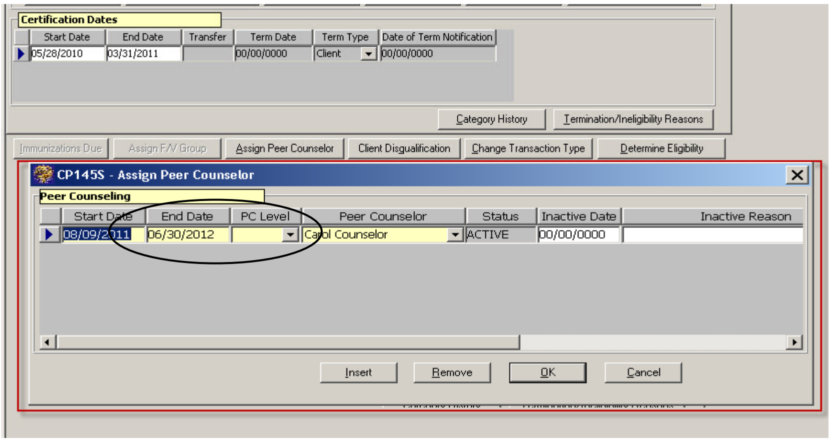

Figure 2: "Assign Peer Counselor" Pop-Up showing Start and End Dates auto-filled

♫ NOTE: The Start Date will automatically fill with today's date. The End Date will automatically fill a date six months from the EDD rounded to the end of the month. Once the ADD has been entered in the Intake Screen, the End Date will adjust to six months from ADD.

♫ NOTE: Peer counselor staff must first be added to the "Staff Information" table in the "Operations and Management" module, which requires the Breastfeeding Peer Counselor Coordinator to have the correct security role.

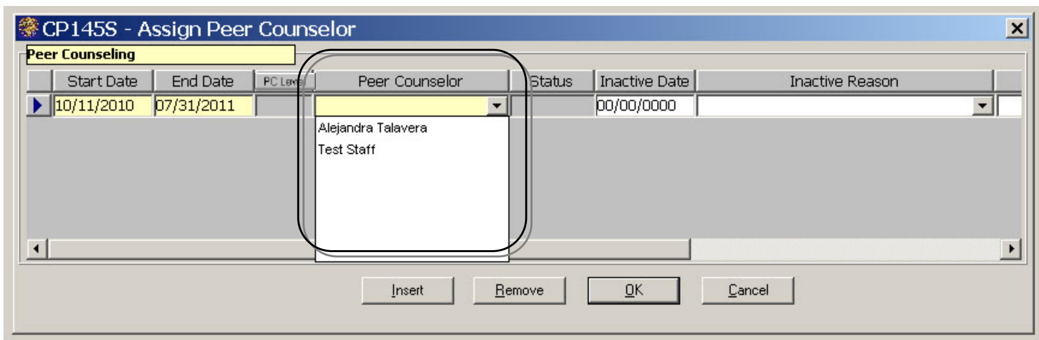

Figure 3: Peer Counselor" drop down displaying peer counselors

3. **Click on the name of the counselor.**

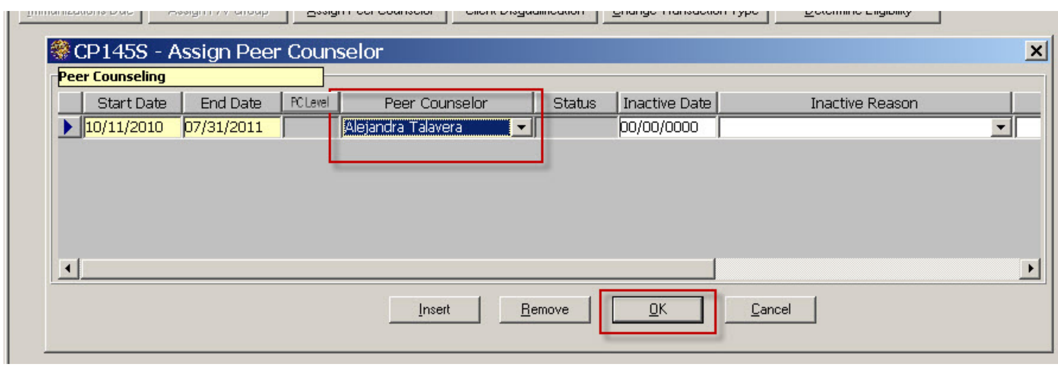

Figure 4: "Peer Counselor" field with counselor selected and OK button

4. **Click on the "OK" button to close the "Assign Peer Counselor" Screen.**

♫ NOTE: TWIST automatically adds "ACTIVE" to the Status field after OK is clicked and the Assign Peer Counselor screen is closed. When a woman is no longer participating in the peer counselor program, the status will be "INACTIVE".

♫ NOTE: To change a peer counselor, repeat the process for accessing the Assign Peer Counselor screen and select a different peer counselor.

5. **Select "PC Level."**

- Agencies with Breastfeeding Peer Counselor programs may assign one of two PC levels, “PC” or “PC1”. The levels are used to organize the Peer Counseling program participants into the two groupings.
- TWIST will auto fill "PC" when you assign a woman to a peer counselor. “PC” identifies the routine service - enrolling pregnant women into the prenatal series.
- “PC1” identifies the non-routine service - enrolling pregnant women and following them individually during office visits, one to one, instead of in a group.

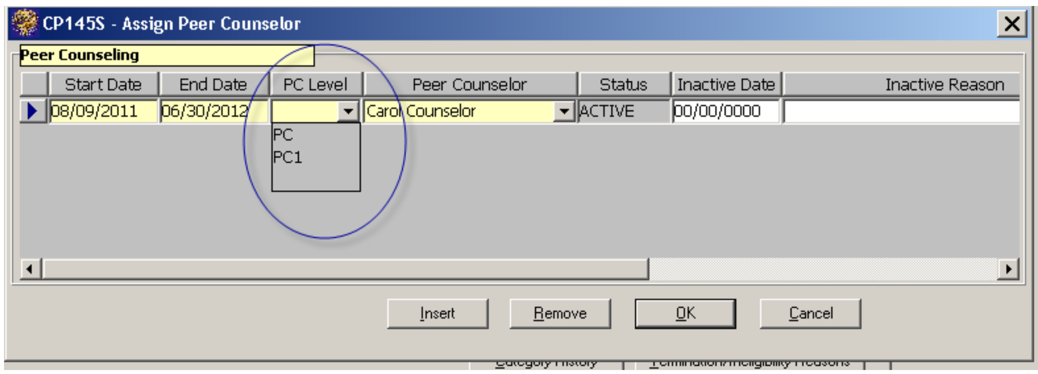

Figure 5: PC Level drop down.

- Once the PC level is assigned on a participant's "Assign Peer Counselor" pop-up, it will display on the blue title banner for the client at the top of the screen. The blue banner will display "PC Level: PC," "PC Level: PC1" or “PC Status: Inactive."

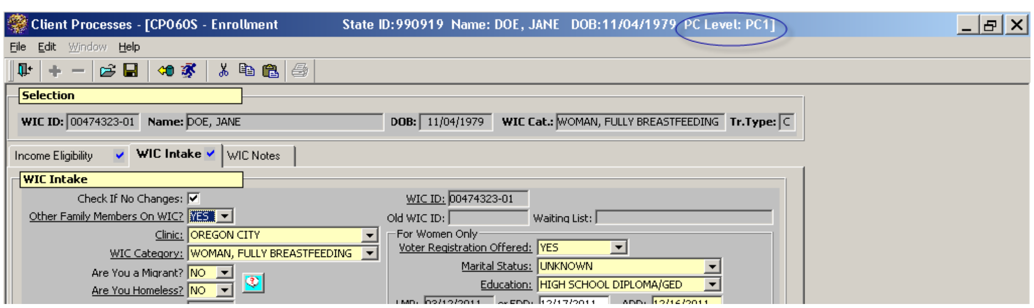

Figure 6: PC Level Status display in blue banner.

Assigning a Peer Counselor When the Participant has had a Peer Counselor With a Previous Baby

1. **To add the peer counselor assignment for a new pregnancy, click the "Insert" button in the "Assign Peer Counselor" pop-up to add a new row.**

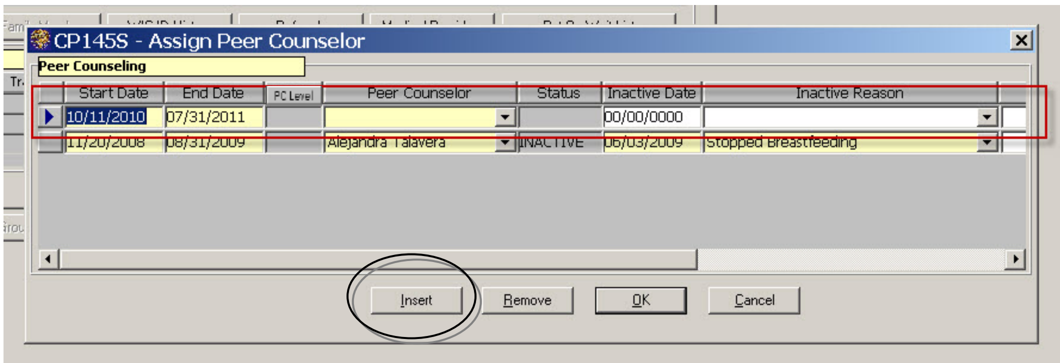

Figure 7: New row inserted when participant was assigned a Breastfeeding Peer Counselor with a previous baby.

2. **In the new row, follow the steps for assigning a peer counselor described in the previous section.**

Inactivating a Peer Counseling Participant

The "Assign Peer Counselor" screen is designed to update the reports that the Breastfeeding Peer Counseling Coordinator uses to manage the program, including when and why a participant stops participating.

The starting point for this section is:

Participant Processes ⇨ Enrollment and Intake ⇨ Enrollment ⇨ Assign Peer Counselor

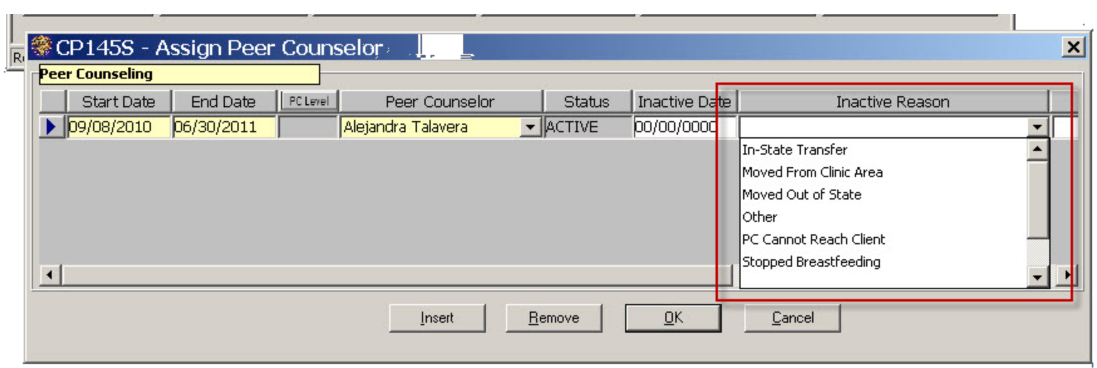

Figure 8: "Inactive Reason" drop-down list

1. **Select an Inactive Reason**

♫ NOTE: The "Status" and "Inactive Date" will auto-fill once a reason has been selected. This date can be changed manually.

Select "Other" for inactive reasons not in the drop down list, including:

- Miscarriages
- Victims of domestic violence that have moved for safety reasons
- Deceased mother or baby
- Incarceration of mother

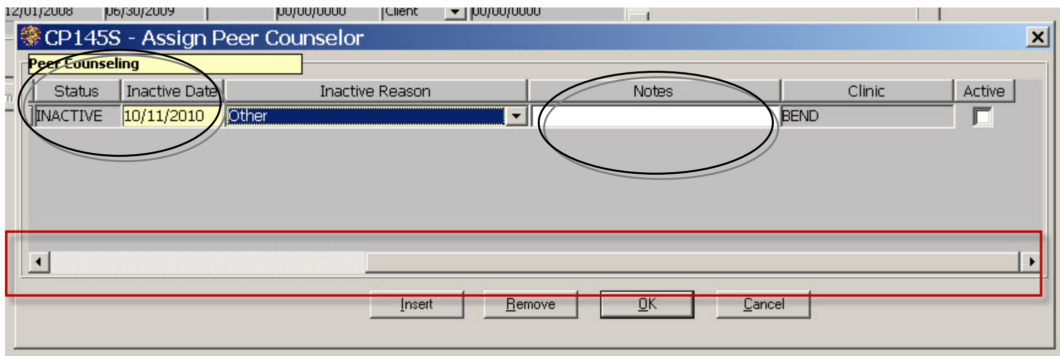

Figure 9: "Notes" field

2. **Scroll right to the "Notes" field if needed.**

3. **Click the OK button to close and update the record.**

Peer Counseling Reports

The starting point for this section is:
Client Processes⇨ Reports ⇨ Nutrition Education ⇨ Peer Counseling

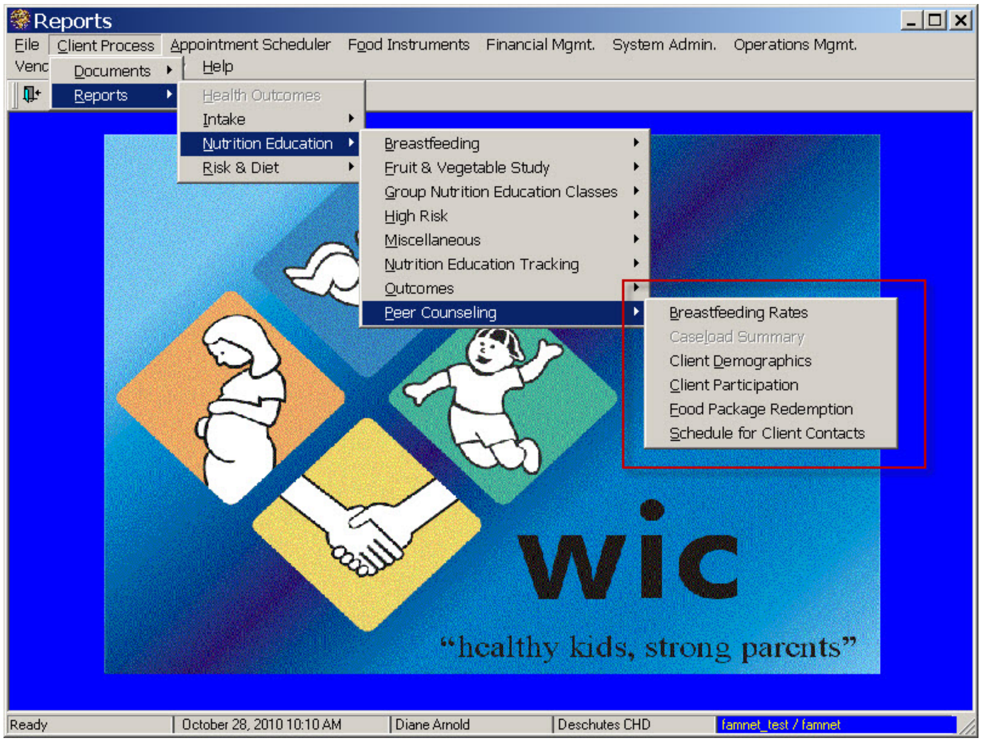

Figure 10: File Menu with Breastfeeding Peer Counseling Reports.

The reports available in the Peer Counseling File Menu are specific to Breastfeeding Peer Counseling participation and include:

- Breastfeeding Rates
- Caseload Summary
- Client Demographics
- Client Participation
- Food Package Redemption
- Schedule for Client Contacts

The Start and End Dates and Inactive Dates in the Assign Peer Counselor pop-up affect the data in all of these reports.

See Chapter 7 for information about printing reports. All TWIST reports provide a blank screen to enter selection criteria for the report you want to run.

It will also display on these reports: Peer Counseling Client Participation and Breastfeeding Tracking Function Call Back.

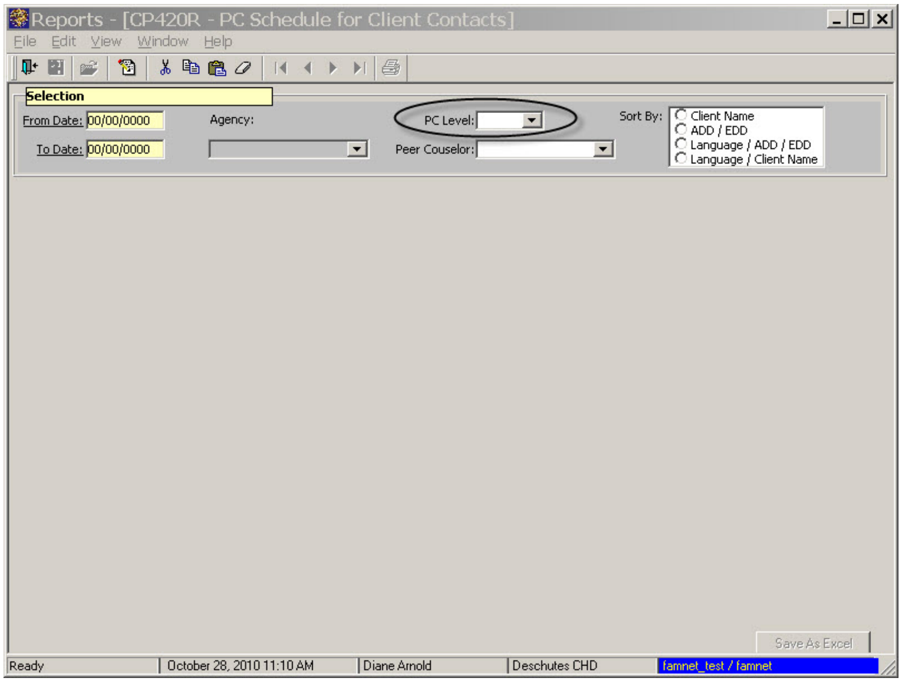

Figure 11: File Report Selection Criteria Screen for "PC Schedule for Participant Contacts" Report.

♫ NOTE: The Breastfeeding Peer Counseling Coordinator will print "**PC Schedule for Participant Contacts**" reports and give them to the peer counselors after participants are assigned in TWIST.

➥ *Practice Activities:*

Run a "PC Schedule for Client Contacts" for a specific peer counselor for this month.

1. Double click the "Reports" icon on "Select Modules" screen.
2. Select "Client Processes".
3. Select "Reports".
4. Select "Schedule for Client Contacts".
5. Select a peer counselor.
6. Enter a "From" date of the first of this month and a "To" date of the last day of this month.
7. Click the "Run" icon.
8. Do not print report.

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.

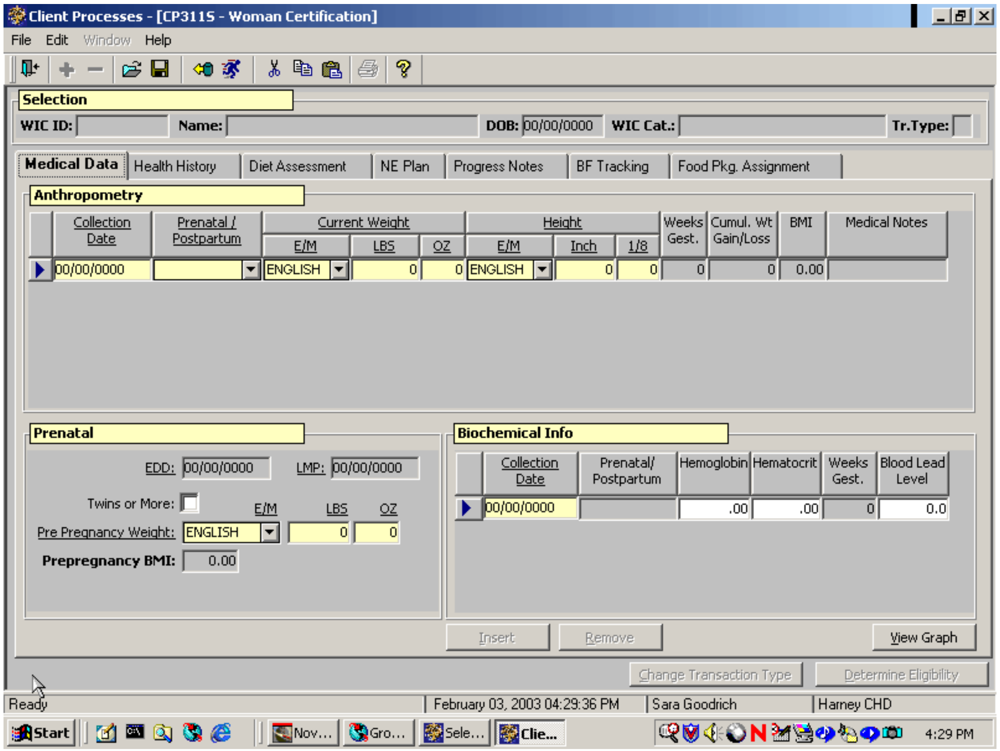

Figure 3: "Medical Data" Screen

- 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.**

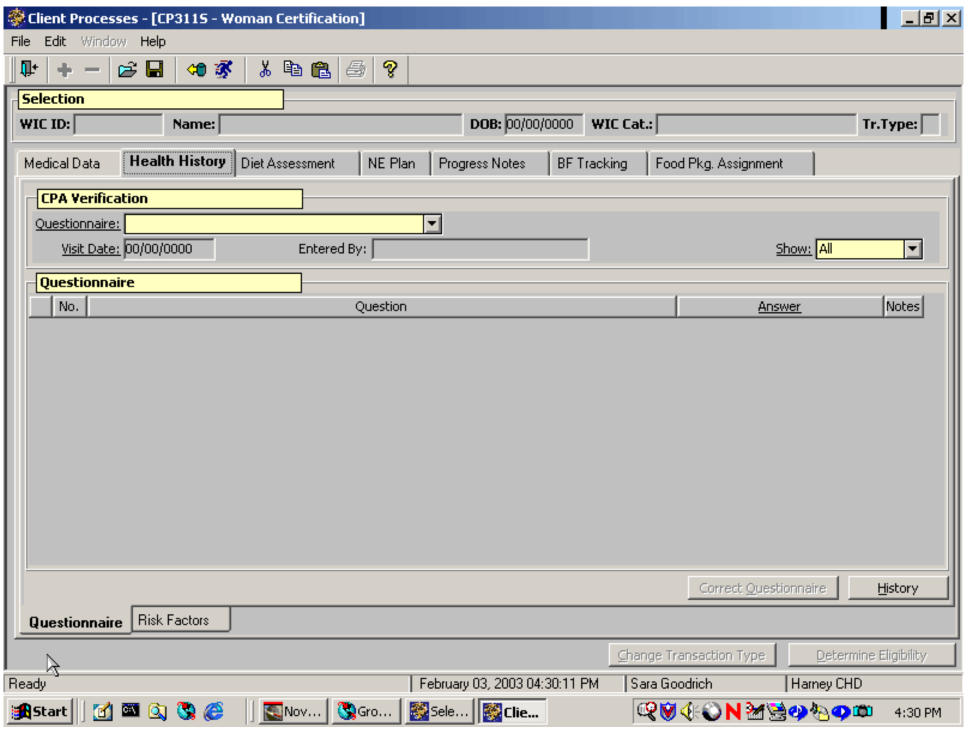

Figure 4: "Health History" Screen

- 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.**

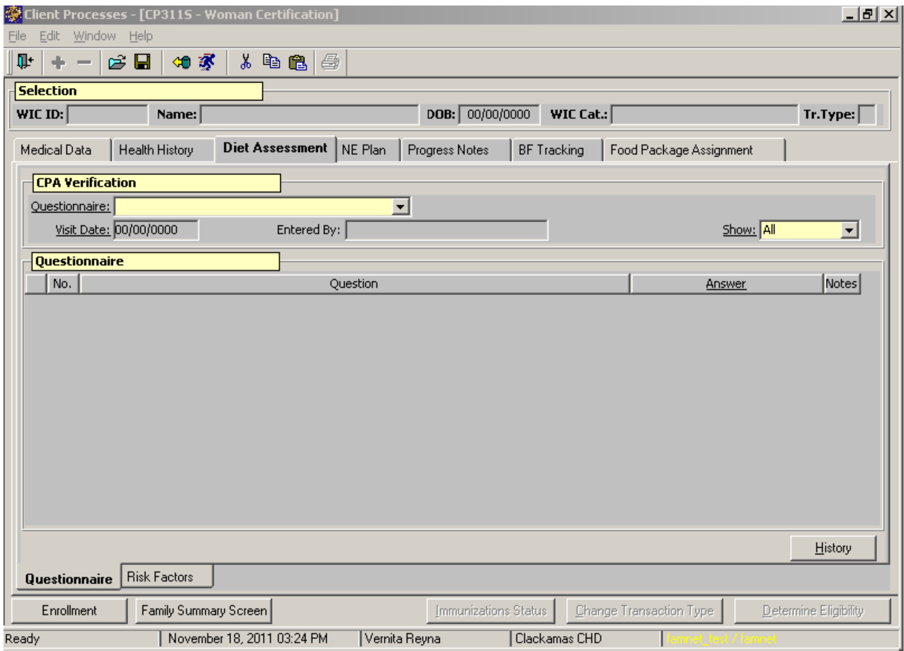

Figure 5: "Diet Assessment" Screen

- 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.**

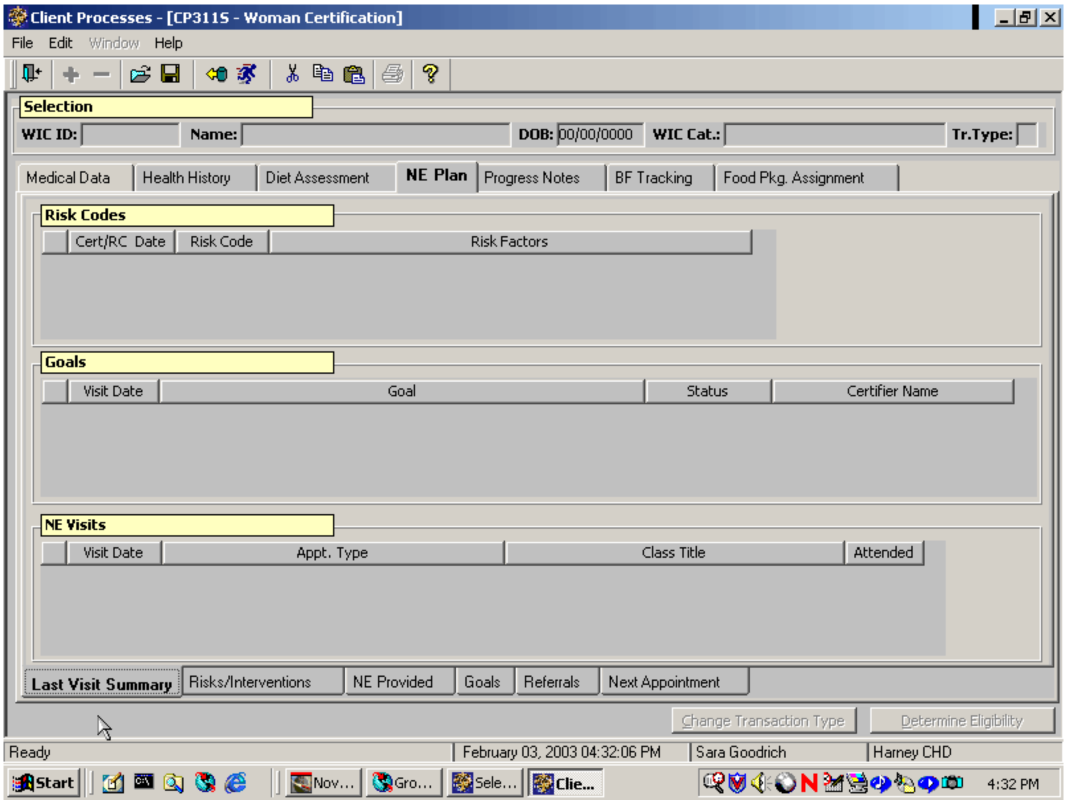

Figure 6: "NE Plan" Screen

- 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.**

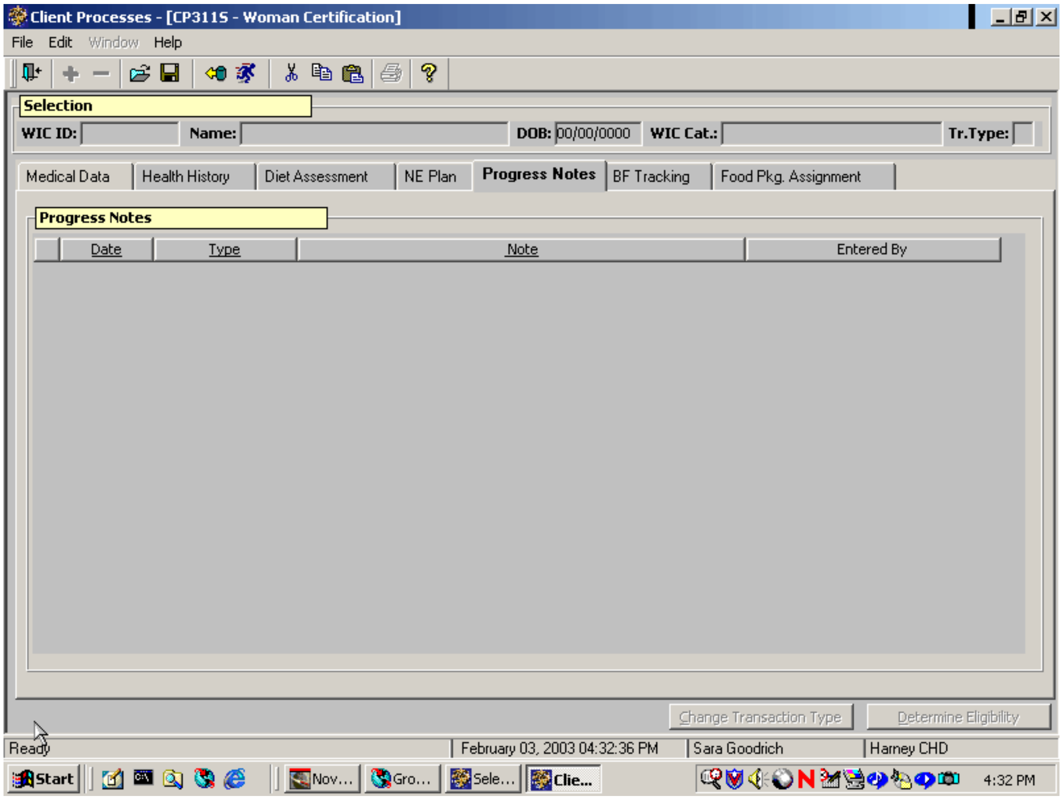

Figure 7: "Progress Notes" Screen

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

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

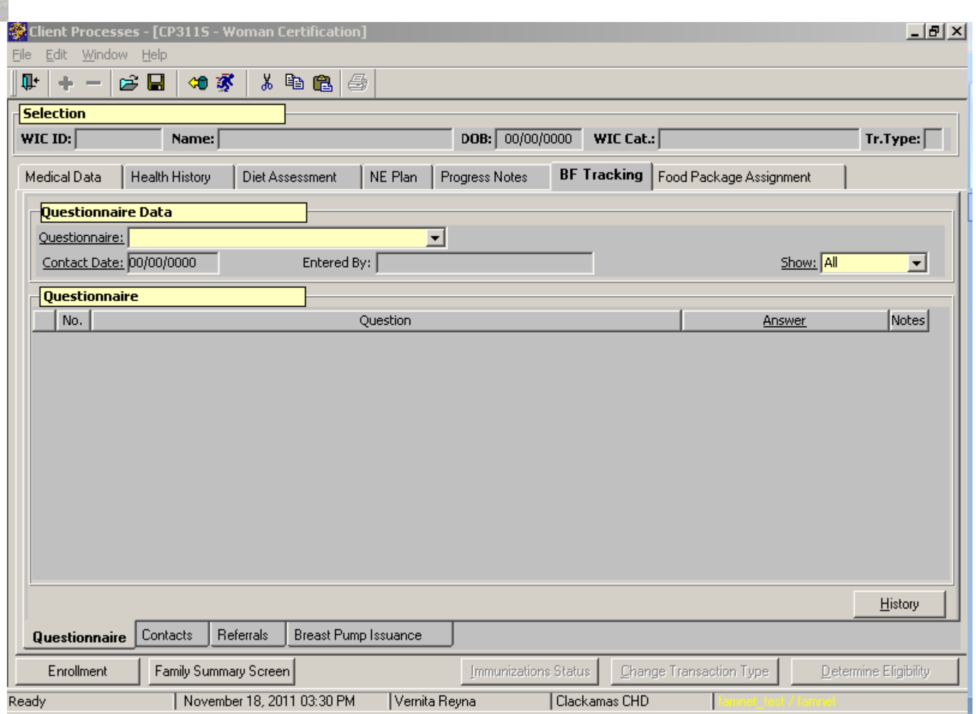

Figure 8: "BF Tracking" Screen

- 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.**

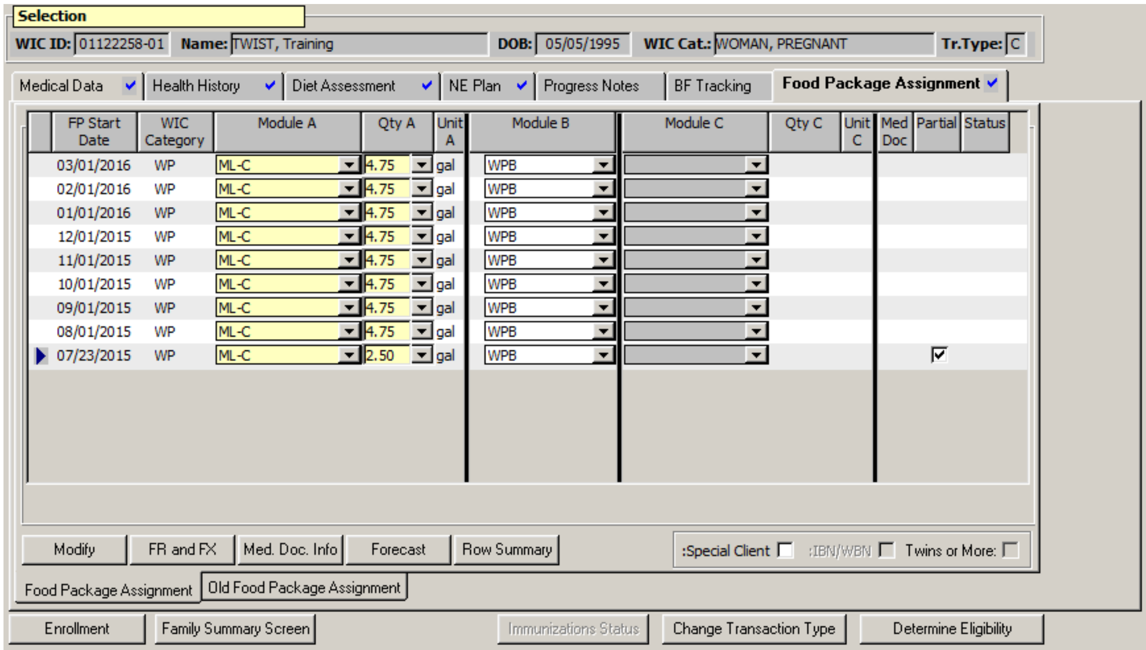

Figure 9: "Food Pkg. Assignment" Screen

- 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."**

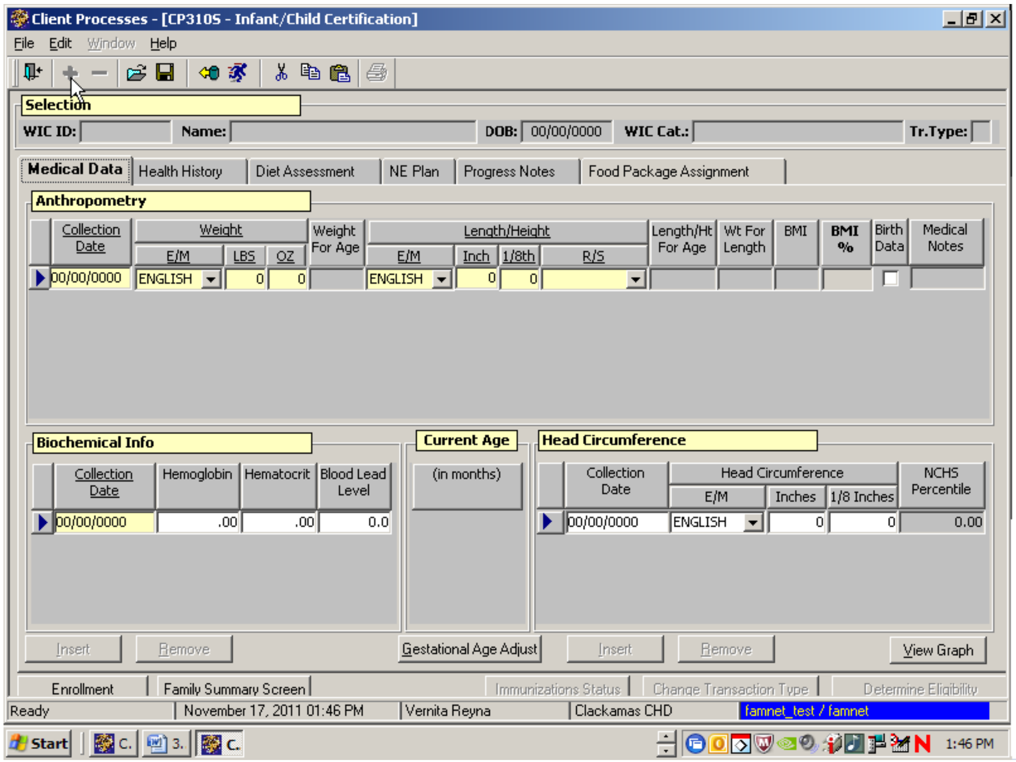

Figure 10: "Medical Data" Screen

- 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.**

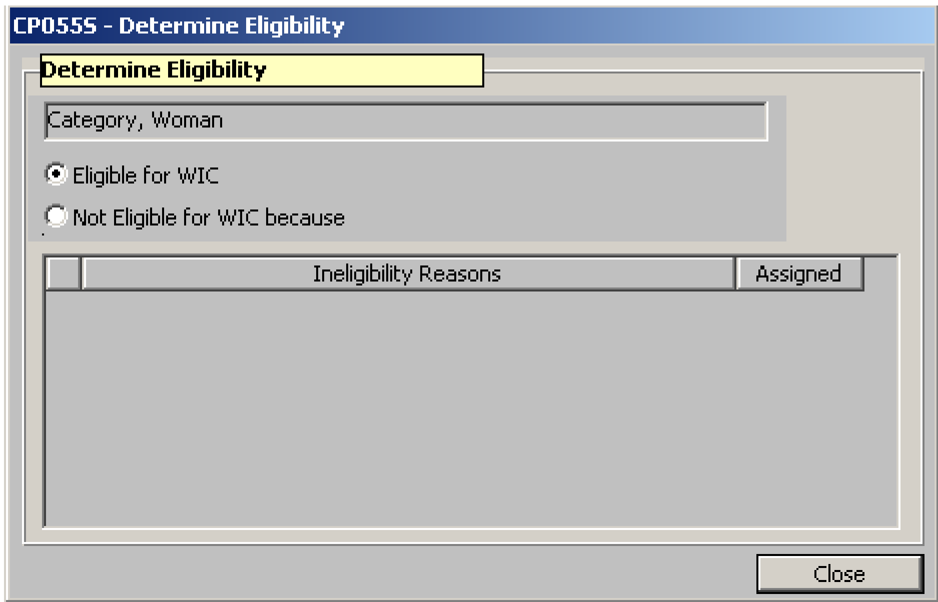

Figure 11: "Determine Eligibility" Pop-Up

- 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?

✏

✍ Notes:

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Chapter 3: Client Processes
Section 3: Assessment
Lesson: Risk Criteria and Risk Level

Objectives:

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

- assign, adjust, and assess risk and sub-risk factors;
- explain how priorities are computed;
- identify and delete inapplicable computer-assigned risk factors; and
- correctly demonstrate how and when to change the risk level field.

Oregon Policies:

- ♦ 657 Migrant Workers: Definition
- ♦ 670 Risk Criteria: Overview
- ♦ 675 Risk Criteria Codes and Descriptions

Overview:

All clients must have a health or nutrition-related risk to meet eligibility requirements. TWIST assists you in identifying risks and allows you to add or delete risks as needed. TWIST compares information you enter into the system to base table data and assigns risk(s) based on this information.

Once risks have been assigned, TWIST determines the priority and risk level of the client. Now you will have more time to talk to clients and help them develop goals and an action plan.

Remember, TWIST does have limitations – it is only a computer program. You should review all risk assignment information and add or remove risks as needed.

In this lesson you will learn to review system-assigned risks, assign non-system generated risks, and remove risks that are not applicable to a client.

Instruction:

Assigning and Deleting Risk(s)

The starting point for this section is:

Client Processes 🕑 Certification 🕑 Woman 🕑 Health History

1. **Retrieve the client for whom you want to enter risk information.**
2. **Click on the "Risk Factors" sub-tab in the lower left hand corner.**

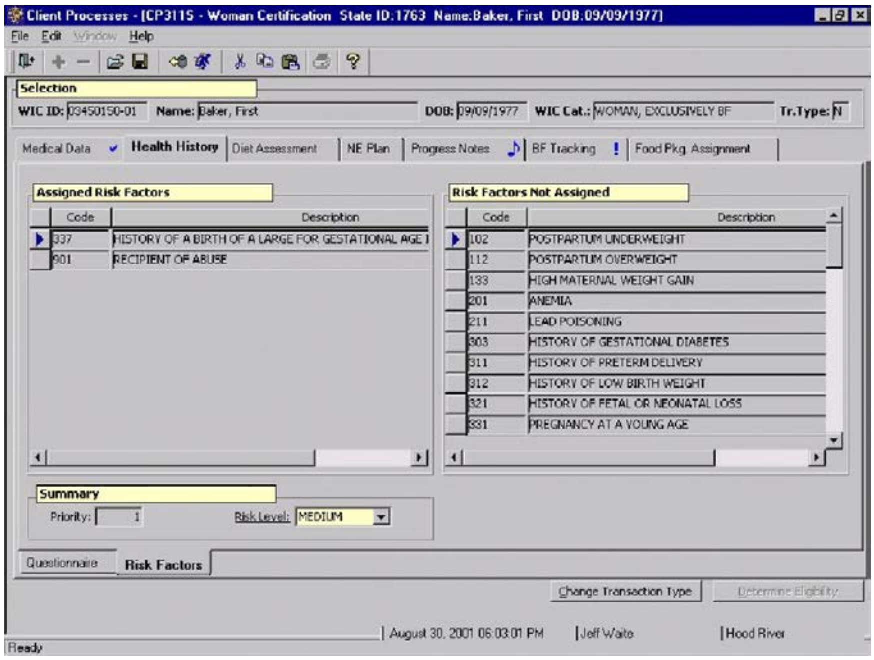

Figure 1: "Risk Factors" Screen

- The screen is divided into three sections "Assigned Risk Factors," "Risk Factors Not Assigned," and "Summary."
- Any system-assigned or manually assigned risk will be displayed on the left hand side of the screen in the "Assigned Risk Factors" section.
- System-assigned risks will be bold.
- All of the potential risks that the client may have, based on their category, are displayed on the right hand side of the screen in the "Risk Factors Not Assigned" section.

See Job Aids on "Risk List for Women" and "Risk List for Infants and Children" for more information.

3. **Click in the first row in the "Risk Factors Not Assigned" section.**

You can use the down arrow key or the scroll bar to the right to move up or down the list.

4. **Select the risk you want to assign by double-clicking on the risk.**

   - The risk is moved to the “Assigned Risk Factors” section.
   - To delete a risk, double click on a selection in the “Assigned Risk Factors” section. The risk is moved back to the other column.

NOTE: A risk factor can be moved between columns by double clicking on it.

5. **Save.**

   The “Priority” field in the “Summary” section is system-generated and is calculated based on category and risk.

6. **Tab to the “Risk Level” field.**

   - This field defaults to the level established in the base tables but can be changed.
   - The staff assigned to each risk level is determined by policy and the coordinator.

7. **Change risk level by clicking on a selection from the drop down list.**

8. **Save.**

9. **Exit.**

Tips and Shortcuts:

- You may assign any appropriate risk factor to a client.
- If you remove a system-assigned risk and then add it back, it will no longer be bold.
- You may delete any risk factor assigned by the system.
- This process is the same in both the “Health History” and “Diet Assessment” tabs.

Practice Activity:

Use the information from your Activity Sheet for this practice.

The starting point for this section is:

Client Processes ⌖ Certification ⌖ Woman ⌖ Health History

1. Access “Client Primary” and return to the “Health History” screen with your client.

2. Click on the “Risk Factors” tab in the lower left hand corner.
3. Click in the first row on the “Risk Factors Not Assigned” section.
4. Select risk 334 – **Lack of or Inadequate Prenatal Care**.
5. Double click to assign the risk.
6. Select risk 372 – **Alcohol or Illegal and/or Illicit Drug Use**.
7. Double click to assign the risk.
8. Click in the first row of the “Assigned Risk Factors” section.
9. Double click on **Alcohol or Illegal and/or Illicit Drug Use** to remove the risk.
10. Save.
11. Tab to the “Risk Level” field.
12. Change the risk to **medium**.
13. Exit back to “Client Processes.

Skill Check:

Certify a new prenatal client. Once the certification is complete, retrieve the client and open the “Risk Factor” screen. Make the following changes to your client’s risk information.

7. Add risk 343 – **Diabetes Mellitus**.
8. Delete risk 334 – **Lack of or Inadequate Prenatal Care**.
9. Add risk 359 – **Recent Trauma, Burns or Surgery**.
10. Change Risk Level to **High**.

Once you have entered the information, save your work and *do a screen print of the “Risk Factors” screen*. Write your name on the screen print before you turn it in to the instructor.

Notes:

Chapter 3: Client Processes
Section 3: Assessment
Lesson: Anthropometric / Biochemical for a Woman

Objectives:

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

- enter data in the Woman Medical Data screen;
- summarize how medical data is utilized by the TWIST system;
- open and view Woman graphs;
- identify when to use "9s" as the unknown value for anthropometric or biochemical values.

Oregon Policies:

♦ 625 Nutritional Risk Assessment

Overview:

Collecting, documenting and assessing anthropometric and biochemical data is an important part of every certification.

TWIST will compare anthropometric and biochemical data to established standards to determine if a participant is at risk. TWIST will plot anthropometric data on the appropriate grids and identify anthropometric or biochemical risks.

In this lesson you will learn how to document anthropometric and biochemical information and view the prenatal weight gain grids for women.

Instruction:

Entering Anthropometric Data

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Woman ⇨ Medical Data

1. **Retrieve the participant for whom you want to enter anthropometric/biochemical data.**

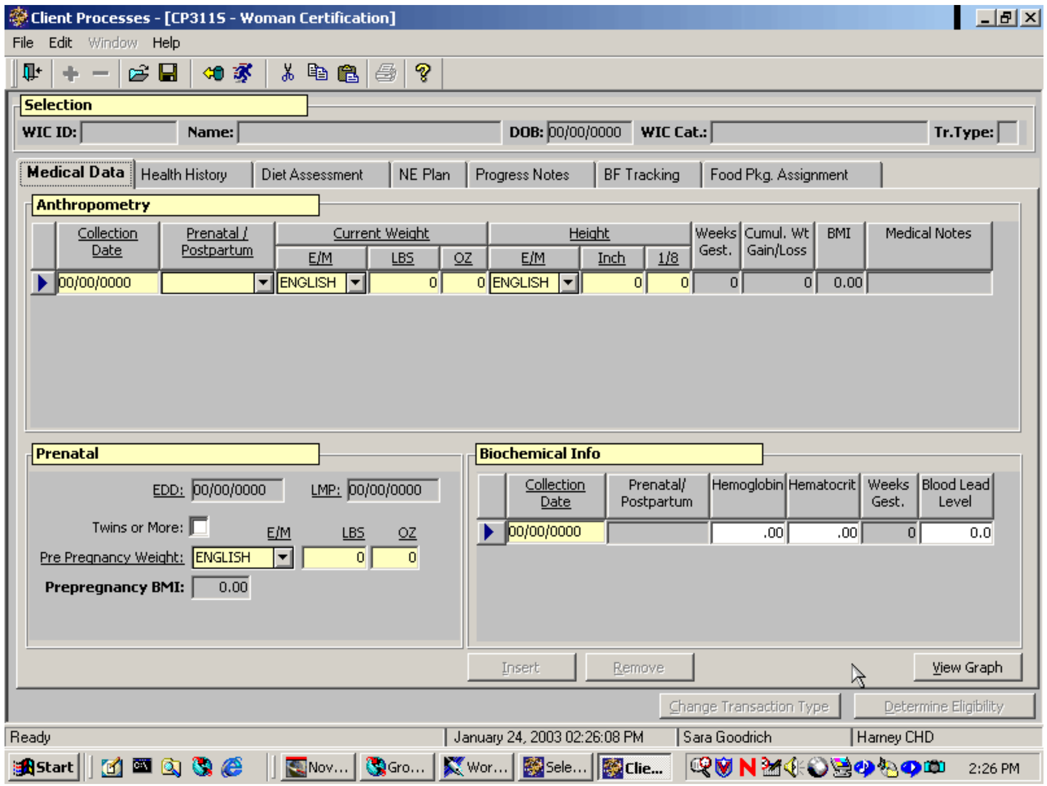

Figure 1: "Medical Data" Screen

2. **Enter the date the height and weight were collected in the "Collection Date" field.**

- This field defaults to the current date but may be changed.
- The correct format is MM/DD/YYYY.
- A certification will only be marked complete if a date not more than 60 days in the past has been entered.
- Historical data may be entered.
- Use the "**Insert**" icon to add additional rows.

3. **Tab to the "Prenatal/Postpartum" field and select the appropriate choice from the drop down list.**

4. **In the "E/M" field in the "Current Weight" section, select the unit of measure from the drop down list.**

- This field defaults to English.
- If English is selected, weight is entered in pounds and ounces.
- If Metric is selected, weight is entered in kilograms and grams.

- TWIST saves the data in English and defaults to English when the screen is accessed.
- For an unknown value, fill the "**lbs**" field with all 9s.

5. **Enter the participant's weight.**

6. **In the "E/M" field in the "Height" section, select the unit of measure.**

- This field defaults to English.
- If English is selected, height is entered in inches and eighths of an inch.
- If Metric is selected, height is entered in centimeters and millimeters.
- TWIST saves the data in English and defaults to English when the screen is accessed.
- For an unknown value, fill the "**inches**" field with all 9s.

7. **Enter the participant's height.**

♫ NOTE: "**Weeks Gest.**," "**Cumul. Wt Gain/Loss**," and "**BMI**" are system generated fields after all the mandatory data fields are completed.

- "**Weeks Gest.**" is calculated from collection date and the EDD.
- "**Cumul. Wt Gain/Loss**" is the calculated from most current weight and prepregnancy weight.
- "**BMI**" is calculated from current weight and height and displays for non-pregnant women.

8. **In the "Medical Notes" field, double click to open the "Woman Anthropometry Notes" pop-up.**

- Notes may be entered in a free-form text format.
- Click "**OK**" to save note and close pop-up.
- Click "**Cancel**" to close pop-up without saving note.

♫ NOTE: Information cannot be saved until all mandatory fields on this screen are filled. After the information on the screen has been saved, data entered may be modified until the End of Day process has occurred. After End of Day, data entered becomes display only and cannot be removed or changed. If the information was entered incorrectly, insert a new row using the "**Insert**" icon to enter the correct information.

Entering Prenatal Data

These fields will be displayed for prenatal participants only.

1. **Verify the dates in the "EDD" and "LMP" fields are correct.**

    - These fields are display only.
    - To modify these dates, you must enter the revised information on the "**Intake**" screen.

2. **Click the "Twins or More" box for a woman with a multiple fetus pregnancy.**

3. **Tab to the "Pre Pregnancy Weight" row.**

    - English is the default choice.
    - If English is selected enter prepregnancy weight in pounds and ounces.
    - If metric is selected entered prepregnancy weight in kilograms and grams.
    - The system will calculate the "**Prepregnancy BMI**."

Entering Postpartum Data

These fields will be displayed for postpartum participants only.

1. **Enter the participant's "ADD" (Actual Delivery Date) on the "Intake" screen.**

2. **Enter the participant's "EDD" (Estimated Delivery Date) on the "Intake" screen.**

    TWIST will calculate weeks gestation based on ADD and EDD.

3. **Enter the "Total Weight Gain for the Pregnancy Just Completed" on the Medical Data screen.**

    - English is the default choice.
    - If English is selected enter weight in pounds and ounces.
    - If metric is selected entered weight in kilograms and grams.

4. **If needed, enter "Weight Before Last Pregnancy."**

    - If client was enrolled during pregnancy, this field will be automatically filled in from her prenatal data.

- "**BMI Before Last Pregnancy**" will be calculated from this field and Height.

Entering Biochemical Data

1. **Enter the date the blood work was collected in the "Collection Date" field.**

   - This field defaults to the current date but may be changed.
   - The correct format is MM/DD/YYYY.
   - Historical data may be entered.
   - A certification will only be marked as complete if a date not more than 60 days in the past has been entered.

2. **Enter the hemoglobin or hematocrit value for the client.**

   - You may enter both a hemoglobin and hematocrit value, but you must enter one or the other.
   - For an unknown value, fill the field with all 9s.
   - If a hemoglobin value less than 5.0 or greater than 18.0 is entered or if a hematocrit value less than 20.0 or greater than 56.0 is entered, a warning message will pop-up. To close the pop-up click "**OK**."

♫ NOTE: The "**Weeks Gest.**" field is system generated and calculated from the "**Collection Date**" and "**EDD**."

3. **Tab to the "Blood Lead Level" field and enter the blood lead level value.**

   This field is optional but is used in risk identification.

4. **Save.**

   - Click the "**Insert**" button to add additional rows for biochemical data.
   - Click the "**Remove**" button to remove a row of data prior to it being saved.
   - Once data has been saved TWIST will compare the client's data to the established standards and auto-assign any appropriate risks.

Viewing the Graphs

1. **Click the "View Graph" button.**

The graph screen is displayed after data is saved.

2. **Select the appropriate graph from the "Select Graph" drop down list.**

   - For pregnant women, the system will select the appropriate prenatal weight gain graph to use based on the woman's prepregnancy BMI. The four graph options are Underweight, Standard Weight, Overweight and Obese.
   - When the "Twins or More" box is checked, multifetal weight gain graphs will be available for viewing. The appropriate prenatal weight gain graph will be selected based on the woman's prepgnancy BMI. The four multifetal graph options are Underweight, Standard Weight, Overweight and Obese.

3. **View graph.**

4. **Click the "Print Graph" button to print the graph.**

5. **Click the "Close" button to return to the "Medical Data" screen.**

✂ *Tips and Shortcuts:*

- To add a row to the "Anthropometry" section, click the "Insert" icon.
- When data has been entered in metric, click the "Refresh" icon to view it in English.
- If a value is entered that is not within "normal" parameters a warning message will be displayed stating the value is not with the established range. Click "OK" to close the message pop-up. You are not required to change the value.
- If an incorrect value is entered for height, weight, hematocrit or hemoglobin and saved, the system will assign risk based on the incorrect value and will not remove the risk even if the value is later corrected. Always check the "Risk Factors" tab for accurate risk factor assignment and add or remove risks as needed,
- When placeholder values are entered for weight and height, TWIST is unable to calculate cumulative weight gain or loss, BMI, or plot a client's data on a grid.
- Use the notes field to record refusal for collecting anthropometric or biochemical data.

➥ *Practice Activities:*

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

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Woman ⇨ Medical Data

1. Click the “Open” icon to access “Client Search” and select your participant.
2. Click the “Return with Client” button to return to the “Medical Data” screen.
3. Click in the “Collection Date” field and enter a date three months ago.
4. Tab to the “Prenatal/Postpartum” field and select “Prenatal.”
5. Tab to the “Current Weight” section and enter your weight in pounds and ounces.
6. Tab to the “Height” section and enter your height in inches and eighths of an inch.
7. Tab to the “Medical Notes” field and enter a note.
8. Click “OK” to save note.
9. Tab to “Pre Pregnancy Weight” row and enter your ideal weight in pounds and ounces.
10. Tab to the “Biochemical Info - Collection Date” field and enter a date three months ago.
11. Tab to the “Hemoglobin” field and enter 9.9.
12. Save your work.
13. Click the “View Graph” button to view your graphs.
14. Close the graph screen and exit back to the “Client Processes” window.

Great job! You have just completed the “Medical Data” screen. Let’s move on to the Skill Check to review the process one more time.

✓ *Skill Check:*

Continue with your participant’s new enrollment by entering her anthropometric and biochemical information. The following are the values that you collected today at her WIC appointment.

Height –63 inches
Current Weight – 162 pounds
Pre-pregnancy Weight – 149
EDD – 4 months from today
Hematocrit – 34

Print her gestational weight gain grid to turn into your instructors.

✍ *Notes:*

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Chapter 3: Client Processes
Section 3: Assessment
Lesson: Anthropometric/Biochemical for an Infant/Child

Objectives:

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

- enter and interpret data in the Infant/Child Medical Data screen;
- summarize how medical data is utilized by the TWIST system;
- explain and utilize Infant/Child graphs; and
- interpret and identify when to use “9s” as the unknown value for anthropometric or biochemical values.

Oregon Policies:

- ♦ 625 Nutritional Risk Assessment
- ♦ 626 Hemoglobin and Hematocrit Screening in WIC
- ♦ 628 Anthropometric Screening

Overview:

Collecting, documenting, and assessing anthropometric and hematological data is an important part of every certification.

TWIST will compare the participant’s height, weight and blood work data to established standards and assign risks based on this information. In addition, TWIST will, plot anthropometric data on the appropriate growth charts.
In this lesson you will learn how to document anthropometric and hematological information and view the graphs for infants and children.

Instruction:

Entering Anthropometric Data for an Infant/Child

The starting point for this lesson is:

Client Process ⇨ Certification ⇨ Infant/Child ⇨ Medical Data

1. **Retrieve the client for whom you wish to enter anthropometric and/or biochemical information.**

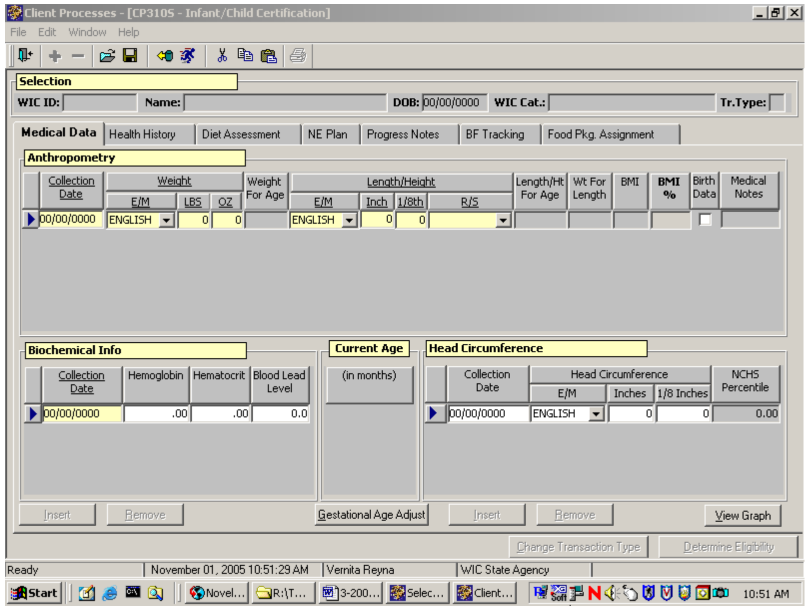

Figure 1: "Medical Data" Screen

2. **Enter the date the height and weight were collected in the "Collection Date" field.**

   - This field defaults to the current date, but may be changed.
   - The correct format is MM/DD/YYYY.
   - Historical data may be entered back to the client's birthdate.
   - Use the "Insert" icon to add additional rows.
   - A certification will only be marked complete if a date not more than 30 days in the past has been entered.

3. **In the "E/M" field in the "Weight" section, select the unit of measure from the drop down list.**

   - This field defaults to English.
   - If English is selected, weight is entered in pounds and ounces.
   - If Metric is selected, weight is entered in kilograms and grams.
   - TWIST saves the data in English and defaults to English when the screen is accessed.
   - For an unknown value, fill the "lbs" field with all 9s.

4. **Enter the client's weight**.

   The "Weight for Age" field is calculated by the system and displays the weight for age percentile after the data is saved.

5. **In the "E/M" field in the "Length/Height" section, select the unit of measure.**

- This field defaults to English.
- If English is selected, length/height is entered in inches and eighths of an inch.
- If Metric is selected, length/height is entered in centimeters and millimeters.
- TWIST saves the data in English and defaults to English when the screen is accessed.
- For an unknown value, fill the inches field with all 9s.

6. **Enter the client's length/height.**

7. **Select how the client was measured, recumbent (lying down) or standing, from the drop down list in the "R/S" field.**

    - This field defaults to recumbent for children less than 2 years of age.
    - This field defaults to standing for children over 2 years of age. The field may be manually changed to recumbent for children who are unable to stand for a height measurement.

    The "**Length/Ht for Age**," "**Weight for Ht**" and "**BMI**" fields are calculated by the system and display the length/height for age, weight for height percentiles, BMI and BMI percentiles after the data is saved.

8. **Click the "Birth Data" box if the weight and length/height information entered is the client's birth data.**

♫ NOTE: If no birth information is entered for clients up to 2 years of age, a message will pop-up stating "There is no birth information entered for this client. Would you like to enter it now?" Click "Yes" if you want to enter the birth information. Click "No" to close the pop-up.

9. **In the "Medical Notes" field, double click to open the "Infant/Child Anthropometry Notes" pop-up.**

    - Notes may be entered in a free-form text format.
    - Click "OK" to save the note and close the pop-up.
    - Click "Cancel" to close the pop-up without saving the note.

♫ NOTE: Information cannot be saved until all mandatory fields on this screen are filled. After the information on the screen has been saved, data entered becomes display only and cannot be removed or changed after the date of original entry.

Entering Hematological Data for an Infant/Child

1. **Enter the date the blood work was collected in the "Collection Date" field.**

   - This field defaults to the current date but may be changed.
   - The correct format is MM/DD/YYYY.
   - Historical data may be entered back to the client's birth date.
   - A certification will only be marked as complete if a date not more than 60 days in the past has been entered.

2. **Enter the hemoglobin or hematocrit value for the client.**

   - You may enter both a hemoglobin and a hematocrit value.
   - For an unknown value, fill the field with all 9s.
   - If a hemoglobin value less than 5.0 or greater than 18.0 is entered or if a hematocrit value less than 20.0 or greater than 56.0 is entered, a warning message will pop-up. To close the pop-up click "OK."

3. **Enter the blood lead level value if available.**

   This field is optional.

4. **Save.**

   - Click the "Insert" button to add additional rows for hematological data.
   - Click the "Remove" button to remove a row of data prior to the end of the day when the data is entered.

Entering Head Circumference Data for an Infant/Child

The fields in this section are similar to the "Anthropometric" and "Biochemical" sections of the Medical Data Screen.

1. **Enter the date the head circumference measurement was made.**

2. **Select the unit of measure from the "E/M" drop down list.**

3. **Enter the client's head circumference value.**
4. **Save.**

   - Click the "Insert" button to add additional rows for head circumference data.

- Click the "Remove" button to remove a row of data prior to the end of the day when the data is entered

Viewing the Graphs

1. **Click the "View Graph" button**.

   - Graphs are available for viewing after length or height and weight measurements are entered and saved on the Medical Data screen.
   - Plot points will appear as dots or Xs. X is used to indicate that a recumbent measurement has been plotted on a standing graph for children over age 2 years.
   - To enlarge the graph viewing area click the "Maximize" button.
   - To return the graph viewing area to the original size click the "Minimize" button.
   -

2. **Select the appropriate graph from the "Select Graph" drop down list.**

   - See the TWIST "Growth Chart" job aid for a list of graphs that are available in TWIST at each age.
   - Scroll down to see the graph.
   - Additional graphs can be viewed by returning to the select graph drop down.

3. **Click the "Print Graph" button to print a specific graph.**

4. **Click the "Print All Graphs" button to print all the graphs.**

5. **Click the "Close" button to return to the "Medical Data" screen.**

Viewing Adjusted Age Graphs

In order for premature infants anthropometric data to plot for adjusted age, information must be entered into the "Gestational Age Adjust" pop-up. The information is also used to determine system generated risks related to prematurity. This pop-up would only be completed for infants and children up to two years of age.

1. **Click the "Gestational Age Adjust" button.**

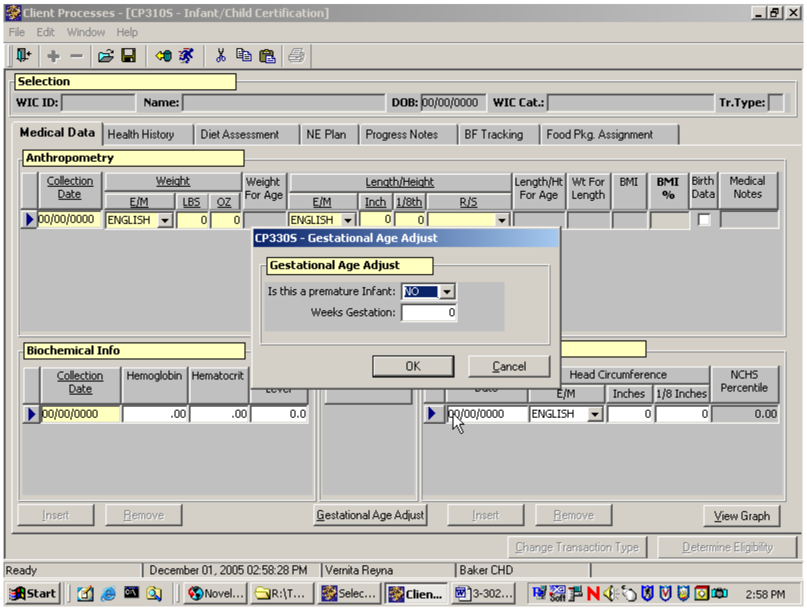

Figure 2: "Gestational Age Adjust" Pop-Up

2. **Select yes or no from the drop down list in the "Is this a premature infant" field.**

    - This field defaults to no.
    - When yes is selected, the "**Weeks Gestation**" field becomes mandatory.

3. **Enter the weeks gestation at birth.**

4. **Click "OK" to save the information and close the pop-up.**

    Click "Cancel" to close the pop-up without saving the information.

5. **Click the "View Graph" button**.

    - To enlarge the graph viewing area click the "Maximize" button.
    - To return the graph viewing area to the original size click the "Minimize" button.

6. **Select the appropriate graph from the "Select Graph" drop down list.**

    - Age adjusted graphs, Length for Age and Weight for Age, will only be available for premature infants whose weeks gestation were entered in the "Gestational Age Adjust" pop-up.

8. **Click the "Print Graph" button to print a specific graph.**

9. **Click the "Print All Graphs" button to print all the graphs.**

10. **Click the "Close" button to return to the "Medical Data" screen.**

✂ *Tips and Shortcuts:*

- You must save the data entered before you can access the "Gestational Age Adjust" pop-up.
- When placeholder values (9s) are entered for weight or length/height, TWIST is unable to calculate weight for age, length/height for age, weight for height, and BMI.
- When anthropometric and hematological values meet a risk criteria definition, TWIST will generate the appropriate risk.
- If a value is entered that is not within "normal" parameters a warning message will be displayed stating the value is not within the established range. This message is intended to prevent incorrect values being entered. You are not required to change the value. Click "OK" to close the message pop-up.
- Use the notes field to record refusal for collecting anthropometric or hematological data.
- Age adjusted graphs are available for premature infants up until 2 years of age.

➥ *Practice Activity:*

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

1. Select "Certification" from the menu bar.
2. Select 'Infant/Child" and then "Medical Data" from the drop down menus.
3. Retrieve the client for which you wish to enter medical data.
4. Enter the date in the "Collection Date" field for "Anthropometry."
5. Select English or Metric from the "E/M" drop down list for weight.
6. Enter the client's weight.
7. Select English or Metric from the "E/M" drop down list for length/height.
8. Enter the client's length/height.
9. Click the "Birth Data" box if the data is birth data.
10. Enter the date in the "Collection Date" field for "Biochemical Info."
11. Enter the hemoglobin or hematocrit value.
12. Enter the blood lead level if available.
13. Enter the date in the "Collection Date" field for "Head Circumference" if available.
14. Select English or Metric from the "E/M" drop down list for "Head Circumference."
15. Save.
16. Click the "Gestational Age Adjust" button if the infant is preterm.

17. Enter the information into the “Gestational Age Adjust” pop-up.
18. Save.
19. View and print graphs.
20. Exit back to the “Client Processes” window.

✓Skill Check:

Use the information from your ☛ Activity Sheet.

Continue with the client’s new enrollment by entering the anthropometric and biochemical information.

Print the appropriate graphs when they are complete and turn them in to your instructor.

✍ Notes:

Chapter 3: Client Processes
Section 3: Assessment
Lesson: Health History

Objectives:

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

- correctly select and complete appropriate questionnaires;
- interview clients using the health history questions; and
- demonstrate how the CPA reviewed field is correctly used.

Oregon Policies:

- ♦ 450 Confidentiality
- ♦ 625 Nutritional Risk Assessment
- ♦ 640 Documentation Requirements

Overview:

In TWIST, the “Health History – Questionnaire” screen is one of the first steps used to determine nutrition and health status of a WIC participant. Information collected on this screen can be updated when needed and all historical information is available for you to review at the click of a button.

In this lesson you will learn how to select, complete, update and view health history information.

Instruction:

Completing the Questionnaire

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Woman ⇨ Health History

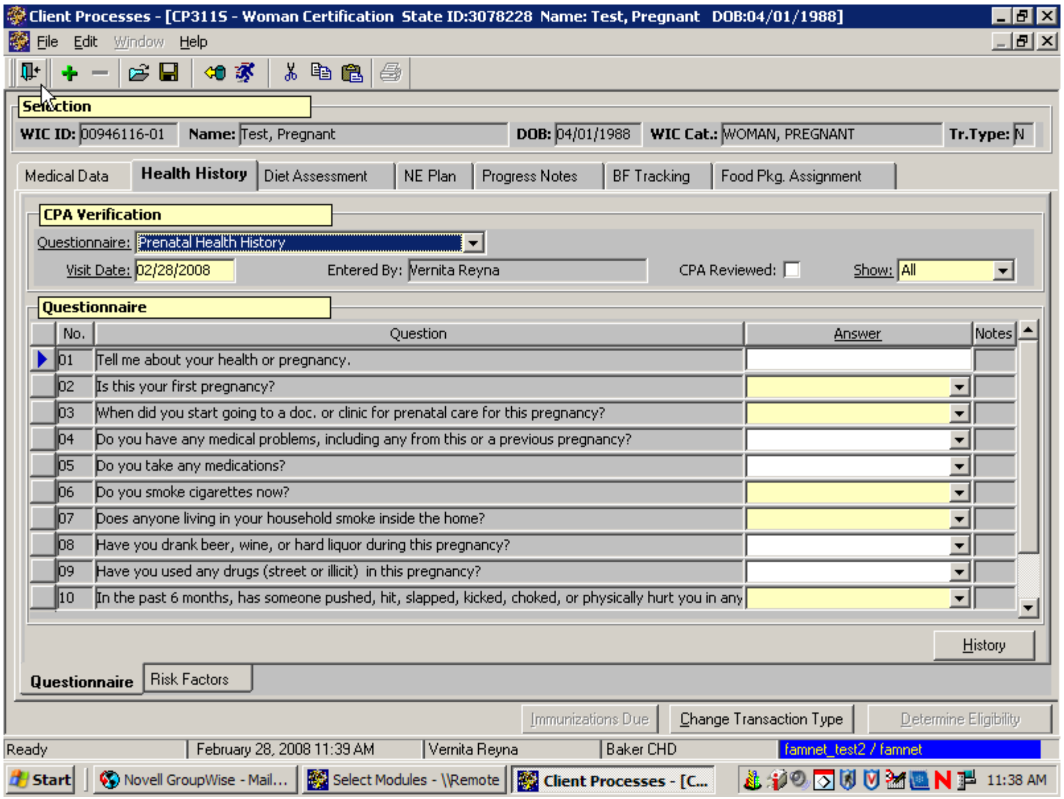

Figure 1: "Health History – Questionnaire" Screen

1. **Retrieve the client for whom you want to enter health history information.**

2. **From the "Questionnaire" field, select the appropriate questionnaire from the drop down list.**

3. **Tab to the "Visit Date" field.**

   - This field defaults to today's date but may be modified.
   - The "**Entered By**" field defaults to the current user based on their User ID.

4. **Tab to the "show" field.**

   - From this drop down menu you may select to display "**All**" questions or only "**mandatory**" questions.
   - The questions will be displayed in the "**Questionnaire**" section of the screen.

5. **Enter the appropriate answer for each question.**

- Click in the question field and scroll over to view the entire question.
- Clicking "**Ok**" will save the answers and close the pop-up.
- Clicking "**Cancel**" will close the pop-up.
- Risks may be generated based on answers entered.
- Certain answers may generate additional questions or pop-ups.

There are three types of answer possibilities:

- multiple choice; the answer is selected from the drop down list of answers.
- masked; the answer is entered in a specific format, such as a date.
- free-form text; the answer is typed in the answer box..

6. **Double click in the "Health History Notes" field.**

- This opens the "**Question Notes**" pop-up and allows you to enter a free form note, as needed.
- A note may be entered for each answer.

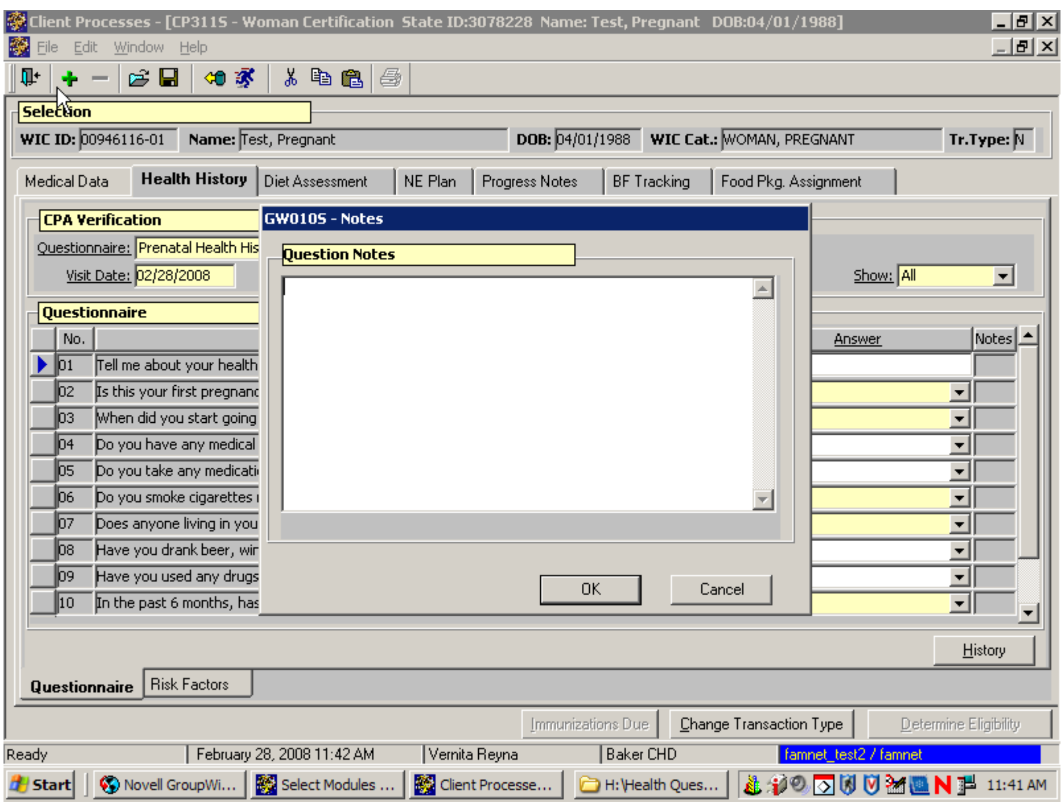

Figure 2: "Health History – Question Notes" Pop-Up

7. **Click "OK" to save the note and close the pop-up.**

   Clicking "**Cancel**" will close the pop-up without saving the note.

8. **View the "CPA Reviewed" checkbox.**

   - A Competent Professional Authority (CPA) must complete this checkbox.
   - If a non-CPA is entering answers to health history questions, a CPA must review the answers before checking the box.
   - The "**Health History**" screen will not be marked off as completed (blue check mark on tab) until this box has been checked and all mandatory questions are answered.
   - The tab can be saved without a CPA checkmark, but the tab will not receive the completed checkmark.

9. **Save.**

   The "**Health History**" tab will now have a checkmark.

➥ *Practice Activity #1:*

Use the information the client from your ☛ Activity Sheet.

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

1. Click the "Open" icon to access "Client Search" and select the client from your ☛ Activity Sheet.
2. Click the "Return with Client" button.
3. Select the prenatal health history questionnaire.
4. Leave "Visit Date" as today's date.
5. Check the "CPA Reviewed" box.
6. Tab to the "Show" field and select All.
7. For the question "Do you have any medical problems?" select yes.
8. Assign Gestational Diabetes and close the pop-up.
9. Complete the rest of the questions.
10. Save your work.

Accessing Questionnaire History

Previous health history questionnaires can be viewed at any time by using the "**History**" button.

The starting point for this section is:

Client Processes ➪ Certification ➪ Woman ➪ Health History ➪ Questionnaire

1. **Retrieve the client for whom you want to view health history information.**

2. **On the "Questionnaire" screen, click the "History" button.**

The "Questionnaire History" pop-up is displayed.

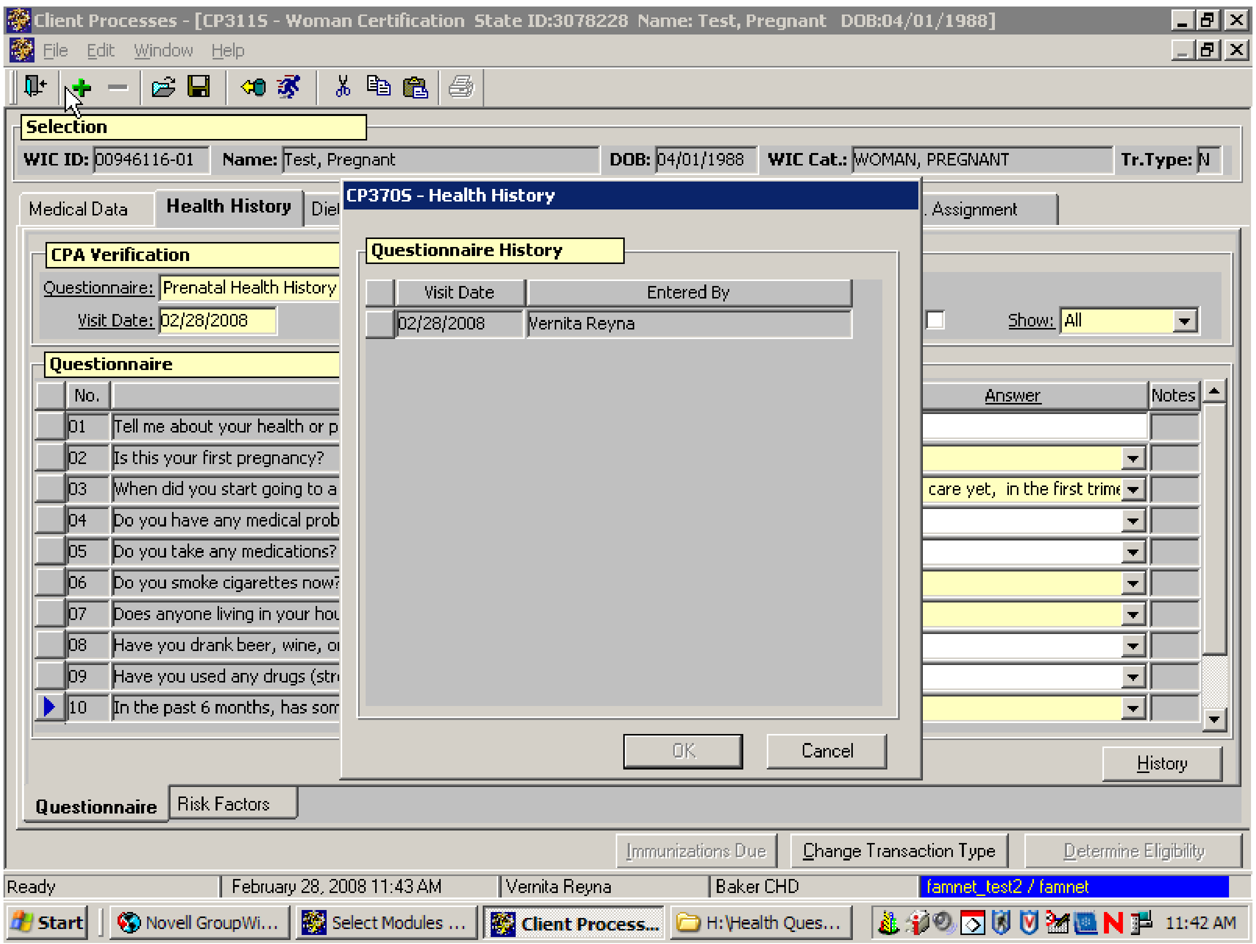

Figure 3: "Health History – Questionnaire – History" Pop-Up

3. **Select the questionnaire you want to view and click "OK."**

- The questionnaire is displayed.
- The questionnaire is view only and cannot be modified unless it was created today.
- To close the pop-up without selecting a questionnaire, click "**Cancel**."

- To view another questionnaire, click the "**History**" button and repeat the process.

4. **Exit the screen.**

➥ *Practice Activity #2:*

Use the information the client from your ☛ Activity Sheet.

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

1. Click the "Open" icon to access "Client Search" and select the client from your ☛ Activity Sheet.
2. Click the "Return with Client" button.
3. Click the "History" button.
4. Select the oldest "Visit Date" and click OK.
5. View the questionnaire.

✂ *Tips and Shortcuts:*

- After the questionnaire has been completed and saved you can view the risks by clicking on the "Risk Factors" tab.
- In order to get the medical conditions pop-up after the questionnaire has been completed, just change the answer back to "no," then change it again to "yes." This will bring the pop-up back again and allow you to change or make additional selections.
- You will be able to change answers to a questionnaire until the end of the day that the questionnaire was originally completed.
- To add a questionnaire (i.e.; for a follow-up visit), click on the "+" icon and select a questionnaire from the drop down menu.

✓ *Skill Check:*

1. Find a partner for this Skill Check. You will be taking turns interviewing each other and entering answers on the "Health History - Questionnaire" screen.
2. Since you have already completed a Health History Questionnaire for yourself you will need to create a new pregnant client.
3. Using this new client, complete the "Health History - Questionnaire" screen for this pregnant woman as you interview your partner. Do a screen print of the completed questionnaire. Then switch, and allow your partner to interview you.

4. The client has come in for a Nutrition Education appointment. You'd like to view the original Health History Questionnaire from this certification. Find the questionnaire on TWIST and do a screen print.
5. Write your name on the screen prints and turn them into your instructor.

✍ ***Notes:***

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Chapter 3: Client Processes
Section 3: Assessment
Lesson: Diet Assessment

Objectives:

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

- correctly utilize the "diet assessment" function;
- complete the Questionnaire sub-tab;

Oregon Policies:

♦ 625 Nutrition Risk Assessment

Overview:

Helping clients improve their eating habits is an important part of WIC services. TWIST assists this process by providing the Diet Assessment Questionnaire to help you assess and identify dietary risks and goals for the client.

This lesson teaches you how to complete the diet assessment questionnaire that will help you provide appropriate nutrition education to participants.

Instruction:

Completing the Questionnaire

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Woman ⇨ Diet Assessment

1. **Retrieve the client for whom you want to enter diet assessment information.**

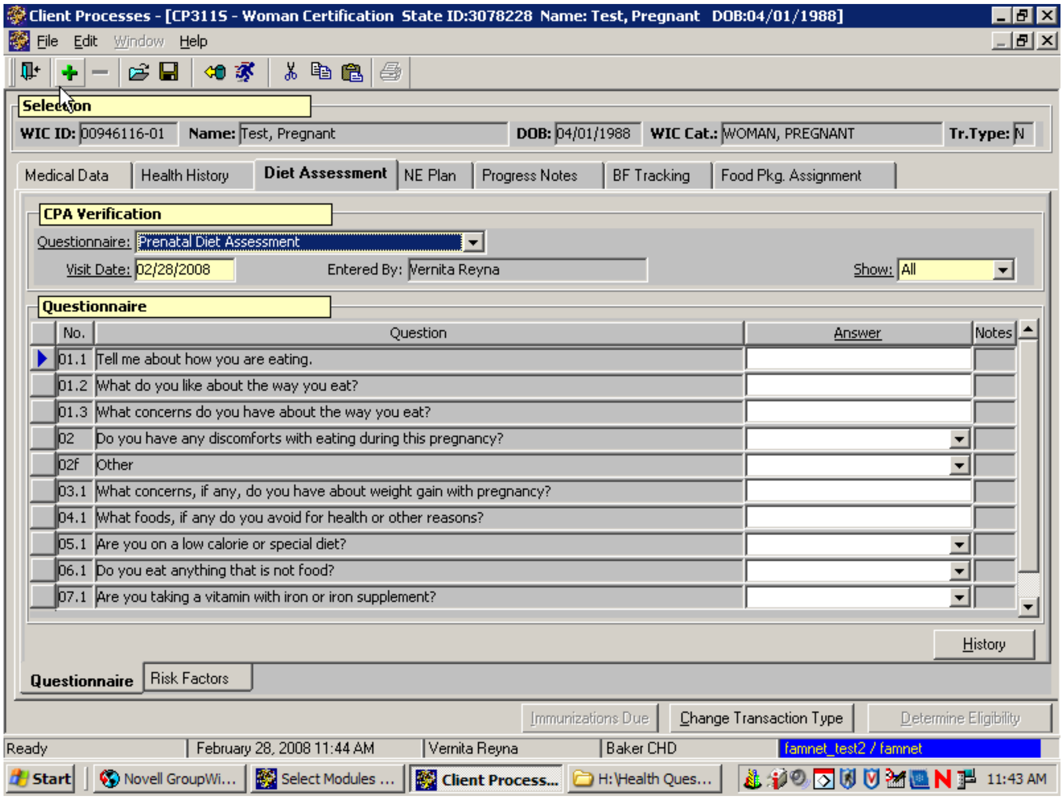

Figure 1: "Diet Assessment" Screen

2. **From the "Questionnaire" field, select the appropriate questionnaire from the drop-down list.**

3. **"Visit Date" field.**

    - This field defaults to today's date but may be modified.
    - The "**Entered By**" field defaults to the user's login ID.

4. **"Show" field.**

    - From this drop-down menu, you may select "**All**" questions or "**Mandatory**" questions from the drop-down list.
    - The questions will be displayed in the "**Questionnaire**" section of the screen.

5. **Enter the appropriate answer for each question that applies to the participant.**

    - Click in the question field and scroll over to view the entire question.
    - Risks may be generated based on answers entered.

- Certain answers may generate additional questions or pop-ups.

There are three types of answer possibilities:

- multiple choice; the answer is selected from the drop down list of answers.
- masked; the answer is entered in a specific format, such as a date.
- free-form text; the answer is typed in the answer box.

A blue checkmark on the Diet Assessment tab will be generated when the mandatory question is answered and the questionnaire is saved.

6. **Double-click in the "Diet Assessment Notes" field.**

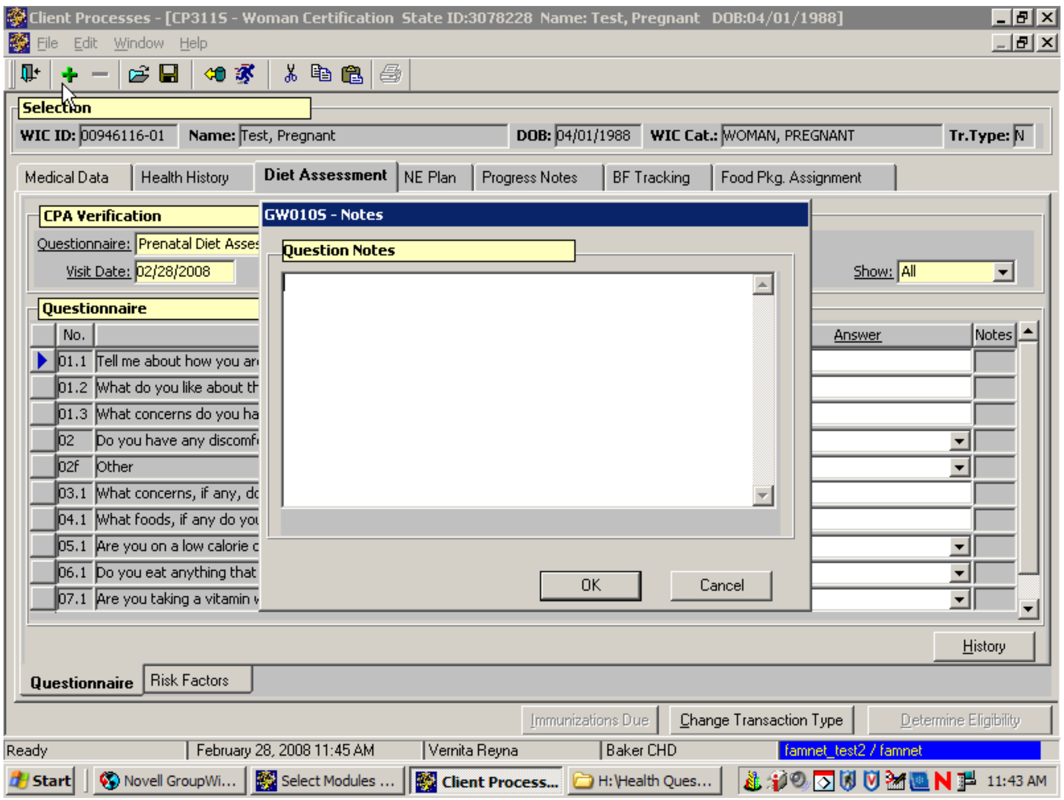

Figure 2: "Diet Assessment Notes" Pop-Up

- This opens the "**Notes**" pop-up and allows you to enter free form notes as needed.
- A note may be entered for each answer.

7. **Click "OK" to save the note and close the pop-up.**

To close the pop-up without saving, click "**Cancel**."

8. **Save.**

➥ *Practice Activity #1:*

Use the client from your ☛ Activity Sheet for this practice.

The starting point for this activity is:

Client Processes ⇨ Certification ⇨ Woman ⇨ Diet Assessment ⇨ Questionnaire

1. Click the "Open" icon to access "Client Search" and select the client for whom you want to enter diet assessment information.
2. Click the "Return with Client" button.
3. Select the pregnant woman questionnaire.
4. Leave "Visit Date" as today's date.
5. Tab to the "Show" Field and select All.
6. Enter the answers on the attached questionnaire.
7. Save your work.

Accessing Questionnaire History

Previous diet assessment questionnaires can be viewed at any time by using the "History" button.

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Woman ⇨ Diet Assessment ⇨ Questionnaire

1. **Retrieve the client for whom you want to view diet assessment information.**

2. **On the "Questionnaire" screen, click the "History" button.**

   The "**Questionnaire History**" pop-up is displayed.

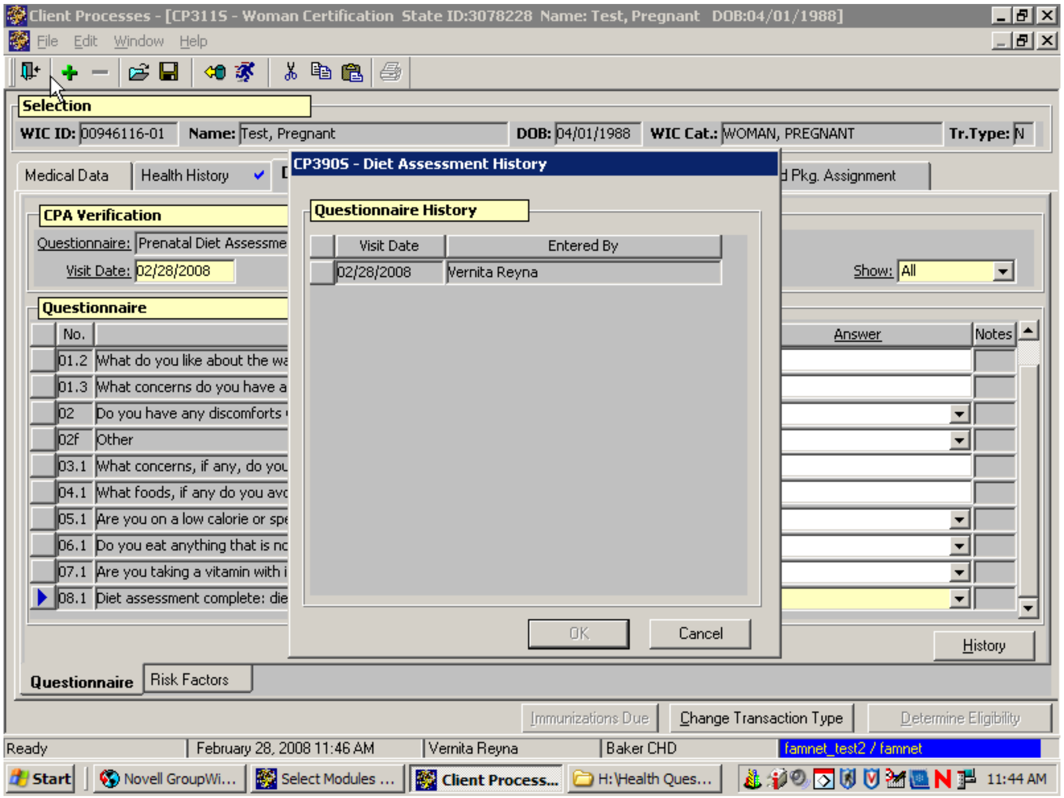

Figure 3: "Diet Assessment - History" Pop-Up

3. **Select the questionnaire you want to view and click "OK."**

- The questionnaire is displayed.
- The questionnaire is view only and cannot be modified on this screen unless it was created today.
- To close the pop-up without selecting a questionnaire, click "**Cancel**."
- To view another questionnaire, click the "**History**" button and repeat the process.

4. **Exit.**

➥ *Practice Activity #2:*

Use the client from your ☛ Activity Sheet for this practice.

The starting point for this activity is:

Client Processes ⇨ Certification ⇨ Woman ⇨ Diet Assessment ⇨ Questionnaire

1. Click the “Open” icon to access “Client Search” and select the client for whom you want to view diet assessment history.
2. Click the “Return with Client” button
3. Click the “History” button.
4. Select the oldest “Visit Date” and click “OK.”
5. Return to the “Questionnaire” screen.

✂ *Tips and Shortcuts:*

- After the questionnaire has been completed and saved, you may view the diet risks by clicking on the “Risk Factors” tab. The process for changing these risks is the same as in the Risk Criteria and Level lesson.
- Ask only the optional questions appropriate for the individual participant.
- Questions can be asked in any order.

✓ *Skill Check:*

Now that you have learned how to use the “Diet Assessment” screens, let’s take a few minutes to practice these functions again. Pair up with another person and take turns being the client.

1. Complete the “Diet Assessment Questionnaire” for your client.
2. *Print the screen after they are complete.*

✍ *Notes:*

Chapter 3: Client Processes
Section 4: First Nutrition Education Contact
Lesson: Interventions

Objectives:

Upon completion of this lesson the user will be able to:
- utilize “Last Visit Summary” and “Risks/Interventions” screens; and
- explain and utilize nutrition education interventions.

Oregon Policies:

- ♦ 800 Nutrition Education: Introduction and Overview
- ♦ 810 Nutrition Education: Making Education Available
- ♦ 820 Nutrition Education: Participant Contacts
- ♦ 830 Nutrition Education: Documentation

Overview:

TWIST provides you with a variety of screens to document client’s information. The “**Last Visit Summary**” and “**Risks/Interventions**” screens consolidate information and are a useful starting point for providing nutrition education.

Instruction:

Accessing the “Last Visit Summary” Screen

This screen can be used to view nutrition education information from the client’s last visit.

The starting point for this lesson is:
Client Processes ⇨ Certification ⇨ Woman ⇨ Nutrition Education Plan

♫ NOTE: At an initial certification visit all sections will be blank.

♫ NOTE: This screen will be covered in Chapter 3 Lesson 900 *Individual Follow-up* and Chapter 3 Lesson 700 *Recertification*.

Accessing the “Risks/Interventions” Screen

The starting point for this section is:
Client Processes ⇨ Certification ⇨ Woman ⇨ Nutrition Education Plan

1. **Click the "Risks/Interventions" tab to view the screen.**

   - The client's "**Risks/Interventions**" are displayed.
   - The combined "**Risk Factors**" from the "**Health History**" screen and "**Diet Assessment**" screen are displayed.
   - System assigned risks will be displayed in bold.
   - Intervention recommendations assigned to the risk can be viewed here.

2. **To add additional risks, click the "Insert" icon.**

   The "**Visit Date**" field defaults to the current date, but may be modified.

3. **Tab to the "Risk Code" field and use the drop down arrow to select the risk you wish to add.**

   If an intervention is associated with the risk it will be displayed.

4. **Double click on an "Intervention" to view the complete information about the recommended intervention.**

   The complete intervention will be displayed in the "**Intervention Text**" pop-up.

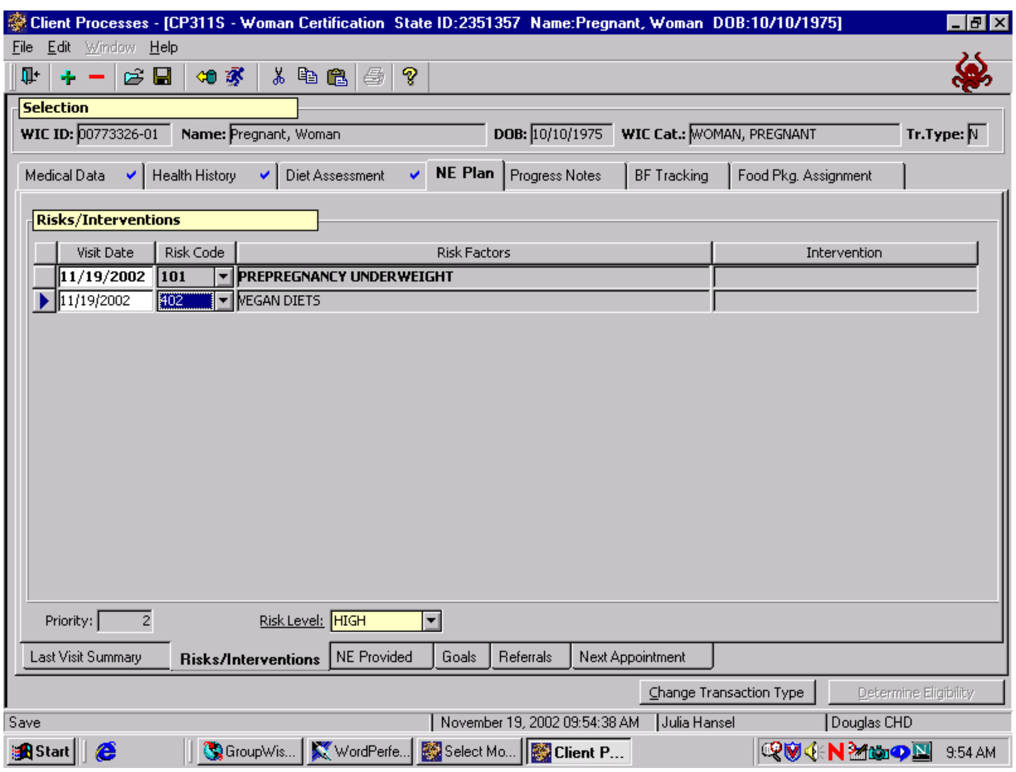

Figure 1: "Risks/Interventions" Screen

5. **Click "OK" or "Cancel" to close the pop-up.**

6. **Tab to the "Risk Level" field.**

   This field defaults to a system generated risk level based on the client's risks, but it may be modified using the drop down menu.

♫ NOTE: The "**Priority**" field defaults to the appropriate priority and may not be changed.

7. **Save.**

Adding a Local Intervention

The starting point for this section is:
Client Processes ⇨ Certification ⇨ Woman ⇨ Nutrition Education Plan

1. **Double click on the Intervention Text line for the risk code for which you are adding text.**
   - The upper box is display only and may contain the state intervention text.
   - The lower box is for the local intervention text. The cursor will appear in the lower box for you to begin typing.
2. **Type your intervention text in the lower box**.
3. **Click "OK."**

Save.

✂ *Tips and Shortcuts:*

- Risks may be added in this screen but can be deleted only in the "Health History - Risk Factors" and "Diet Assessment - Risk Factors" screens.
- To remove a blank row before a risk is assigned use the "Remove" icon.

➥ *Practice Activities:*

Use the client from the ☛ Activity Sheet for this practice.

The starting point for this activity is:
Client Processes ⇨ Certification ⇨ Woman ⇨ Nutrition Education Plan

1. Click the "Risk/Interventions" tab at the bottom of the screen.

2. Click on the “Open” icon to access “Client Search” and select the client from your ☛ Activity Sheet.
3. Click the “Return with Client” button.
4. Review the information displayed.
5. Double click on a risk to view the “Intervention” pop-up.
6. Click “OK” to close the pop-up.
7. Click on the “Visit Date” field and click the “Insert” icon to add a blank row.
8. Tab to “Risk Code” and select a risk from the drop down list.
9. Tab to the “Risk Level” field and select the change the risk level.
10. Save and exit.

✓ Skill Check:

Retrieve a client for client primary.

Find a partner for this activity. You and your partner will take turns counseling each other on a nutrition education topic. Be sure to use the client name listed on the Activity Sheet.

1. Access the complete “Intervention” for help with the counseling topic you choose.

2. *Print the “Intervention Text” pop-up that you use*. Write your name on the print out and turn it in to the instructor.

✍ Notes:

Chapter 3: Client Processes
Section 4: First Nutrition Education Contact
Lesson: Nutrition Education Provided

Objectives:

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

- select Nutrition Education (NE) topics and materials;
- describe the NE topics and material, their meaning, and how they are organized.

Oregon Policies:

- ♦ Policy 425 Ordering State Produced Materials
- ♦ Policy 800 Nutrition Education: Introduction and Overview
- ♦ Policy 830 Nutrition Education: Documentation
- ♦ Policy 840 Nutrition Education Materials: Evaluation Criteria

Overview:

Accounting for all the nutrition education materials you share with your clients can be overwhelming. TWIST simplifies tracking this information. The "**NE Provided**" screens allow you to document the dates and topics discussed and any materials provided. This, as well as previous certification information, can be reviewed at any time. The client will no longer say, "You gave that handout to me already. Do you have anything different?"

Instruction:

Documenting NE Provided and Materials Provided

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Woman ⇨ Nutrition Education Plan

1. **Click on the "NE Provided" tab at the bottom of the window.**

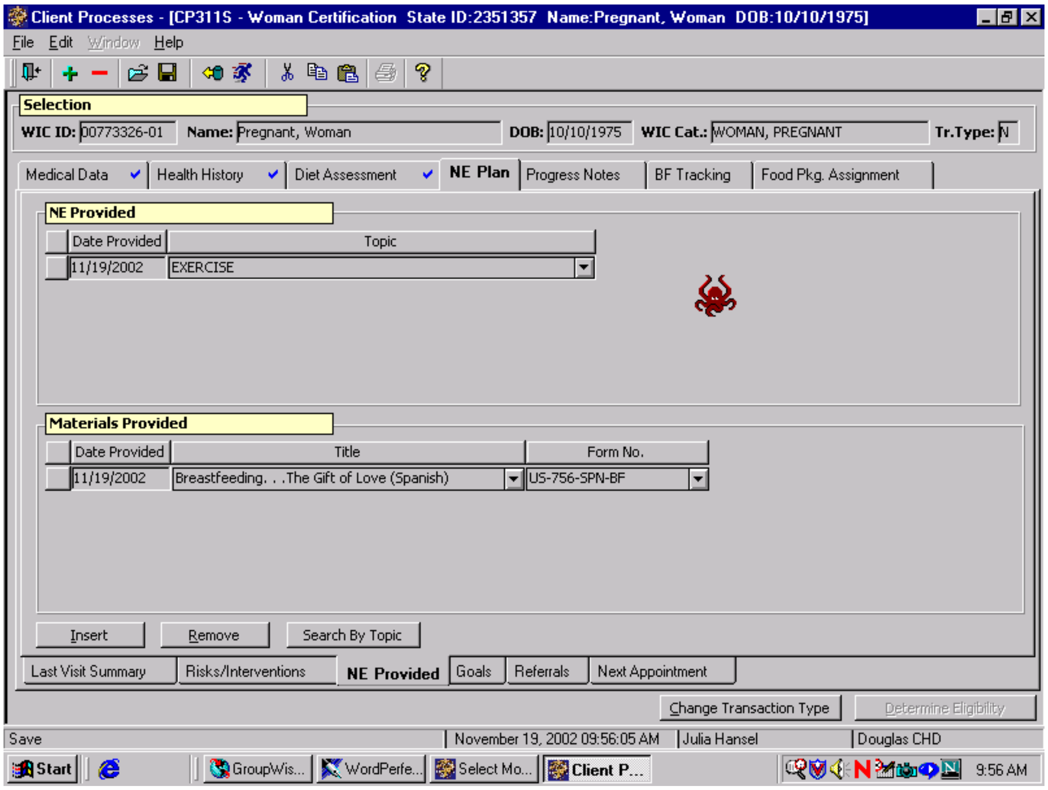

Figure 1: "NE Plan – NE Provided" Screen

2. **Retrieve the client for whom you want to document education provided.**

3. **Click on the "Date Provided" field in the "NE Provided" section.**

   The "**Date Provided**" field defaults to the current date, but may be modified.

4. **Tab to the "Topic" field and select the topic for your client from the drop down list.**

   Click the "**Insert**" icon to add a new row.

5. **Click on the "Date Provided" field in the "Materials Provided" section.**

   This field defaults to the current date, but may be modified.

6. **Tab to the "Title" field and select a material title.**

   The "**Form No.**" field will auto fill with the appropriate form number.

7. **Click the "Search By Topic" button to search for a material by a general topic.**

8. **Select a "Topic", "Sub-Topic", and "Form Title".**

9. **Click "OK" or "Cancel" to close the pop-up.**

10. **Save.**

11. **Exit.**

♫ NOTE: Click on the "**Insert**" button to add a new row.

↪ *Practice Activities:*

Use the information for the client from your ☛ Activity Sheet for this practice.

The starting point for this activity is:
Client Processes ⇨ Certification ⇨ Woman ⇨ Nutrition Education Plan ⇨ NE Provided

1. Retrieve the client for whom you wish to document education provided.
2. Click in the "Date Provided" field and verify the date.
3. Tab to "Topic."
4. Select the appropriate topic.
5. Click the "Date Provided" field in the "Materials Provided" section.
6. Verify the date.
7. Tab to the "Title" field.
8. Select the appropriate handout.
9. Click the "Insert" button to add a new row.
10. Click on the "Search By Topic" button.
11. Select a "Topic", "Sub-Topic" and "Form Title" from the drop down lists.
12. Click "OK" to exit the pop-up.
13. Click the "Remove" button to remove the second row.
14. Save.
15. Exit.

✓ *Skill Check:*

For this exercise you will document additional Nutrition Education provided to a client.

Today you see a new prenatal client. Based on her nutrition risks, document two nutrition education topics of her choice with the appropriate materials provided.

Do a screen print of the "NE Provided" screen. Write your name on the screen print before turning it in to the instructor.

✍ **Notes:**

Chapter 3: Client Processes
Section 4: First Nutrition Education Contact
Lesson: Next Steps

Objectives:

Upon the completion of this lesson all users will be able to:

- operate and print the "Nutrition Education - Next Steps" screen; and
- define the meaning of the status of the participant's nutrition education "Next Step".

Oregon Policies:

- ♦ 820 Nutrition Education: Participant Contacts
- ♦ 830 Nutrition Education: Documentation

Overview:

At the beginning of each certification period we help our clients decide what steps they are willing to take towards improving their health or diet. We call these decisions "Next Steps" to show the steps they are willing to take. Throughout the certification period we assess their progress and, if necessary, redefine the "Next Steps" to ensure they are working for the client. Recording our clients' progress is simplified in TWIST. The "Next Steps" screen provides one location in which the chosen step and the progress on the step is documented. Also available on the screen is the client's nutrition education visit history. This information will be useful as staff track the client's progress towards the change they are working on.

Instruction:

Documenting Next Steps

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Woman ⇨ Nutrition Education Plan

1. **Click on the "Next Steps" tab at the bottom of the screen.**

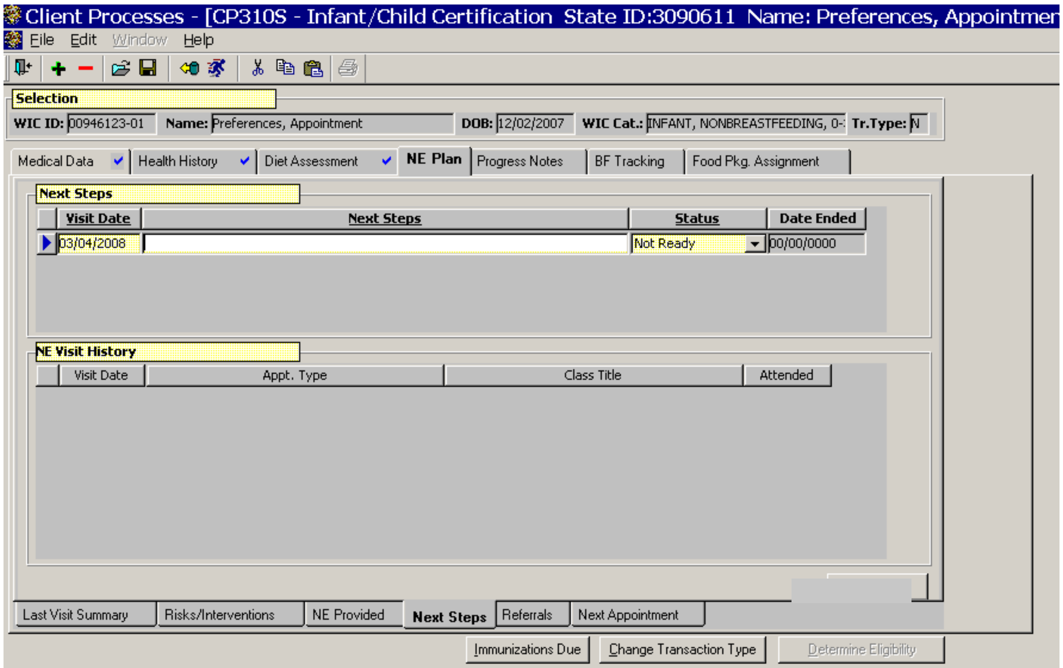

Figure 1: "NE Plan – Next Steps" Screen

2. **Retrieve the client for whom you want to document "Next Steps."**

3. **Click in the "Visit Date" field.**

   This field defaults to the current date but may be modified.

4. **In the "Next Steps" field, enter the step your client has identified.**

   - This is freeform text.
   - If the client has more than one step, click "Insert" icon to add a new row.

5. **Select the appropriate "status" for the step they have identified**.

> ☺ **See Job Aid "Next Steps Statuses" for more information.**

6. **Tab to the "Date Ended" field.**

   When a "Status" is selected which end dates the row, this field defaults to today's date but may be changed.

♫ NOTE: The "**NE Visit History**" displayed in the lower section of the screen is populated from the "Last Visit Summary" screen. This section is display only.

7. **Save.**

8. **Exit.**

✂ Tips and Shortcuts:

- To add additional rows of information click the "Insert" icon.
- Once a row has been saved it may not be removed.

➥ Practice Activities:

Use the client from your ☛ Activity Sheet for this practice.

The starting point for this section is:
Client Processes ⇨ Certification ⇨ Woman ⇨ NE Plan ⇨ Next Steps

1. Click on the "Open" icon to access "Client Search" and search for the client from your ☛ Activity Sheet.
2. Click the "Return with Client" button.
3. Leave the date as today's date.
4. Tab to "Next Step" and enter Increase to 5 servings of fruits and vegetables daily.
5. Change the "Status" to "In Progress".
6. Save your work.
7. Exit back to the "Client Processes" window.

✓ Skill Check:

Retrieve a certified prenatal client.

For this exercise you will be helping your client review Next Steps set at the last appointment. Change the status of her current steps and add a new one.

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Chapter 3: Client Processes
Section 4: First Nutrition Education Contact
Lesson: Referrals

Objectives:

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

- utilize the "Referrals" tab and print referrals.

Oregon Policies:

- ♦ 470 Local Program Outreach
- ♦ 481 Immunization Screening and Referral Protocol
- ♦ 830 Nutrition Education: Documentation
- ♦ 880 Referrals: Alcohol, Tobacco and other Drug Use
- ♦ 885 Other Referrals: Required and Recommended

Overview:

Referring clients to other services is an important part of WIC. In the "Nutrition Education Plan" function you can document all referrals given to a client and print the information for the client to take. This time-saving feature allows you to keep quality records of referrals and provides referral agency information that is available at the click of a button. In this lesson you will learn how to document referrals and print out referral information.

Instruction:

Documenting Referrals

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Woman ⇨ Nutrition Education Plan

1. **Click on the "Referrals" sub-tab at the bottom of the screen.**

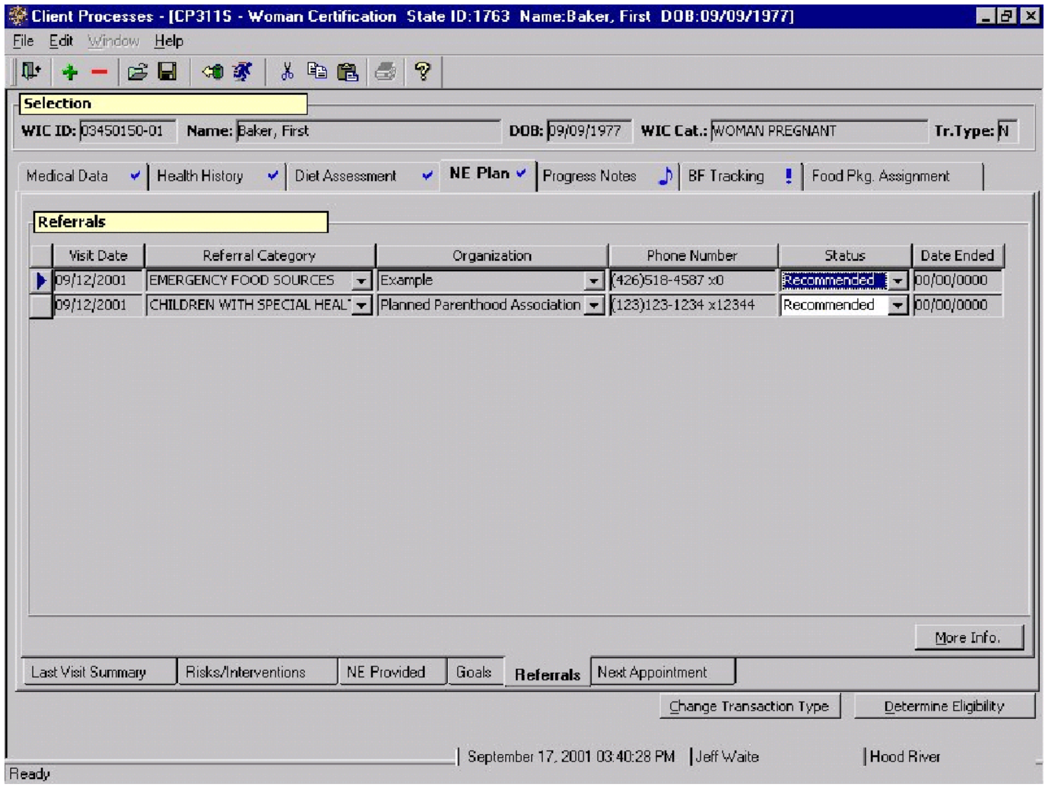

Figure 1: "NE Plan – Referrals" Screen

2. **Retrieve the client for whom you want to document referrals.**

3. **Click in the "Visit Date" field.**

   This field defaults to the current date but may be modified.

4. **On the "Referral Category" field, select the type of referral you want to make.**

   - The referral categories are state populated.
   - Referral categories include, but are not limited to "BreastfeedingServices," "Food Resources," and "Immunizations."

♫ NOTE: The referral information entered on the "Enrollment" screen will carry over to the "NE Plan – Referrals" screen.

5. **Tab to the "Organization" and select the appropriate organization.**

   - The "**Phone Number**" is system generated if the organization information has been completed.
   - More referral organizations can be added. Refer to Chapter 8 Lesson 102 *Referral/Outreach Organizations (SUT)*.

On the "Status" field, select the current status of the referral.

   - The "**Date Ended**" field is grayed out until the "**Status**" is marked as "Completed."
   - When the "**Status**" is marked as "Completed," "Not Addressed," "No Longer Applicable," "Participating," or "Refused" this field defaults to today's date but may be modified.

☺ See Job Aid "Referral Statuses" for more information.

6. **Save.**
7. **Select the organization for which you wish to print referral information.**
8. **Click the "More Information" button in the lower right hand corner of the screen.**

The "**Referrals from WIC**" pop-up is displayed.

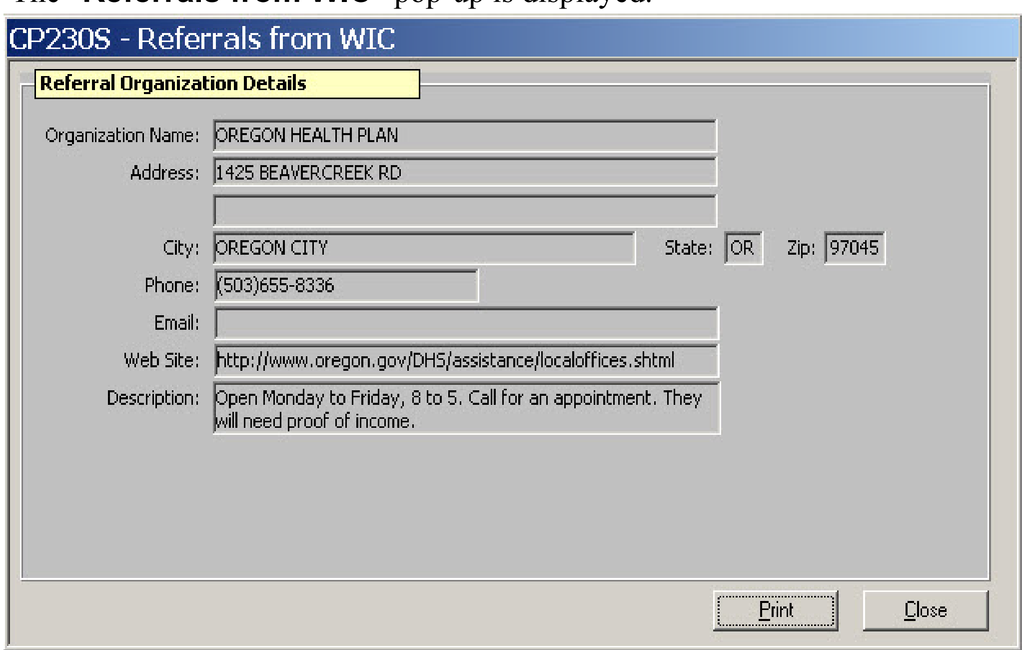

Figure 2: "Referrals from WIC" Pop-Up

9. **Click "Print" to print the referral information.**

10. **Click "Close" to close the pop-up.**

11. **Exit.**

✂ *Tips and Shortcuts:*

- To add additional rows of information, click the "Insert" icon or press tab when in the "Date Ended" field.
- To remove a row of information, use the "Remove" icon.

➥ *Practice Activities:*

Use the client from your ☛ Activity Sheet for this practice.

The starting point for this section is:
Client Processes ⇨ Certification ⇨ Woman ⇨ NE Plan ⇨ Referrals

1. Click on the "Open" icon to access "Client Search" and select the client from your ☛ Activity Sheet.
2. Click the "Return with Client" button.
3. Leave the "Visit Date" field as **today's date**.
4. Tab to "Referral Category" and select **Oregon Health Plan/Medicaid**.
5. Tab to "Organization" and select the appropriate organization.
6. Tab to "Status" and select **Completed** as the "Status."
7. Enter **today's date** in the "Date Ended" field.
8. Click the "More Info." button.
9. Click "Print" to print the referral information and then close the pop-up.
10. Save your work.
11. Exit back to the "Client Processes" window.

You're doing great! Let's try one more set of referrals before we move on.

✓ *Skill Check:*

For this exercise you make two referrals for your client. Retrieve a postpartum client from client primary.

The client is a 20-year-old breastfeeding mother with a six-week-old infant. The mother has just lost her job at a local fast food restaurant, but is hoping to find part-time employment soon. She needs breastfeeding support after hours and weekends and financial support to help her through this difficult period. Make two appropriate referrals for her.

Make printouts with the referral information to give to the client. Write your name on them before turning in to the instructor.

✍ **Notes:**

Chapter 3: Client Processes
Section 4: First Nutrition Education Contact
Lesson: Progress Notes

Objectives:

Upon the completion of this lesson all users will be able to:
- utilize and interpret the "Progress Notes" tab; and
- distinguish between "Progress Notes" and other "Notes" in TWIST.

Oregon Policies:

♦ 830 Nutrition Education: Documentation

Overview:

It is important to document information on each client and TWIST provides you with a variety of screens and pop-ups to ensure all pertinent information is recorded.

There are several "notes" functions in TWIST. Most pertain specifically to the area where they are found. For instance, notes on the anthropometrics screen refer specifically to information found on that screen. Notes in the intake area are available to all staff and would be similar to the sticky notes that we find in all paper charts.

"Progress Notes," however, are free-form medical-record notes in the traditional SOAP format (subjective, objective, assessment, plan) and are to be used primarily by a high-risk counselor for a care plan or by the certifier to note information specific to a person's risk criteria or certification. Information entered in Progress Notes should be information that would not normally be entered in a regular TWIST field.

Instruction:

Documenting Progress Notes

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Woman ⇨ Progress Notes

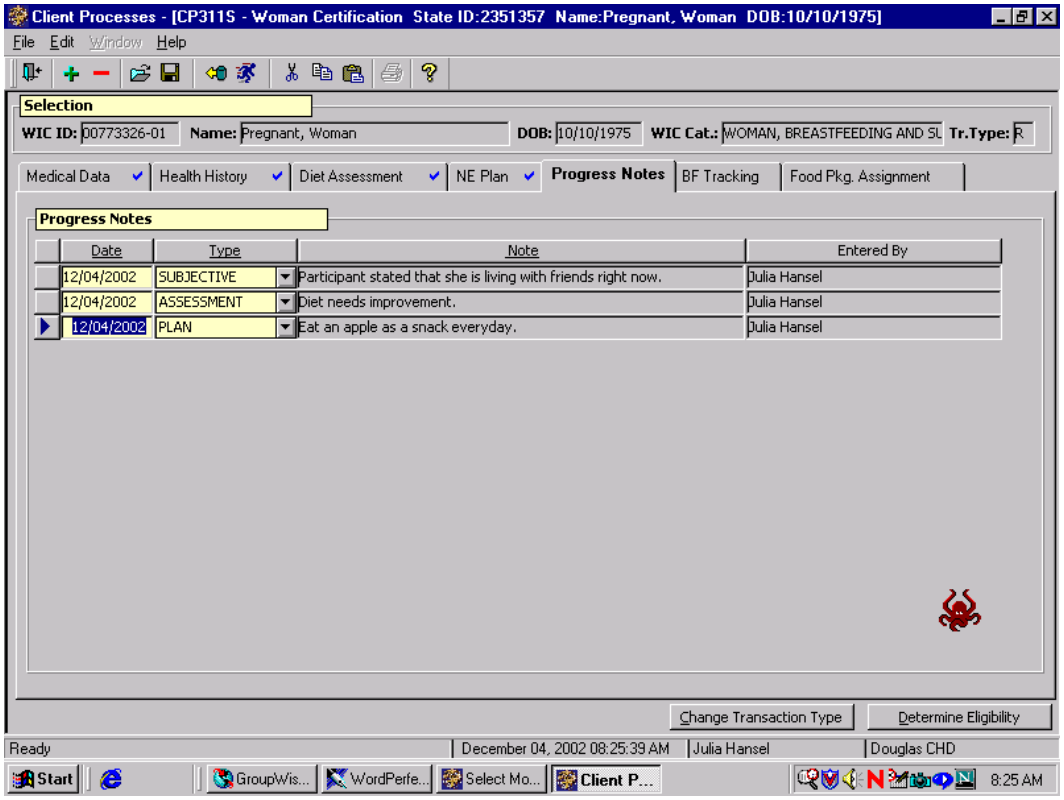

Figure 1: "Progress Notes" Screen

1. **Retrieve the client for whom you want to document a progress note.**

2. **Click in the "Date" field.**

   This field defaults to the current date but may be modified.

3. **Tab to the "Type" field and select the type of note you want to make.**

4. **Double click in the "Notes" field to open the "Notes" pop-up**.

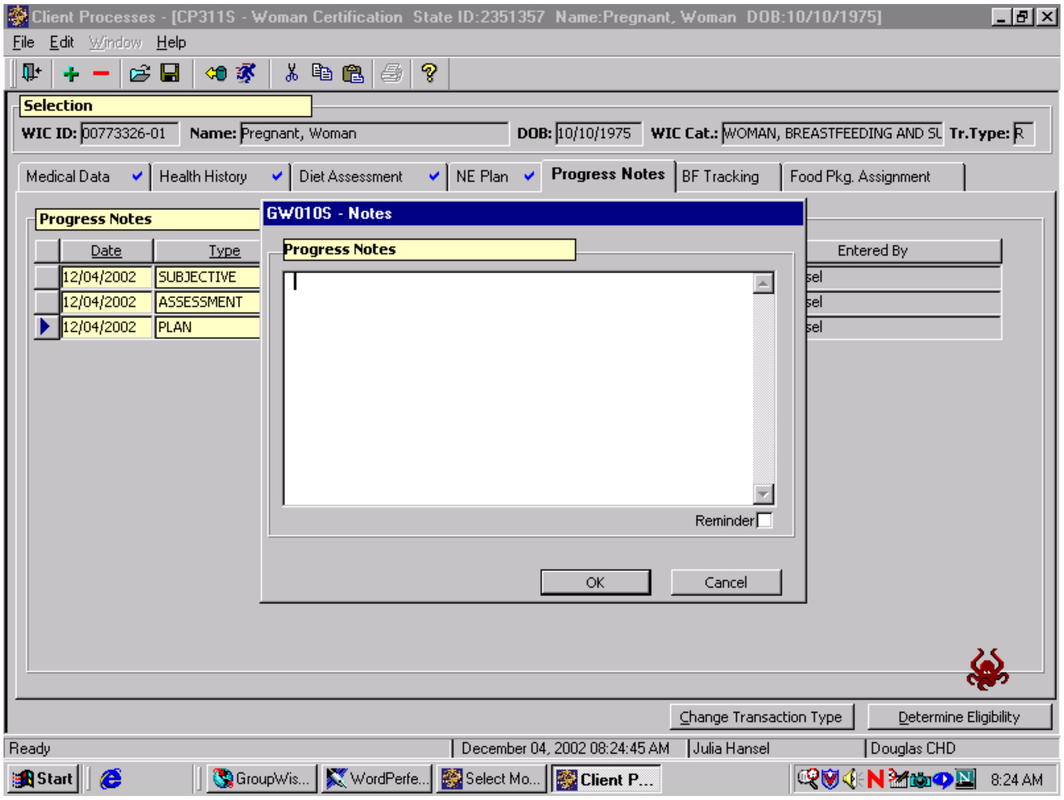

Figure 2: "Notes" Pop-Up

5. **Enter your note.**

- The note is entered in free-form text.
- Once a progress note has been entered, the "Progress Notes" tab will automatically be 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 if the information is "sensitive."
- To mark a note as sensitive, click the "Reminder" box in the lower right-hand corner.
- When a note has been recorded as sensitive, the blue note on the "Progress Notes" tab turns **red**.

6. **Click "OK" to save the note and close the pop-up.**

Click "Cancel" to close the pop-up without saving the note.

♫ NOTE: The "**Entered By**" field is system generated with the user's log on name. This is another good reason not to share your password.

♫ NOTE: To review a note, you can double click in the field. However, to add a note, you must use the insert icon.

7. **Save.**

8. **Exit.**

✂ *Tips and Shortcuts:*

- To add additional rows of information click the “Insert” icon.
- Once a row has been saved it may not be removed.
- Use the Progress Notes Summary Report to print a client’s progress notes.

➥ *Practice Activities:*

Use the client from your ☛ Activity Sheet for this practice.

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

1. Click on the “Open” icon to access “Client Search” and find your client.
2. Click the “Return with Client” button.
3. Leave the date as **today’s date**.
4. Tab to “Type” and select **Assessment**.
5. Tab to “Notes” and double click to open the “Notes” pop-up.
6. Enter the following: “Doing a great job learning the new system!”
7. Click “OK” to save and close the pop-up.
8. Save your work.
9. Exit back to the “Client Processes” window.

You’re doing great! Let’s try another note before we move on.

✓ *Skill Check:*

For this exercise you will enter a note for a client.

This will be a sensitive note. The note should be dated yesterday and indicates that the client is involved in a domestic violence situation. Write the note.

Do a screen print of the window with the “Notes” pop-up opened. Write your name on the screen print before turning it in to the instructor.

Chapter 3: Client Processes
Section 5: Food Packages
Lesson: Assigning and Forecasting Food Packages

Objectives:

Upon completion of this lesson the user will be able to:
- identify and assign food packages;
- forecast a chosen food template to the end of a certification period;
- describe which foods will be assigned in Modules A, B, and C;
- interpret food package template coding;
- define the Food Package Status codes;
- navigate to the "Enrollment" and "Family Summary" screens.

Oregon Policies:

- ♦ 655 Homeless Applicants
- ♦ 713 Breastfeeding: Use of Supplemental Formula
- ♦ 730 Bid Formula: Use and Description
- ♦ 770 Allowable Foods

Other Resources:

WIC Staff Training: Food Package Module

Overview:

Once a participant has been determined eligible for WIC, a food package must be assigned. The "Food Package Assignment" screen allows you to assign the food package to a participant which best meets their nutritional needs. The TWIST system will automatically assign a standard food package with the maximum amount for each food based on the category of each participant. You may change the food package if needed. The "Food Package Assignment" screen will not be enabled until all enrollment and certification screens receive a checkmark. When the "Food Package Assignment" tab receives a completed check mark, benefits can be issued for the participant.

Instruction:

Overview of "Food Package Assignment" Screen

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Food Package Assignment

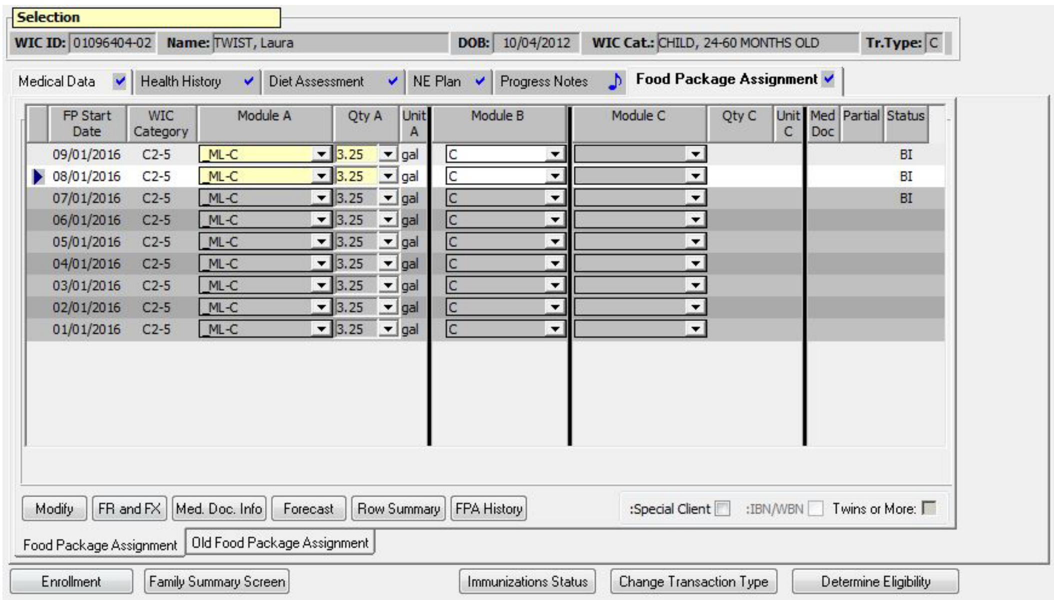

Figure 1: "Food Package Assignment" Screen

Participant Information:

On the top of the screen is the "Selection" section:

- WIC ID number
- Name of the participant
- Participant's date of birth
- WIC category
- Transaction type

Food Package Assignment Information:

The main part of the screen shows the participant's food package information:

- Each row shows the participant's category and food package information for that month.

- Food packages are displayed in chronological order with the past months at the bottom and future months at the top.
- Rows for prior months will be grayed-out.
- Only 6 months of history is displayed. Use the FPA History button to see the archived data.
- The current month is marked with an arrow (line indicator) on the left.
- Participants may have foods in Module A and Module B. Module C is reserved for special formula.

Additional Food Package Assignment Information:

The right part of the screen gives information about food package issuance for each month.

Med Doc:

- Indicates if Medical Documentation is required for that month's food package.
- **R** – Med Doc required but not received
- **Y** – Med Doc required and received
- **Blank** – no Med Doc required
- See Chapter 3, Lesson 503, *"Special" Formula and Medical Documentation* for more information.

Partial:

If a food package is assigned on or after the 20th of each month, this box will be automatically checked, indicating that a partial food package was issued. This box can be unchecked to issue the full package.

Status codes:

- **Blank**: Food package assigned, but no benefits have been issued
- **BI**: Benefits Issued
- **$**: Some Benefits Spent
- **U**: Benefits Updated (needs to be re-issued)
- **FW**: Formula Warehouse (order submitted)
    - See Chapter 3, Lesson 505, *Formula Warehouse*
- **FX**: Formula Exchange
    - See Chapter 3, Lesson 504, *Formula Replacement and Formula Exchange*
- **FR**: Formula Replacement
    - See Chapter 3, Lesson 505, *Formula Replacement and Formula Exchange*

Buttons on the Bottom of the Food Package Assignment Tab:

- **Modify**: To go to the "Modify" pop-up.
    - See Chapter 3, Lesson 501, *Modifying Food Packages"*

- **FR and FX**: To do a Formula Replacement or Formula Exchange
  - See Chapter 3, Lesson 505, *Formula Replacement and Formula Exchange*
- **Med. Doc. Info**: To enter Medical Documentation
  - See Chapter 3, Lesson 503, *"Special" Formula and Medical Documentation*
- **Forecast**: To forecast a food package to future months (see *Forecasting Food Packages* later in this lesson)
- **Row Summary**: To see the history of food package changes for a month.
- **FPA History**: Shows the history of food package assignment for months not displayed (see *Food Package History* later in this lesson)

Client Designation Checkboxes:

The checkboxes on the bottom right of the screen are used for participants who have conditions that change their standard food package.

- **Special Client**: Check this box to assign formula to a child or woman, or to assign extra formula in lieu of foods to an infant over 6 months. See Chapter 3, Lesson 503, *"Special" Formula and Medical Documentation* for more information.
- **IBN, WBN**: Only used for IB & WB (Some Breastfeeding) infant/mother pairs. Checking this box changes the maximum foods allowed for the pair. It allows more formula for the infant and less food for the mother.
- **WBN2**: Only used for a mother who is breastfeeding past 6 months. Checking this box for allows a WB mother whose baby is receiving more formula than allowed for the "Mostly Breastfeeding" category to remain on WIC to receive breastfeeding education and support, nutrition education and other services.
- **Twins or More**: The box displays a checkmark if "Twins or More" is checked on the "Medical Data" screen for a woman. It will increase the maximum foods for the woman to the "twins/multiples" amount.

Old Food Package Assignment Sub-Tab:

This tab displays the food packages assigned and printed prior to the eWIC conversion

Navigation Buttons:

The buttons on the bottom of the screen are used to go directly to other screens.

- Enrollment
- Family Summary Screen
- Immunization Status
- Change Transaction Type
- Determine Eligibility

Assigning Food Packages

Food packages are assigned in three modules - A, B, and C. At least one module is always mandatory.

Module A ➔ milk or formula templates
Module B ➔ food templates
Module C ➔ special formula templates

Each category has a "Standard Food Package" that is automatically assigned by TWIST.

☺ **See Job Aid "Standard Food Packages"**.

It is easy to make small changes to the food package by selecting a different template within a module.

☺ **See Job "Food Packages and Template Codes"**.

1. Retrieve the participant for whom you wish to assign a food package.

Their current food package assignment is displayed.

- For most participants, Module A and Module B automatically default to the "standard food package" for their category.
- The future food package assignments show through the end of their certification period.
- If a participant will be in two different categories during their certification period (for example, Infant to Child), TWIST will automatically assign the standard food package for each category.

If the Standard Food Package does not meet the participant's needs:

2. Select a "non-standard" food package template by clicking the drop down arrow next to the template code in Module A or B.

- In the drop down list, food templates are displayed in alphabetical order by the food template code.

- TWIST will only display templates available for the participant's category.
- "Z" or "ZN" templates are displayed for participants who do not receive food or formula.

3. **Select different quantities of milk or formula by clicking the drop down arrow next to the quantity.**
   - Quantities will display in defined amounts.
   - You can adjust by smaller amounts by using the up and down keys on your keyboard.
   - For "some or mostly breastfeeding (IB)" infants, the standard bid powdered cow's milk formula will default with a quantity of 1 can. You will need to select the appropriate amount of formula from the drop down list.

4. **To make other changes, click the "Modify" button to open the "Modify" pop-up.** See Chapter 3, Lesson 501, *Modifying Food Packages.*

   - Select other types of milk (evaporated, powdered, half gallons).
   - Change the quantity of foods in Module B.
   - Remove foods from the food package.
   - Make more specific quantity changes.

5. **Save.**

♫ NOTE: Any changes to the standard package should be forecasted to future months. (see below)

♫ NOTE: After assigning the food package, you must go to the "Family Summary" screen to issue the benefits. This screen is described in Chapter 3, Lesson 1100, Family Summary Screen.

Forecasting Food Packages

Forecasting is usually used when assigning a non-standard food package. It is used to assign the selected template to the end of the certification period.

- You can select the row for whichever template you want to forecast, including a future month.
- Partial packages cannot be forecasted.
- Grayed-out rows (past months) cannot be forecasted.
- Modules shown as "modified" cannot be forecasted.

♬ NOTE: There are some times when TWIST cannot forecast formula amounts for mostly or some breastfeeding infants (IB). If the formula amount does not forecast, adjust the amount in future months by using the drop down arrows for quantity.

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Food Package Assignment

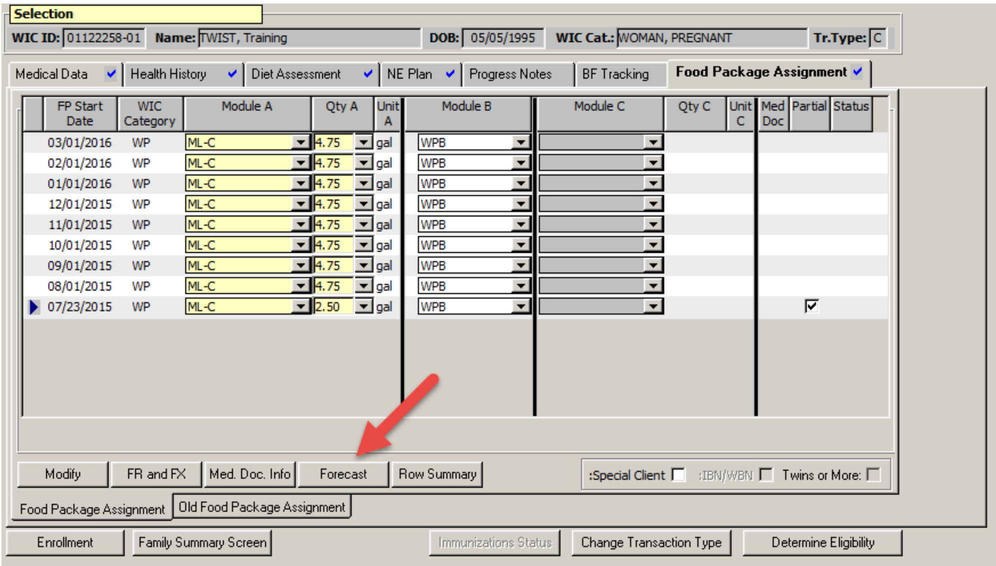

Figure 2: "Forecast" button

1. **Retrieve the participant for whom you wish to forecast a food package.**

2. **Select the row to forecast from.**

3. **Click on the "Forecast" button to apply the chosen row to future months. The "Select Modules to Forecast" pop-up will appear.**

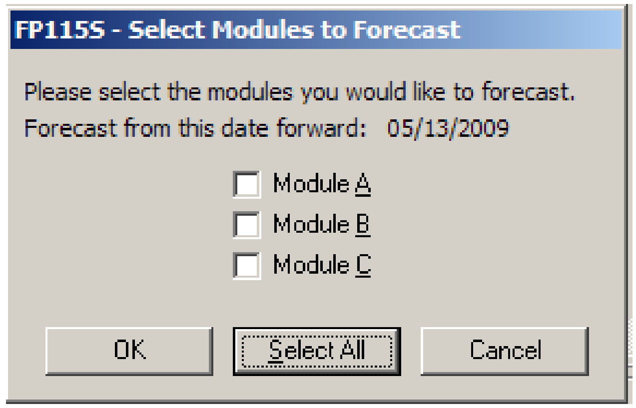

Figure 3: "Forecast" Pop-Up

4. **Select the module(s) you would like to forecast. Click "OK".**

- Clicking on "Select All" in the forecast pop up will allow you forecast all three modules at one time.
- Clicking "Cancel" closes the pop-up without making any changes.

♬ NOTE: Food packages will forecast for as long as it is appropriate for the participant's category.

5. **Save.**

♬ 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:*

Z Packages

- Module codes which begin with Z indicate the participant is not receiving milk, formula or foods in that module.
- Z or ZN can be used in mandatory module fields if the participant is not receiving any foods from that module.
- "Z" can be assigned to a fully breastfed infant who does not receive any formula in Module A.
- "ZN" can be assigned to a participant not receiving any milk, foods or formulas in a particular module.

Child Foods During the Month of the Infant's First Birthday

- See Chapter 3, Lesson 501, *Modifying Food Packages* for more information.

"Some or Mostly Breastfeeding Infant (IB)" Category for Infants in First Month

There is no "some or mostly breastfeeding (IB)" category option for infants in their first month, so formula can only be assigned to breastfeeding infants after the infant is one month old.

Women Fully Breastfeeding Multiples

There are special instructions for assigning the food package for women who are fully breastfeeding multiple infants (twins or more). See the **Job Aid: WE-M – Assigning the Food Package**.

Food Package History

Six months of history is displayed on the "Food Package Assignment" screen. Information older than 6 months is archived – it is stored in TWIST, but not displayed.

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Food Package Assignment

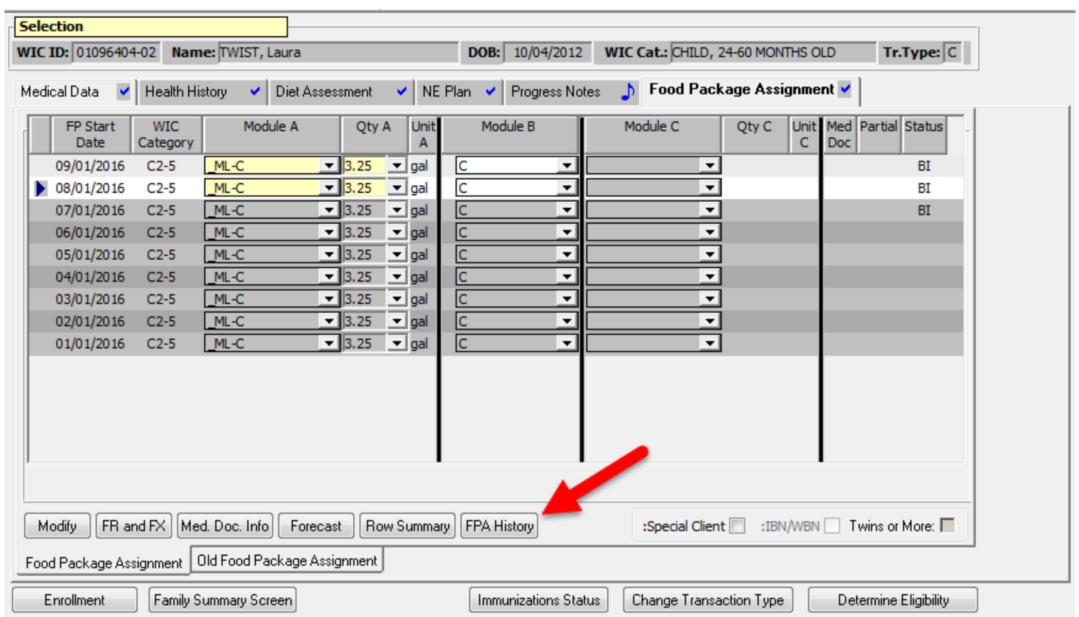

Figure 4: "FPA History" Button

1. To view archived food package information, click the "FPA History" button. The "Archived Benefits" pop-up will appear.

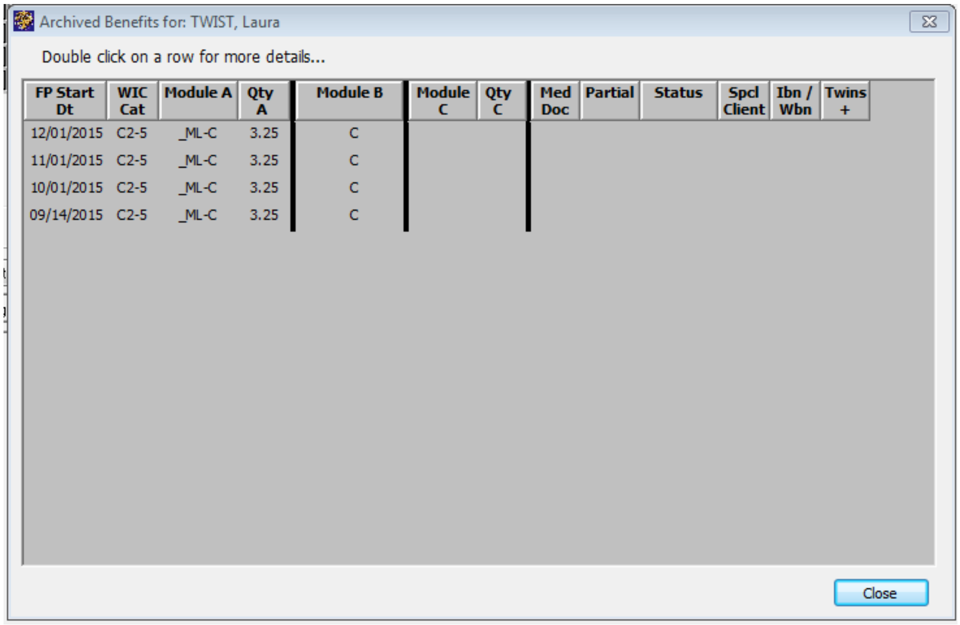

Figure 5: “Archived Benefits” Pop-Up

2. To view specific foods assigned for an archived month, double click the month row to display the foods. The “Subcategories for Benefits” pop-up will display the specific foods assigned for the selected month.

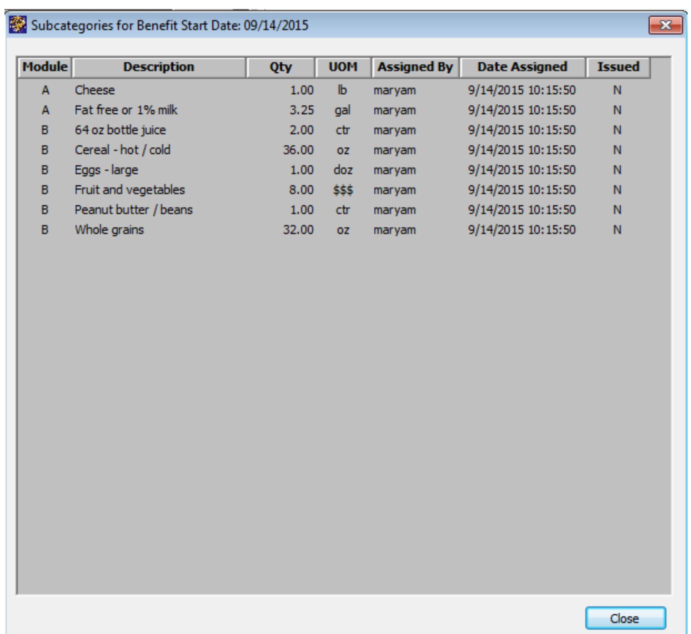

Figure 6: “Subcategories for Benefit” Pop-Up

3. Close to return back to the FPA screen.

NOTE: Historical voucher assignments can be viewed on the “Old Food Package Assignment” screen.

✍ Notes:

Chapter 3: Client Processes

Section 5: Food Packages

Lesson: Modifying Food Packages

Objectives:

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

- use the “Modify” screen to assign different foods and quantities.

Oregon Policies:

- ♦ 655 Homeless Applicants
- ♦ 713 Breastfeeding: Use of Supplemental Formula
- ♦ 730 Bid Formula: Use and Description
- ♦ 770 Allowable Foods: Women and Children

Overview:

TWIST automatically assigns the standard food package to all participants. If a participant needs different foods, the first step is to see if a non-standard template would meet their needs. If not, the user can modify the food package to meet the participant’s individual needs.

The modify pop-up is also used to change benefits during the month if the participant has spent some benefits during the current month.

Instruction:

Modifying Food Packages

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Food Package Assignment

1. **Retrieve the participant for whom you wish to modify a food package.**

2. **Check the Module A and Module B template drop down lists for a template that meets the participant’s need.**

> ☺ **See Job Aids “Modifying Food Packages” and “Food Packages and Template Codes”**.

3. **If there is not a template to meet their needs, place the row indicator on the month to modify and click the "Modify" button to open the "Food Assignment Modify" screen.**

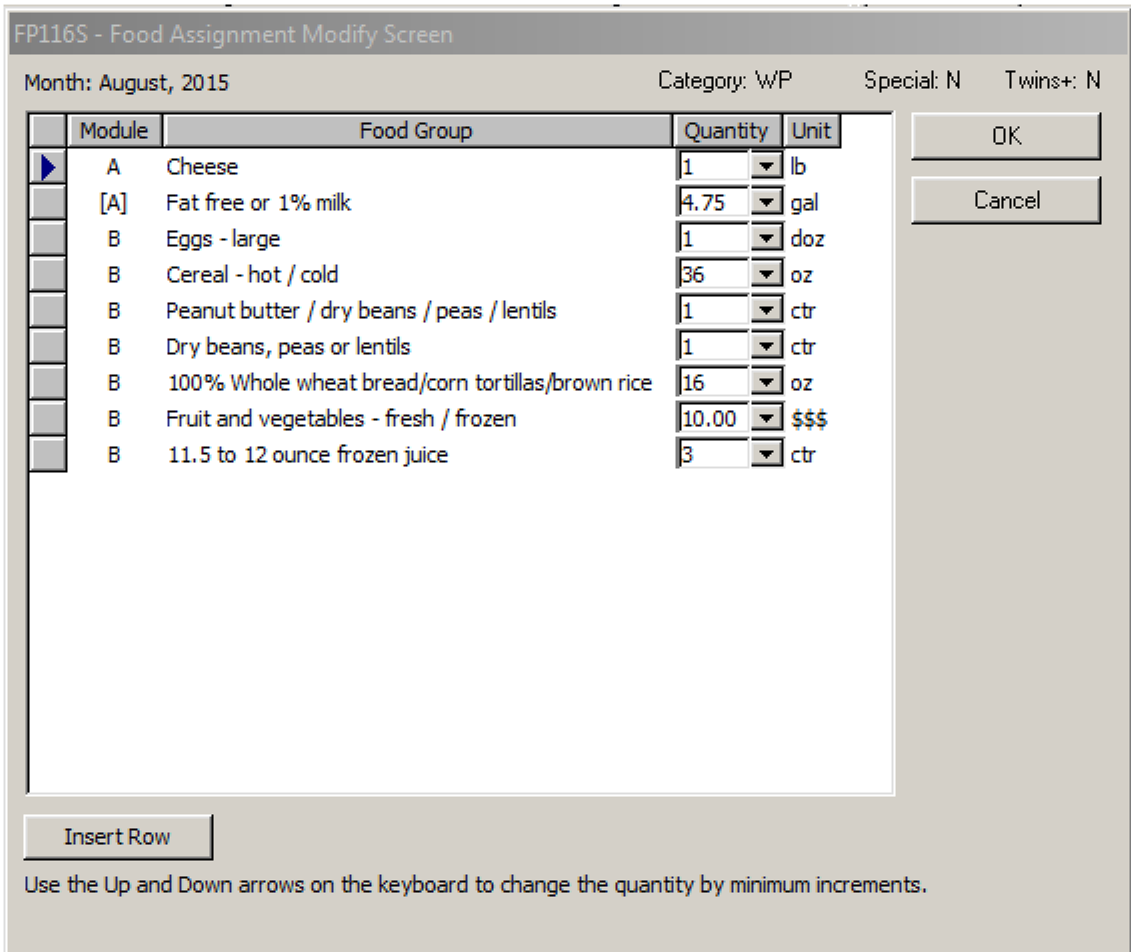

Figure 1: "Food Assignment Modify" Screen

- The "Modify" screen displays the currently assigned food package for the month indicated.
- The screen indicates which Module each food is in, the food description, quantity currently assigned, and unit of measure.

3. **To change the quantity of food, use the drop down arrows.**
   - Quantities will display in defined amounts. To increase or decrease by smaller amounts, use the up and down arrows on the keyboard.

4. **To remove a food or formula from the food package, change the quantity to "0".**

5. **To add a food not currently assigned, click the "Insert Row" button.**
    - Only foods available to the participant's category will display.
    - You can search for a food by typing the name into the subcategory search field at the top of the pop up.

♬ NOTE: In most cases, you will need to decrease the quantity of a food to replace it with a different food in the same grouping. These groupings include:

- Milks, cheese, yogurt, tofu and soy beverage.
- Peanut butter and beans.
- Juices.
- Baby food and infant fresh fruits and vegetables.

Example: To increase the quantity of evaporated milk, you must first decrease the quantity of other milks and/or cheese.

6. **Click "OK" to assign the modified food package and return to the "Food Package Assignment" screen.** Click "Cancel" to return without making changes.

- If the food package is unique, the word "modified" will display as the template name on the "Food Package Assignment" screen.
- If the quantity of food in Module B has been reduced to below the maximum, an asterisk (*) will display before the template name on the "Food Package Assignment" screen.

7. **If needed, forecast the change.**

- If the food package is unique (no template), the "modified" package cannot be forecasted. Modify the package for each future month it is needed.
- If the food package has a template, choose the correct template for the following month and forecast from that month. See *Chapter 3, Lesson 500, Assigning and Forecasting Food Packages*.

8. **Save.**

♬ **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*.

Child Foods During the Month of the Infant's First Birthday

- When assigning food packages during the month of an infant's first birthday, the system will default to the infant food package.
- The foods can be changed to child foods if:
    - The infant is on or past their first birthday,and
    - They have not spent any of the infant food package, including fresh fruits and vegetables.
- If the infant has spent foods from the infant food package, they cannot change to the child food package. The "Change to Child Foods" button will not be available.
- **Once the child foods are assigned, they cannot be changed back to infant foods.**

♬ **NOTE**: Do you know ahead of time that the family wants child foods when the baby turns 1? It is okay to NOT issue the baby's 12th month infant benefits to help protect from spending them. Have the family call on or after the infant's first birthday - the CPA can make the change to child foods and issue the benefits over the phone.

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Infant/Child
⇨ Food Package Assignment

1. **On or after the first year birthday, retrieve the infant for whom you wish to change to child foods.**

2. **Open the "Modify" pop-up for the month the infant turns one year and click the "Change to Child Foods" button.**

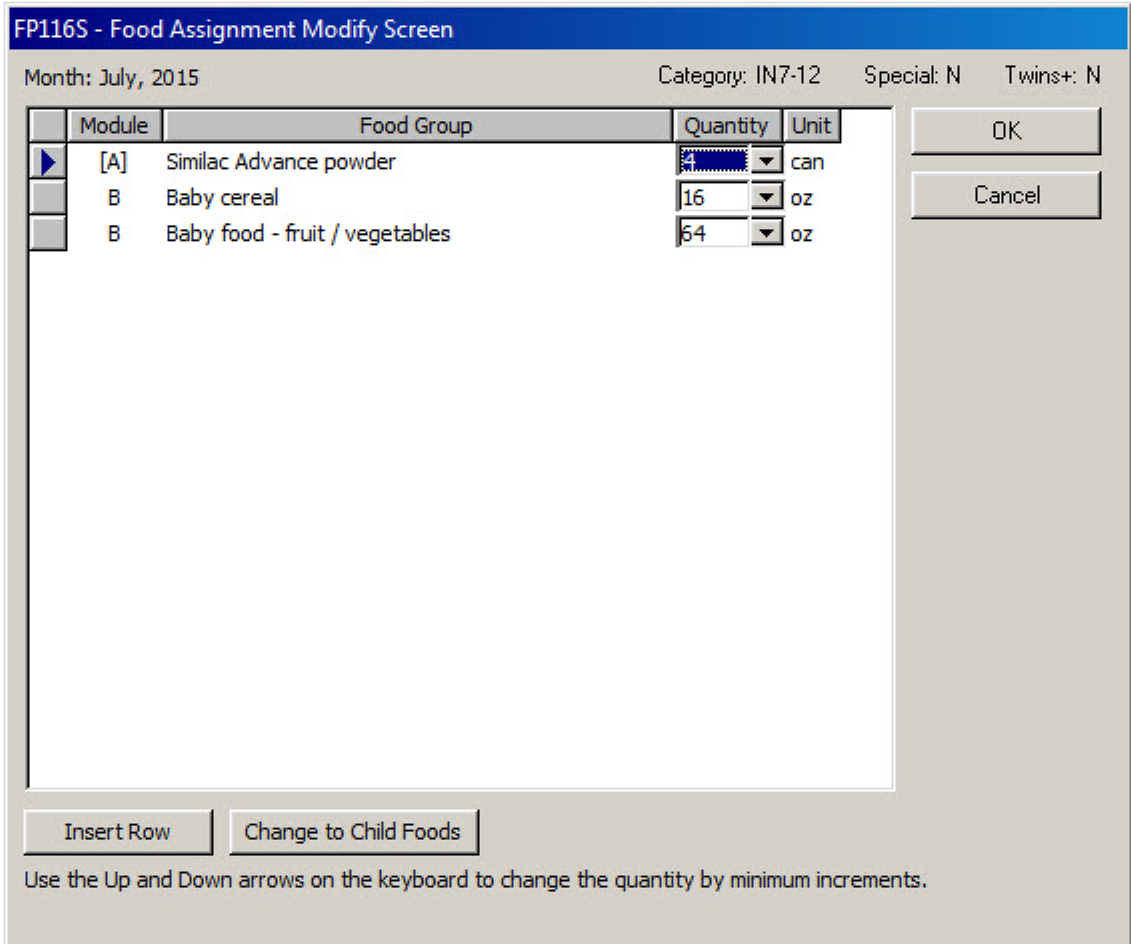

Figure 2: "Change to Child Foods" Button

3. **Click "OK" and return to the Food Package Assignment screen and choose a milk template in Module A and a food template in Module B.**

4. Save.

♬ 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:

Notes:

Chapter 3: Client Processes
Section 5: Food Packages
Lesson: Changing Food Package Mid-Certification

Objectives:

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

- change a food package mid-certification.

Oregon Policies:

♦ 560 {New Policy Name}

Overview:

There are times during a certification period when you may need to change a participant's food package. This can happen by participant request, or when you find out that the participant needs different foods to meet their needs. In this lesson you will learn how to make those changes.

For a food package change that happens because of a *category change*, see Chapter 3, Lesson 806, *Category Change* (for example, pregnant woman delivers or changes in breastfeeding status).

Changing a Food Package:

No Benefits are Spent for the Current Month

♬ NOTE: On the *Food Package Assignment* screen, if there is NOT a "$" in the status row for the current month, then no benefits have been spent.

☺ **See Job "Modifying Food Packages"**.

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Food Package Assignment

1. **Click on the "Open" icon and retrieve the participant for whom you want to change the food package.**

2. **Click the drop down menu next to Module A and/or Module B to select new templates.**

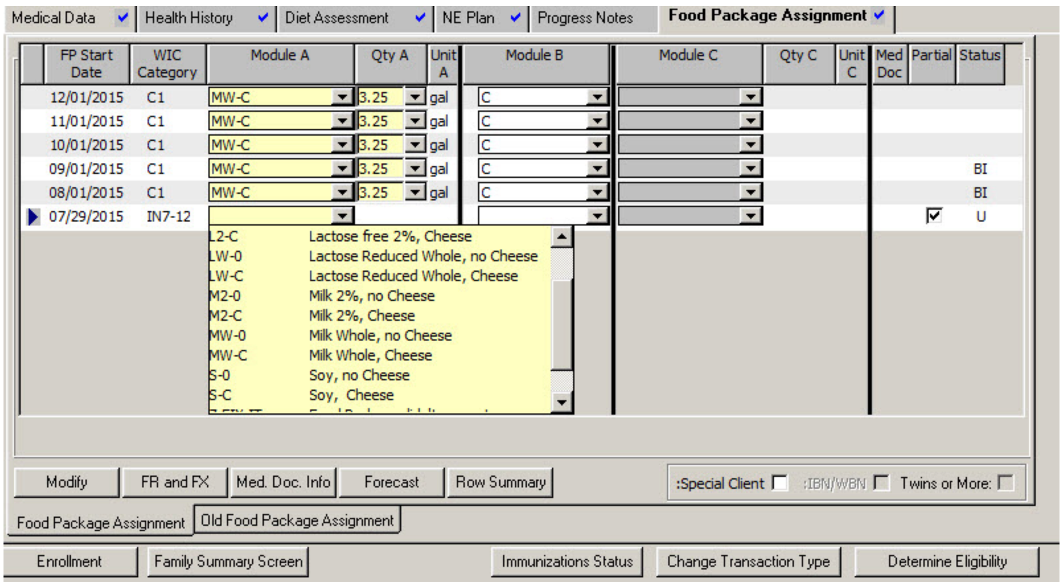

Figure 1: "Food Package Assignment" Screen.

3. **Click the "Forecast" button to forecast the new templates for the rest of the certification period.**

See Chapter 3, Lesson 500, *Assigning and Forecasting Food Packages* for more information.

4. **Save.**

5. **Go to the "Family Summary" screen to issue the new benefits.**

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

Changing a Food Package:
$ Benefits are Spent for the Current Month

♬ NOTE: If benefits have been spent for the current month, changes must be made on the “Modify” screen. On the *Food Package Assignment* screen, look for the “$” in the status row for the current month to show if benefits have been spent.

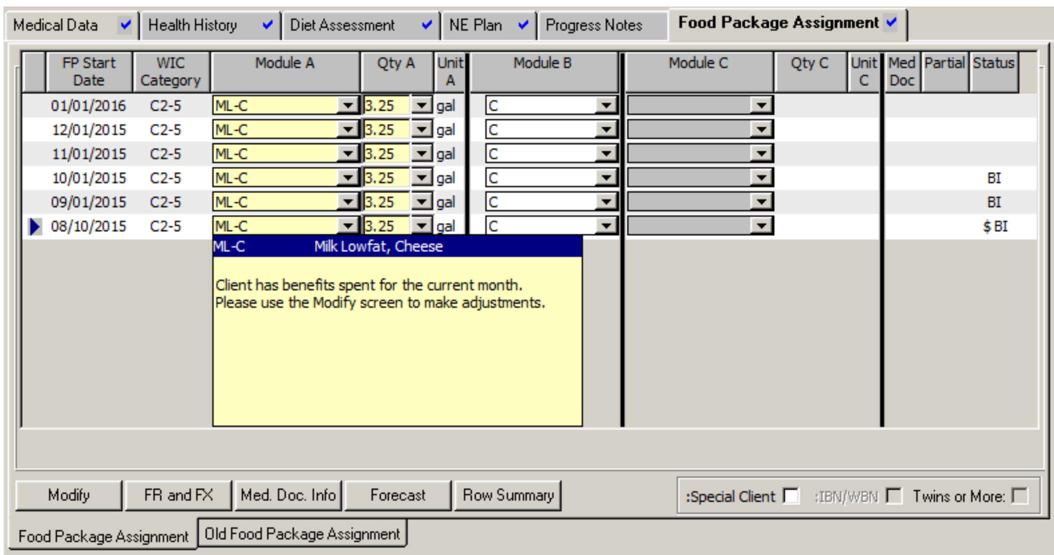

Figure 2: Message about Spent Benefits

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Food Package Assignment

6. **Click on the “Open” icon and retrieve the participant for whom you want to change the food package.**

7. **Click the “Modify” button to change the food package for the current month.**

- To remove a food or formula, select the food from the list then select the smallest amount (0 or the amount already spent). TWIST will display the amount originally assigned, but will not let you reduce the amount below what was already spent.
- To add a food, click the "Insert Row" button and select the new food or formula.
- You can adjust the food quantity on the drop down.
- TWIST will adjust the maximum food amounts for spent benefits.
- For more information about using the "Modify" screen, see Chapter 3, Lesson 501, *Modifying Food Packages*.

8. **To forecast the change:**
   - You cannot forecast from the current month because of spent benefits.
   - If the new food package has a template, select the template for the **next** month and forecast from that month.
   - If the new food package does not have a template, manually change all future months as needed.

♬ NOTE: See Chapter 3, Lesson 500, *Assigning and Forecasting Food Packages* and Chapter 3, Lesson 501, *Modifying Food Packages* for more information.

9. **Save.**

10. **Go to the "Family Summary Screen" to issue the benefits.**

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

✍ **Notes:**

Chapter 3: Client Processes
Section 5: Food Packages
Lesson: "Special" Formula and Medical Documentation

Objectives:

Upon completion of this lesson the user will be able to:
- assign formulas needing medical documentation
- document medical documentation forms appropriately

Oregon Policies:

- ♦ 760 Medical Formulas and Nutritionals
- ♦ 765 Medical Documentation
- ♦ 769 Assigning WIC Food Packages, Appendix C

Other Resources:

Staff Training: Food Package Module

Overview:

"Special" food packages are for women, infants and children who have a documented medical condition that requires the use of infant formula, medical formula or nutritionals. Some of these medical formulas can be delivered directly to the participant from a special vendor, the Formula Warehouse.

Instruction:

Assigning Formula to Women and Children

Women and children with medical documentation can be assigned formula (standard or medical) if they meet the criteria in *WIC Policy 769: WIC Food Packages*. If a child or woman requires formula, you must first flag them as "Special" on the "Food Package Assignment" screen.

The starting point for this lesson is:

> Client Processes ⇨ Certification ⇨ Woman or Infant/Child ⇨ Food Package Assignment

1. Click on the "Open" icon and retrieve the woman or child for whom you want to assign formula.

2. Click the "Special Client" checkbox.

- Module C will be activated.

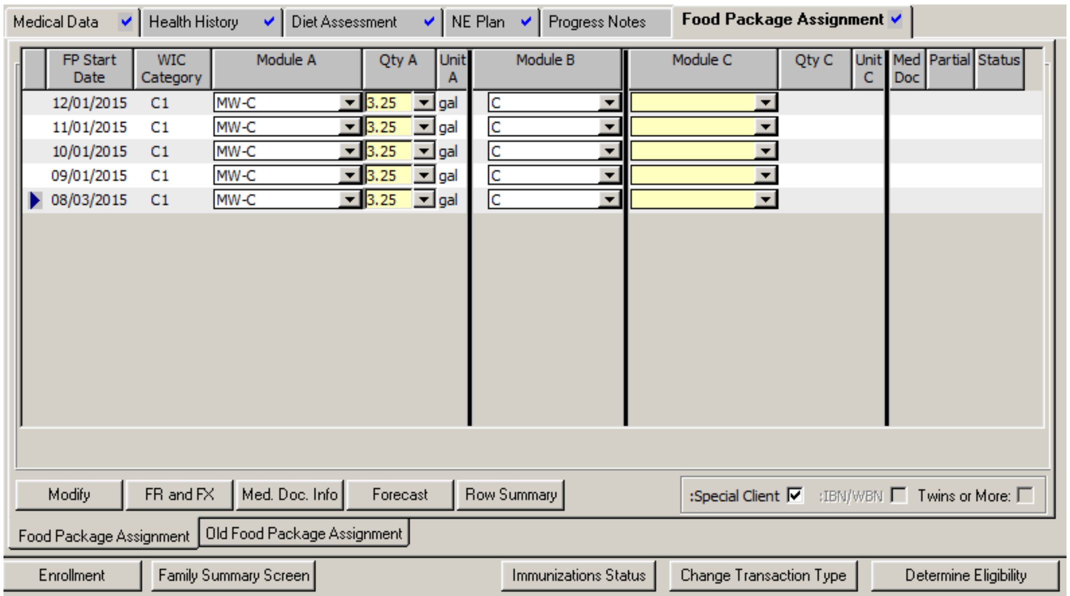

Figure 1: Module C Activated for Special Client

3. Click the template drop down arrow in Module C to select the formula.

- The most commonly used formulas are listed in the drop down.
- The full list of formulas is found by opening the "Modify" screen and using the "Insert Row" button to choose a formula.

4. Select the quantity of formula needed.

♬ NOTE: An "R" will appear in the "Med Doc" status to indicate that medical documentation is required for this formula.

5. If this formula will be assigned for the future, forecast the formula into future months.

6. Enter the Medical Documentation

- See "Medical Documentation" later in this lesson.

7. Save.

♬ 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*.

♬ NOTE: If the formula will be ordered through the Formula Warehouse , follow the instructions in Chapter 3, Lesson 505, *Formula Warehouse*.

Assigning Medical Formula to Infants

In WIC, medical formulas refers to any formula that is not the milk-based or soy-based bid formula and requires a medical documentation form to be completed. Infants with medical documentation can be assigned a special medical formula if they meet the criteria in *WIC Policy 769: WIC Food Packages*. WIC policy allows one month of special medical formula to be issued before the medical documentation is entered into TWIST.

♬ NOTE: Non-breastfeeding infants (IN) who are 7-12 months old, can receive additional formula if they are unable to eat food. The "Special Client" checkbox is NOT used for breastfeeding infants or infants younger than 7 months.

The starting point for this lesson is:

> Client Processes ⇨ Certification ⇨ Infant/Child ⇨ Food Package Assignment

8. Click on the "Open" icon and retrieve the infant for whom you want to assign medical formula.

9. Click the template drop down arrow in Module A to select the new formula.

- The most commonly used formulas are listed in the drop down.
- The full list of formulas is found by opening the "Modify" screen and using "Insert Row" to choose a formula.

10. Select the quantity of formula needed.

♬ NOTE: An "R" will appear in the "Med Doc" status to indicate that medical documentation is required for this formula.

11. If this formula will be assigned for the future, forecast the formula into future months.

12. Enter the Medical Documentation

- See “Medical Documentation” later in this lesson.

13. Save.

♬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*.

♬NOTE: If the formula will be ordered through the Formula Warehouse follow the instructions in Chapter 3, Lesson 505, *Formula Warehouse*.

Med Doc Status

A Medical Documentation (Med Doc) form from the participant’s health care provider is required to issue certain food packages. For example, certain medical formulas for women and children require medical documentation before they may be issued. The information on this form will be documented in the “Medical Documentation” pop-up. For more information on which food packages require medical documentation refer to the *Food Package* staff training module and *Oregon WIC Policies 760, 765 and 769*.

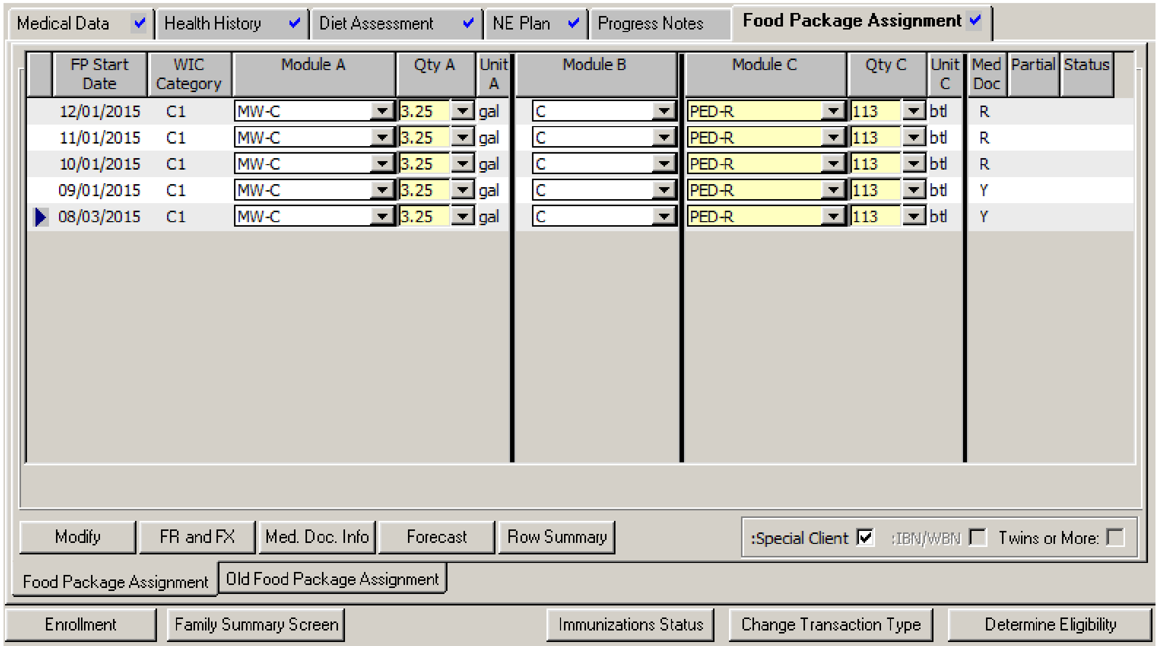

Figure 2: "Food Package Assignment" Showing Med Doc Status

"Med Doc" Status:

R: Required.

- Medical Documentation is required for this food package.
- Medical Documentation has not been entered.
- Food package issuance limited to one month.

Y: Yes.

- Medical Documentation is required for this food package.
- Medical Documentation is complete.
- Food package can be issued for months indicated with "Y".

Entering Medical Documentation

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Woman or Infant/Child ⇨ Food Package Assignment

1. Retrieve the participant for whom you want to enter Medical Documentation

2. Select the row for the first month of the food package which requires Medical Documentation.

3. Click the "Med Doc Info" button.

- The "Medical Formulas" section displays the medical formula from the row selected on the "Food Package Assignment" screen.

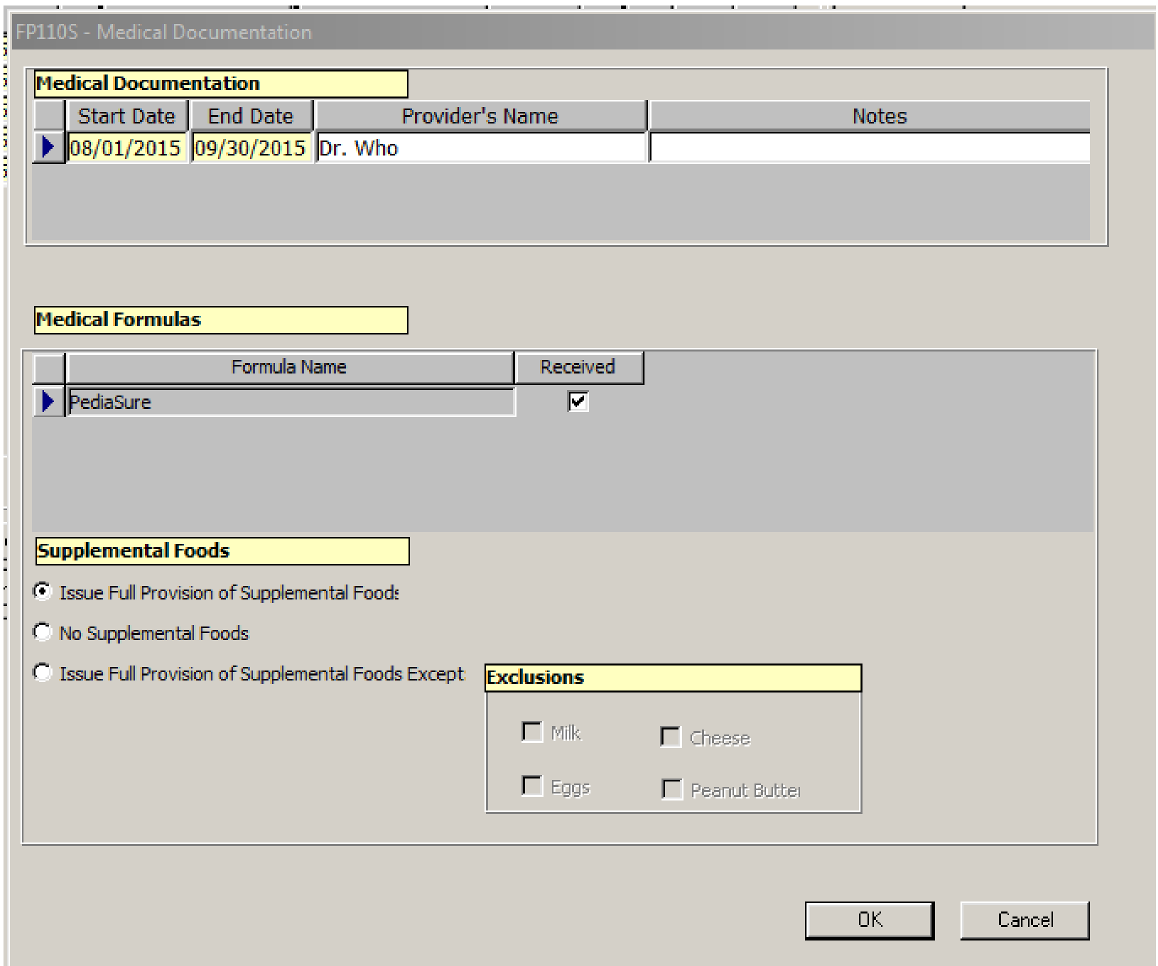

Figure 3: "Medical Documentation" Pop-Up

4. Enter the start date and end date for use of this formula indicated on the medical documentation form.

5. Enter the health care provider's name.

6. Click in the notes field to enter a note, if needed.

7. Click the received box next to the formula if it matches the documentation from the health care provider.

8. **If the health care provider has excluded foods, enter the information in "Supplemental Foods."**
    - This documents the Health Care Provider's instructions, but will not prevent issuing food.
    - It is recommended to document the excluded foods in Progress Notes.

9. **Click "OK" to save the information and return to the "Food Package Assignment" screen.**

    When the "Med Doc Info" is complete, the "Med Doc" status field on the "Food Package Assignment" screen will change to "Y" for the date range entered.

10. **Make any necessary adjustments to the food package based on the health care provider's instructions (e.g. food exclusions).**

11. **Save.**

♪ NOTE: If two medical formulas share the same date range, then the Medical Documentation section will have only one line and both formulas will appear in the "Medical Formulas" section.

✂ *Tips and Shortcuts:*

You cannot designate a WBN or IBN as "special." You must first change their category to WB/IB or WN/IN, whichever is most appropriate.

✍ *Notes:*

Chapter 3: Client Processes
Section 5: Food Packages
Lesson: Formula Exchange (FX) and Formula Replacement (FR)

Objectives:

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

- Process formula returned to the clinic;
- Issue new formula to replace the returned formula; and
- Issue new formula when formula has been spent but no cans are returned.

Oregon Policies:

- ♦ 511 Food Benefit Issuance
- ♦ 561 Program Integrity – Replacing Benefits
- ♦ 735 Handling of Returned Formula

Other Resources:

Staff Training: Food Package Module

Overview:

The "Formula Replacement and Formula Exchange" screen is used when the client has already spent formula benefits for the current month and needs to replace the spent formula.

Instruction:

Formula Exchange

Formula exchange is used when:

- participants have spent part or all of their current month of formula benefits,
- **they are returning unopened cans of formula to the clinic**, and
- WIC will re-issue benefits for a different formula.

The starting point for this lesson is:

> Client Processes ⇨ Certification ⇨ Woman or Infant/Child ⇨ Food Package Assignment

1. **Retrieve the participant for whom you wish to exchange formula.**

2. **Place the row indicator on the current month and click the "FR and FX" button to open the "Formula Exchange/Replacement" pop-up.**

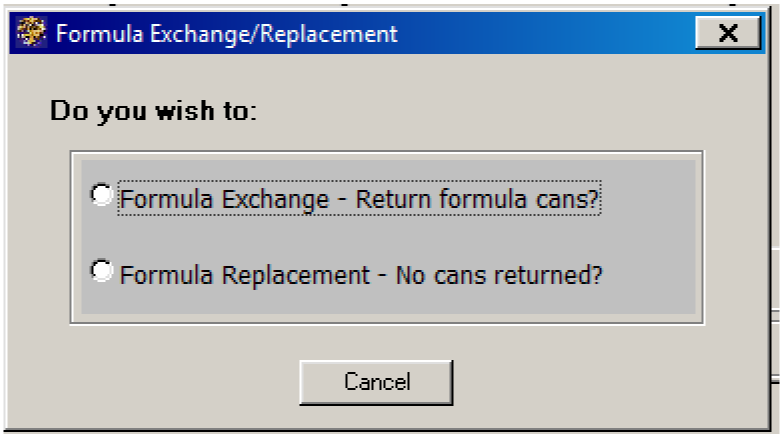

Figure 1: "Formula Exchange/Replacement" Pop-Up

3. **Select "Formula Exchange."**

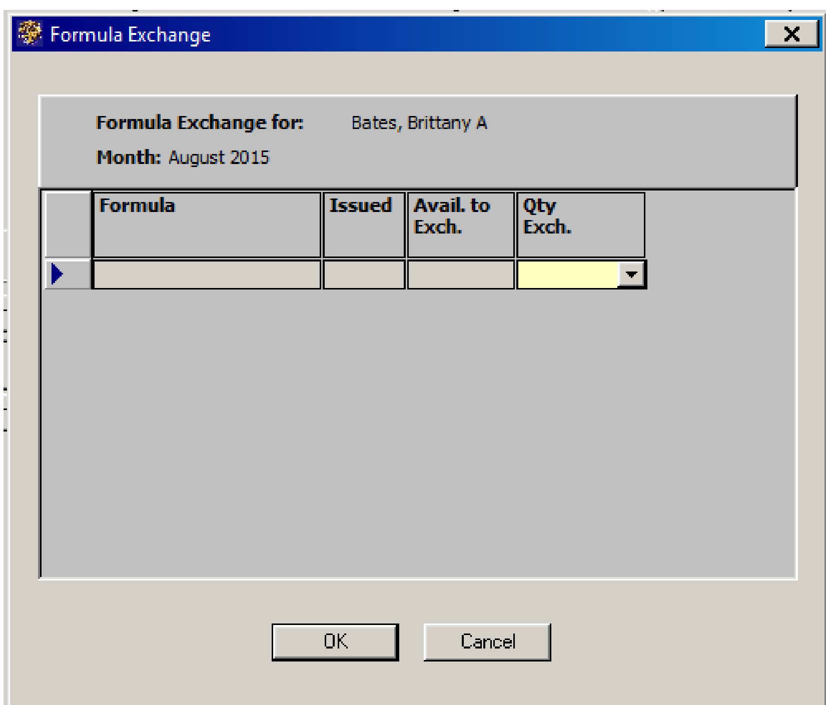

Figure 2: Formula Exchange Pop-Up

4. **Enter the quantity of formula the participant is returning to the clinic and click "OK."**

5. **If all the spent formula has been returned, on the "Food Package Assignment" screen use the drop down in Module A to assign the new formula.**

6. **If only some of the spent formula has been returned, use the "Modify" screen to assign the new formula.**
    - Click the "Modify" button to open the "Modify" pop-up.
    - Adjust the quantity of the old formula to the lowest number (the amount spent and not returned).
    - Use "Insert Row" to add the new formula.
        - If the quantity of the old formula is reduced, TWIST automatically assigns the amount of the new formula.
    - Click "OK."

7. **Using the row for next month, assign and forecast the new formula for future months.** (See Chapter 3, Lesson 500, *Assigning and Forecasting Food Packages*)**.**

8. **Save.**

9. **Go to the "Family Summary Screen" to issue the benefits.**

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

Formula Replacement

Formula replacement is used when:

- participants have spent all or part of their current month of formula benefits,
- **they do not have cans of formula to return**, and
- WIC policy will allow the replacement of the cans of formula (e.g. domestic violence, police report of stolen formula).

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Woman or Infant/Child ⇨ Food Package Assignment

1. Retrieve the participant for whom you wish to replace formula.

2. Place the row indicator on the current month and click the “FR and FX” button to open the “Formula Exchange/Replacement” pop-up.

3. Select “Formula Replacement.”

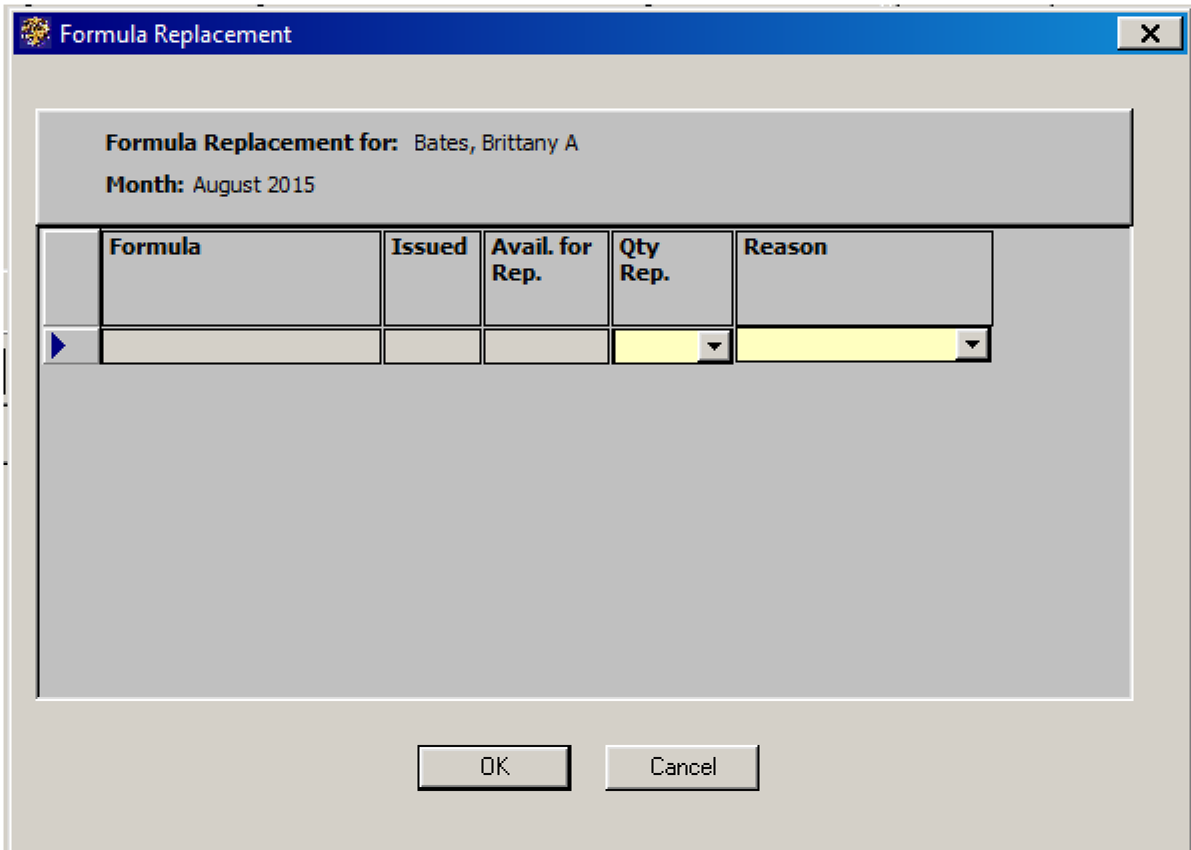

Figure 3: Formula Replacement Pop-Up

4. Enter the quantity of formula the clinic will replace.

5. Select the reason the formula is being replaced and click “OK.”

5. If all the spent formula will be replaced, on the “Food Package Assignment” screen, use the drop down in Module A to assign the new formula.

6. If only some of the spent formula will be replaced, use the “Modify” screen to assign the new formula.

- Click the "Modify" button to open the "Modify" pop-up.
- Adjust the quantity of the old formula to the lowest number (the amount spent and not replaced).
- Use "Insert Row" to add the new formula and adjust the amount if necessary.
    - If the quantity of the old formula is reduced, TWIST automatically assigns the amount of the new formula.
- Click "OK."

8. **Save.**

9. **Go to the "Family Summary Screen" to issue the benefits.**

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

10. Complete Form 57-912 *Replacement of Unavailable/Stolen Formula*, have the cardholder sign it, and send it to the State WIC office within 3 days. See Policy 561 for more information.

✂ *Tips and Shortcuts:*

✍ *Notes:*

Chapter 3: Client Processes
Section 5: Food Packages
Lesson: Formula Warehouse

Objectives:

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

- order formula through the Formula Warehouse.

Oregon Policies:

- 561 Program Integrity: Replacement of Food Benefits
- 760 Medical Formulas and Medical Foods
- 765 Medical Documentation
- 769 Assigning WIC Food Packages, Appendix C

Other Resources:

Staff Training: Food Package Module

Overview:

Some women, infants and children have a documented medical condition that requires the use of medical formula or nutritionals. Some medical formulas are hard to find at local stores so Oregon WIC has a special vendor which can deliver certain medical formulas to families across the state each month. This vendor is called the Formula Warehouse (FW) and its orders are processed by TWIST.

Instruction:

Placing a Formula Warehouse Order

> ☺ **See Job Aid "Medical Formulas and Nutritionals" for which formulas are available from the Formula Warehouse.**

Before using this process, please review

- Chapter 3, Lesson 500, *Assigning and Forecasting Food Packages*
- Chapter 3, Lesson 501, *Modifying Food Packages*
- Chapter 3, Lesson 1100, *Family Summary Screen*

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Woman or Infant/Child ⇨ Family Summary Screen

♬ **NOTE**: The family must have an active eWIC card before ordering from the Formula Warehouse.

1. Click on the "Open" icon and retrieve the woman or child for whom you want to order from the Formula Warehouse.

2. On the Family Summary Screen, verify the medical formula benefits have been issued.

- If the medical formula has not been assigned and issued, return to the Food Package Assignment screen to assign the benefits, and issue the benefits on the Family Summary screen.
- If the client only wants the formula from the Formula Warehouse for one month, only assign the formula on the FPA for one month.

3. Click the "Formula Warehouse" button in the upper right corner of the "Family Summary" screen.

- The "Formula Warehouse" pop-up will open.

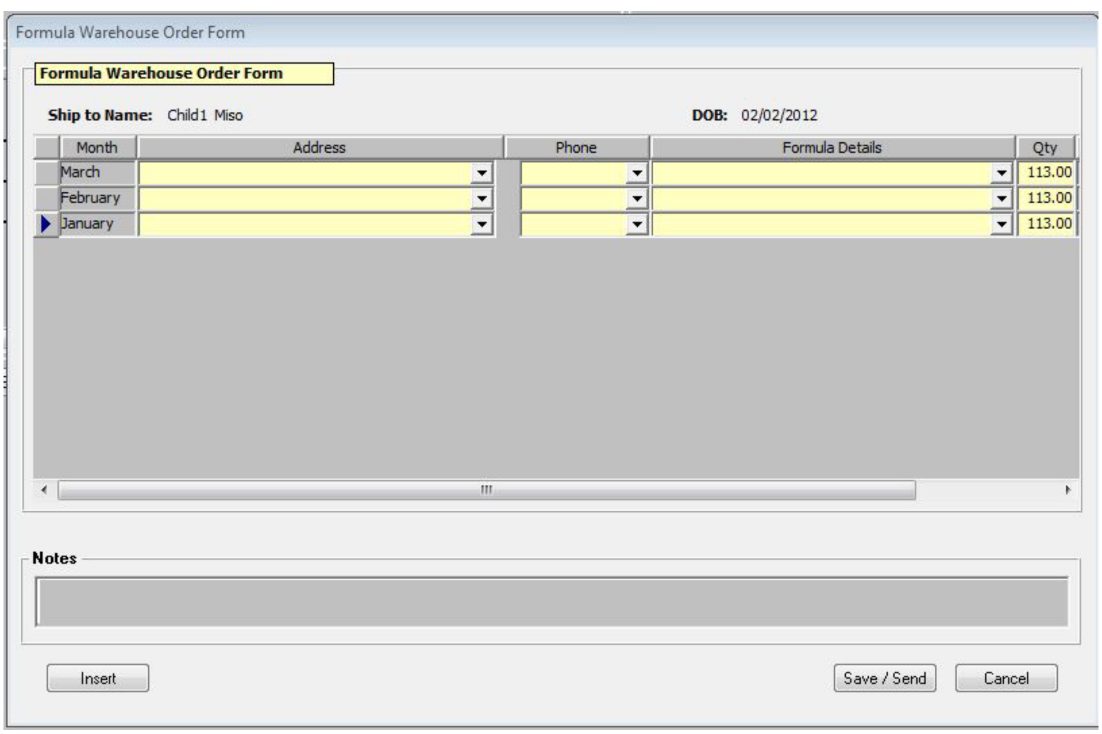

Figure 1: Formula Warehouse Pop-Up

4. **In the "Address" field, use the drop down arrow to select the address where the formula will be shipped for each month.**

   ♬ **NOTE**: The client should select a secure address to receive the formula shipment each month.

   - HOME: Client's home address.
   - CLINIC: If the client cannot receive the formula at their home address, the formula can be mailed to the clinic for the client to pick up.

5. **In the "Phone" field, select the client's preferred phone number.** This number may be used if the shipping company has questions.

6. **In the "Formula" field, use the drop down arrow to select the formula details.**

   - If more than one variety of the formula is available, select the correct variety (for example, different flavors or fiber)
   - To select more than one variety for each month, use the "Insert" button to insert a new row for each month, then enter the correct quantity of each variety.

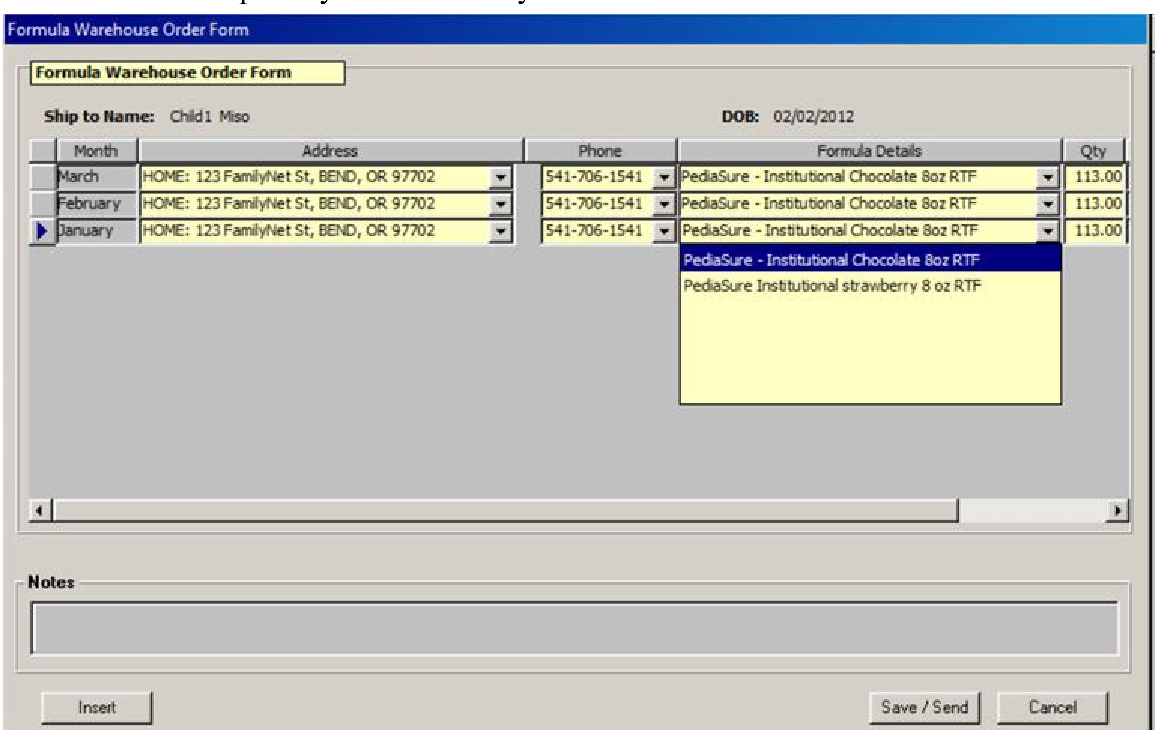

Figure 2: Choosing Formula Variety

7. To enter "Notes" for the Formula Warehouse staff, double click on the "Notes" field.

- These notes are read by the Formula Warehouse staff to help with processing and mailing the order (e.g. "Do not leave package on porch").
- Notes for WIC clinic staff should be entered on the "WIC Notes" screen.

8. Click "Send/Save" to send the order to the Formula Warehouse.

Changing a Formula Warehouse Order - No Formula Returned to the Clinic

♬ **NOTE**: Use Formula Replacement when FW formula has been shipped, but is not available to be exchanged. This must meet the criteria in Policy 561 – stolen, fire, natural disaster, domestic violence, or custody change. See Chapter 3, Lesson 504, Formula Exchange and Formula Replacement. Formula Replacement will automatically generate a new FW order.

Use this process when:

- The type of formula changes (and the current order hasn't shipped yet).
- The amount of formula prescribed increases.
- It is not a Formula Replacement or Formula Exchange.

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Woman or Infant/Child ⇨ Food Package Assignment

1. **Click on the "Open" icon and retrieve the woman or child for whom you want to change the order from the Formula Warehouse.**

2. **On the Food Package Assignment screen, change the formula assignment and enter the medical documentation**.
    - If needed, use the Modify screen to make changes.

3. **Save.**

4. **Click on the "Family Summary Screen" button**.

5. **On the Family Summary screen, click "Issue Benefits."**

6. **Click the "Formula Warehouse" button to open the Formula Warehouse pop-up.**

7. **Enter the new address and formula information (see lesson above for instructions).**
   - If you are adding more formula after formula has shipped for the month, enter the information in the extra blank row.

8. **Click "Send/Save" to send the new order to the Formula Warehouse.**

Changing a Formula Warehouse Order - Formula Warehouse Formula Returned to the Clinic

♬ **NOTE**: Medical formulas cannot be returned to the Formula Warehouse and must be returned to the local agency. If a client brings FW formula back to your clinic, use Formula Exchange to replace it. Formula exchange can be used to replace the same type of formula or to issue a new one.

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Woman or Infant/Child ⇨ Food Package Assignment

9. **Click on the "Open" icon and retrieve the woman or child for whom you want to change the order from the Formula Warehouse.**

10. **On the Food Package Assignment screen, use Formula Exchange (FX) to process the returned formula.**

    See Chapter 3, Lesson 504, *Formula Exchange and Formula Replacement.*

11. **As needed, change the medical formula on the FPA and enter the medical documentation**.
    - The formula can either be new or the same formula.
    - If needed, use the Modify screen to make changes.

12. Save.

13. Click on the "Family Summary Screen" button.

14. On the Family Summary screen, click "Issue Benefits."

15. Click the "Formula Warehouse" button to open the Formula Warehouse pop-up.

16. Enter the new address and formula information (see lesson above for instructions).
- The old formula is displayed on greyed out rows for the current month.
- Enter the new formula warehouse order in the new blank rows.

17. Click "Send/Save" to send the new order to the Formula Warehouse.

When a Formula Warehouse Order Fails

Formula Warehouse orders are sent at the end of every day. At the time TWIST gathers and sends the order, a check is done to see if all the required information is available. There are three reasons why a Formula Warehouse order might fail:
1. There is no active cardholder and card assigned to the account;
2. No formula warehouse eligible benefits have been issued; and,
3. There is inadequate balance on the account to fill the order.

A failure report is produced daily, and the reviewing state staff person will contact the local agency involved. The local agency staff can then resolve whatever issue there is with the order.

The most common reason there is inadequate balance on the account would be because the cardholder purchased some of the formula before the order was submitted at the end of the day. If that is the case, the order can be resubmitted for the remaining balance if needed.

1. **Open the Formula Warehouse screen from the Family Summary Screen.**
2. **Click Save/Send and an error pop-up about inadequate balance will tell you the available balance amount.**
3. **Change the quantity to the available balance.**
4. **Click Save/Send.**

Running the Formula Warehouse Order Report

To run this report:

Food Instruments ⇨ Outputs ⇨ Food Packages ⇨ Participant Formula Warehouse Orders

1. **Enter a date range and click Run.**
   - Clinic can be selected if needed.
2. **Review the information on the report**.
   - Name, WIC ID, and DOB: The name, ID number and date of birth of the participant for which the order was placed.
   - Month: Gives the date the order is being sent to the Formula Warehouse.
   - Order Status: Will indicate either “Waiting” or “Ordered.”
     - Waiting means the order is in the future or failed.
     - Ordered means it has gone to the Formula Warehouse but does not indicate if it has been filled or not.
   - Formula: What has been ordered.
   - Quantity (cans): How much was ordered.
   - Order Created: The staff ID and date of the original order.
   - Special instructions: Indicates if a note was included on the Formula Warehouse order in TWIST.

3. **Click Print if a hard copy is needed.**

✂ *Tips and Shortcuts:*

After a Formula Warehouse order is placed:

- On the *Family Summary* screen, a red exclamation point will display on the “Formula Warehouse” button.
- On the *Food Package Assignment* screen, the status code “FW” is displayed for each month of the order.

✍ *Notes:*

♬ **NOTE**: Changes to Formula Warehouse orders can be made at any time, but making changes before the order is shipped saves the program time and money.

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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**."

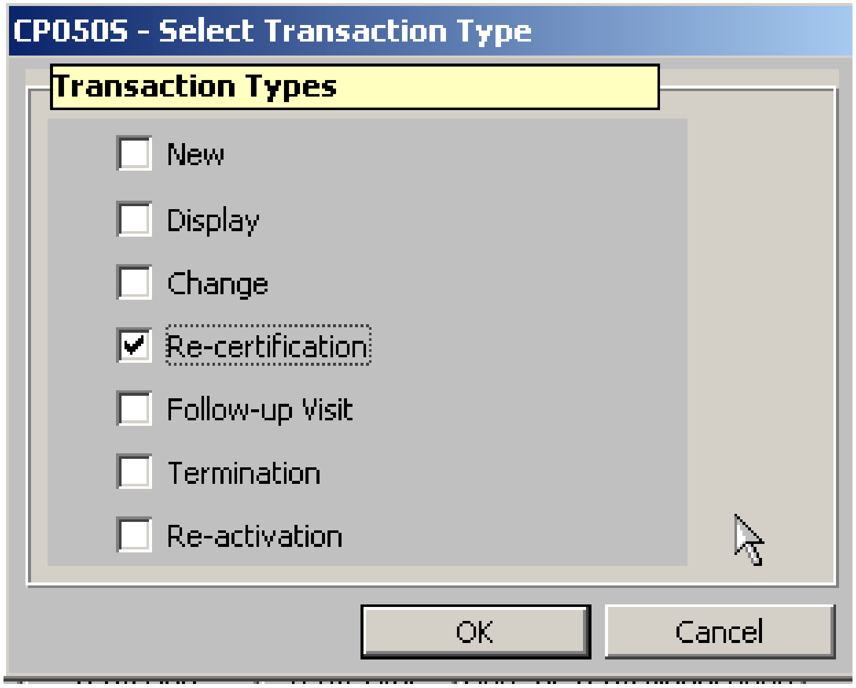

Figure 1: "Select Transaction Type" Pop-Up

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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Chapter 3: Client Processes
Section 6: Certification Variables
Lesson: Breastfeeding Tracking

Objectives:

Upon completion of this lesson the user will be able to:
- utilize the "**BF Tracking**" screens;
- document breast pump issuance; and
- update breast pump issuance record;
- record a breastfeeding contact.

Oregon Policies:

710 Breastfeeding: Definition, Promotion and Support Standards
712 Breastfeeding: Breast Pump Ordering, Distribution and Tracking Guidelines
716 Breastfeeding Peer Counseling (BFPC) Program Requirements

Overview:

TWIST has a special set of screens used to collect information on the breastfeeding mother and infant. The "**Breastfeeding Tracking**" screens found on the woman's certification screen will assist in educating and supporting pregnant and breastfeeding women and are used to track breast pump issuance and to record contacts specific to breastfeeding.

Instruction:

Completing the Questionnaire

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Women ⇨ Breastfeeding Tracking

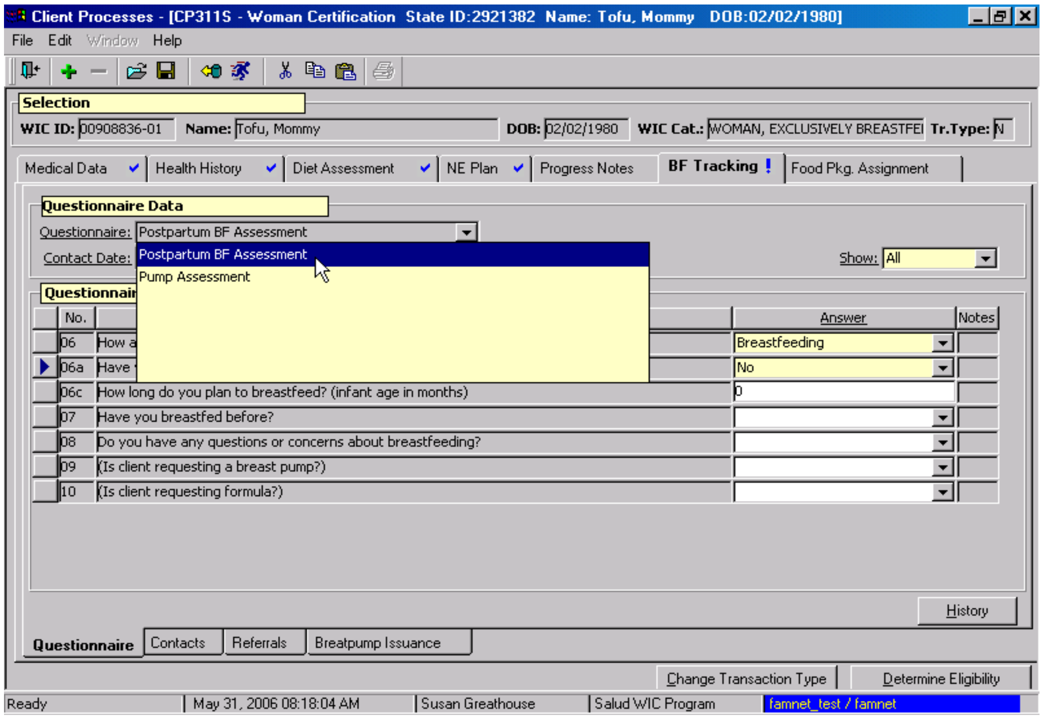

Figure 1: "BF Tracking – Questionnaire" Screen

1. **Retrieve the client for whom you want to enter breastfeeding tracking information.**

2. **From the "Questionnaire" field select the appropriate questionnaire from the drop down list.**

3. **Tab to the "Contact Date" field.**

   - This field defaults to today's date but may be modified.
   - The **"Entered By"** field defaults to the user's login ID.

4. **Tab to the "Show" field.**

   - From this drop down menu you may select to display **"All"** questions or only **"mandatory"** questions.
   - The questions will be displayed in the **"Questionnaire"** section of the screen.

5. **Enter the appropriate answer for each question.**

   - Answers are entered by selecting from the drop down list or manually entering specific information such as a date.
   - Certain answers may generate additional questions or pop-ups.

- Click in the question field and scroll over to view the entire question.
- Clicking **"OK"** will save the answers and close the pop-up.
- Clicking **"Cancel"** will close the pop-up.

♫ NOTE: Information can be changed the day the contact visit is entered by accessing the screen and modifying the answer.

6. **Double click in the "Notes" field.**

   - This opens the **"Question Notes"** pop-up and allows you to enter a free form note, as needed.
   - A note may be entered for each answer.

7. **Click "OK" to save the note and close the pop-up.**

   - Clicking **"Cancel"** will close the pop-up without saving the note.

8. **Save.**

Accessing Questionnaire History

Previous "Breastfeeding Tracking" questionnaires can be viewed at any time utilizing the "**History**" button.

The starting point for this lesson is:
Client Processes ⇨ Certification ⇨ Women ⇨ Breastfeeding Tracking ⇨ Questionnaire

1. **Retrieve the client for whom you want to view breastfeeding information.**

2. **On the "Questionnaire" screen, click the "History" button.**
   The "**Questionnaire History**" pop-up is displayed.

3. **Select the questionnaire you want to view and click "OK."**

   - The questionnaire is displayed.
   - The questionnaire is view only and cannot be modified unless it was created today.
   - To close the pop-up without selecting a questionnaire, click **"Cancel."**
   - To view another questionnaire, click the **"History"** button and repeat the process.

4. **Exit.**

Completing the "Contacts" Screen

This sub-tab is used to record contacts with participants that are specific to breastfeeding and to create a call back tickler if desired.

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Women ⇨ Breastfeeding Tracking ⇨Contacts

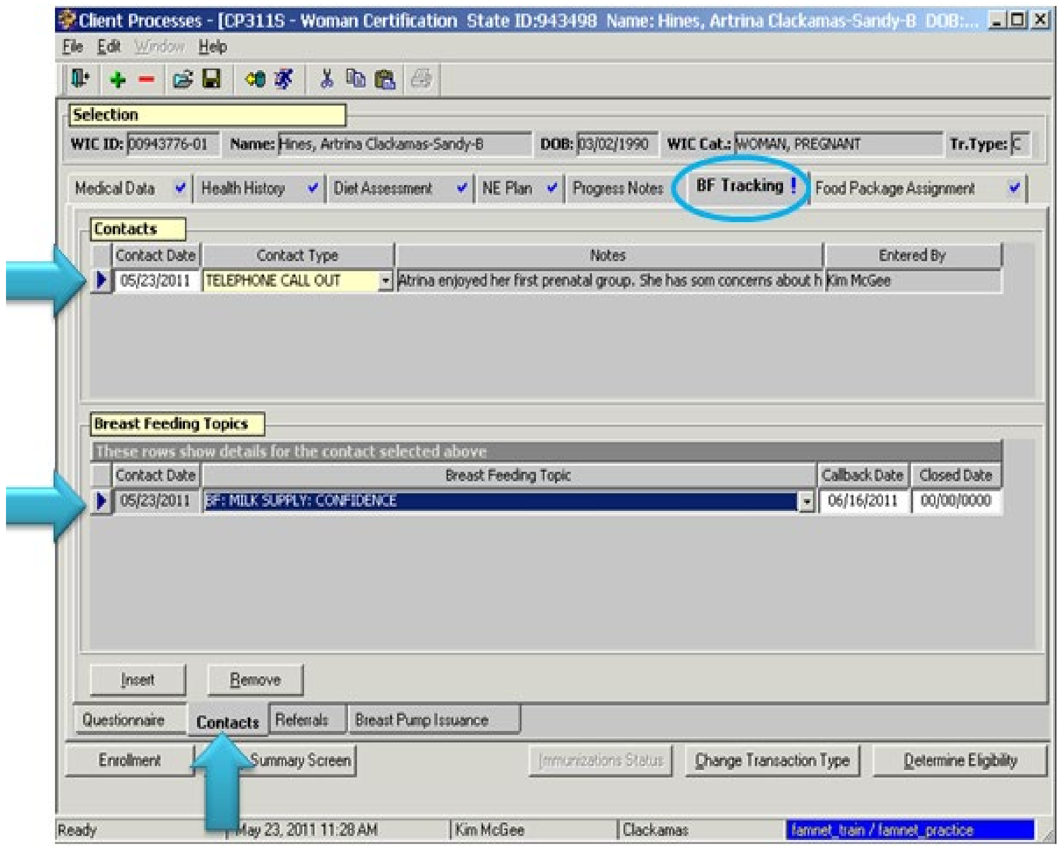

Figure 2: "BF Tracking – Contacts" Screen

1. **Click on the "Contacts" tab.**

   The **"Contact Date"** and the **"Entered By"** fields default to today's date and the person entering the contact, but can be modified.

2. **Select the type of contact from the drop down list in the "Contact Type" field.**

3. **Double click on the "Notes" field to write a note. This field is optional.**

4. **To enter a breastfeeding topic for the "contact", click the "Insert" button in the lower left corner to generate a blank row in the "Breastfeeding Topics" section.**

5. **Complete the "Breastfeeding Topic" field by selecting the appropriate topic from the drop down list. The breastfeeding topic documents what was discussed at the contact it is associated with.**

♫ NOTE: The **"Callback Date"** and **"Closed Date"** are optional fields. A breastfeeding topic must be entered in order to enter a call back date. If a callback date has been entered the client will show on the **"Breastfeeding Tracking Function Call Back"** report if the date entered is within the report parameters. If the closed date is completed the participant will no longer show on the **"Breastfeeding Tracking Function Call Back"** report.

6. **To display the "Breastfeeding Topic" history, click on the "Contact Date". Breastfeeding topics for that date will show in "Breastfeeding Topics" section.**

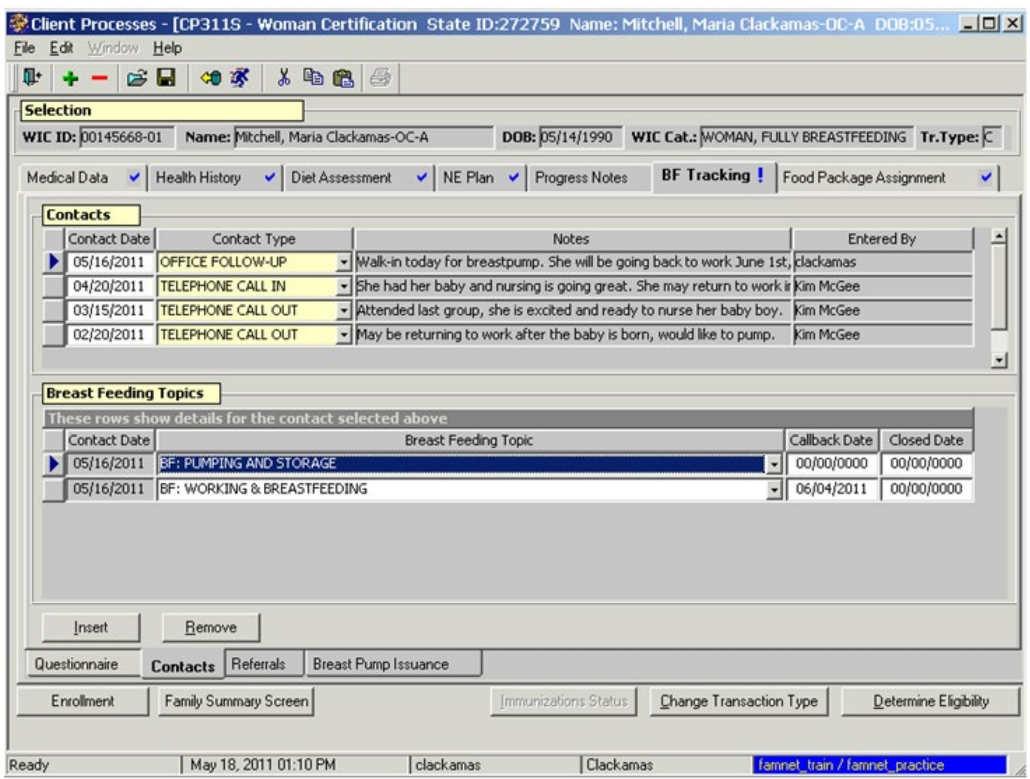

Figure 3: "Breastfeeding Topics"

Completing the "Referrals" Screen

The starting point for this lesson is:
Client Processes ⇨ Certification ⇨ Women ⇨ Breastfeeding Tracking

1. **Click on the "Referrals" tab.**

   The "**Contact Date**" field defaults to today's date but can be modified.

2. **Tab to the "Organization" field and select the appropriate organization from the drop down list.**

   The "**Phone Number**" will be displayed.

3. **Select the appropriate status from the drop down list.**

   - The **"Date Ended"** will be generated by the system if the **"Status**" is marked **"Completed."**
   - For all other status selections the **"Date Ended**" will be disabled and displayed as **00/00/0000**.

4. **Click the "Insert" icon to add a second row.**

5. **Click the "More Info." button in the lower right corner.**

   - The **"Referrals from WIC"** pop-up is displayed with detail information about the organization.
   - To print the information for the client, click **"Print."**
   - To close the pop-up, click **"Close."**

6. **Save.**

Breast Pump Issuance

This sub-tab is used to record what type of breast pump has been given to a woman and tracks the return of multi-user pumps. Breast pumps must be entered into inventory before they are available on these screens for issuance. For more information see Chapter 8, Lesson 104 *Breast Pump Inventory and Tracking Reports*.

The screen consists of two sections, "**Contact Info**" and the issuance record.

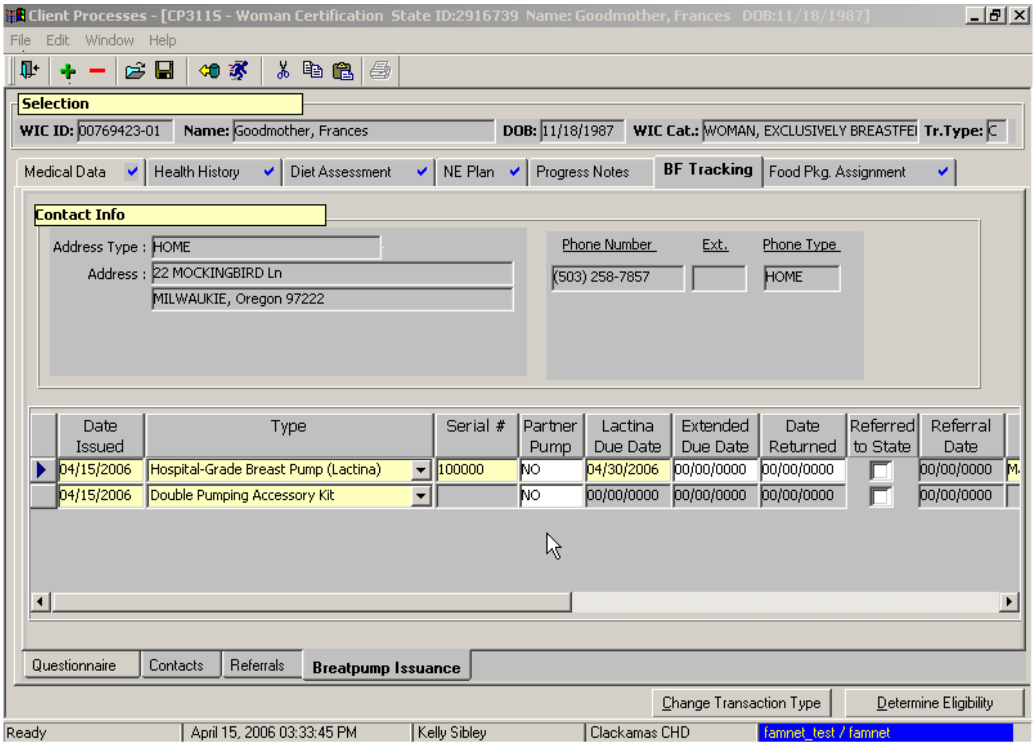

Figure 4: "Breast Pump Issuance" Screen

Contact Info will be auto-filled from Client Master with the address type, address, and phone number, and phone number type.

Issuing a Lactina or EnDeare

Figure 5: Lactina or EnDeare Issuance

1. **The "Date Issued" field defaults to today's date but can be modified.**

2. **Select "Hospital-Grade Breast Pump (Lactina)" or "Multi-User Breast Pump (Hygeia EnDeare)" from the drop down list in the "Type" field.**

3. **Enter the "Serial #" shown on the pump. Include the H with the Hygeia serial #.**

4. **Enter the date the pump is due to be returned by the client in the "Pump Due Date" field. This field can be modified at any time. If this date is within the date parameters on the "Multi-**

User Pump Tracking" report, the participant will show on that report.

♫ NOTE: The "**Extended Due Date**" field is optional. Using this field allows the user to retain the original "**Pump Due Date**" information.

Alternate Contact	Alternate Contact Relationship	Alternate Contact Phone	Notes
Mary Goodfriend	Friend	503-254-9454	

Figure 6: Alternate Contact Information

5. **Complete the "Alternate Contact" field with the alternate contact's first and last name.**

6. **Complete the "Alternate Contact Relationship" field with the relationship of the alternate contact to the WIC client.**

7. **Complete the "Alternate Contact Phone" field with the phone number of the alternate contact.**

8. **Double click in the "Notes" field to open the "Breast Pump Issuance Notes" field and enter a free form note. This field is optional.**

9. **Once "Save" is performed the "Partner Pump" field will display "Yes" if the pump belongs to a WIC Breast Pump Partner or "No" if the pump belongs to your agency.**

Issuing Other Breast Pumps

Date Issued	Type	Serial #	Partner Pump	Lactina Due Date
04/15/2006	Hospital-Grade Breast Pump (Lactina)	100000	NO	04/30/2006
04/15/2006	Double Pumping Accessory Kit		NO	00/00/0000

Figure 7: Pump Issuance

1. **The "Date Issued" field defaults to today's date but can be modified.**

2. **Select the desired pump or pump accessory from the drop down list in the "Type" field.**

♫ NOTE: Issuance of a Lactina, EnDeare or Pump-In-Style will be indicated on the **"Family Summary Screen"**. See Chapter 3, Lesson 1100 *Family Summary Screen* for more information.

♫ NOTE: To add an additional row, click the **“Insert”** icon. To remove a row, click the **“Remove”** icon. Once **“Save”** is performed the row cannot be removed.

Entering a Return Date for a Lactina or EnDeare Pump

1. **Complete the “Date Returned” field when the pump is returned. Entering a date in this field will remove the “Pump Due Date” reminder box in the “Family Summary Screen” and will remove the participant from the “Multi-User Pump Tracking” report.**

Referring an Overdue Lactina or EnDeare to the State

1. **Click in the “Referred to State” field to place a check mark in the box.** Refer to Policy 712 in the WIC Program and Policy Manual for more information on referring a client with an overdue pump to the State WIC office.

2. **Type in the date the overdue breast pump was referred to the State WIC office in the “Referral Date” field.** This field becomes mandatory when the “Referred to State” field is completed.

➥ *Practice Activities:*

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Women ⇨ Breastfeeding Tracking ⇨ Questionnaire

1. Click the “Open” icon to access “Client Search” and select a client for whom you want to enter Breastfeeding Tracking information.
2. Click the “Return with Client” button.
3. Select the appropriate questionnaire.
4. Leave “Contact Date” as today’s date.
5. Tab to the “Show” field and select All.
6. Complete all answers to the questions using any information you want.
7. Save your work.
8. Click the “Contacts” tab and add a contact with today’s date.
9. Select “Home Visit” as the contact type.
10. Enter a note.
11. Add a breastfeeding topic of your choice with today’s date.
12. Leave the “Callback Date” and “Resolved Date” blank.
13. Click the “Referrals” tab and add a referral with today’s date.
14. Select an organization of your choice and select “Completed” for the status.
15. Save your work and exit the screen.

✍ Notes:

Chapter 3: Client Processes
Section 6: Certification Variables
Lesson: Temporary Newborn Infant Certification

NOTE: Temporary Newborn should not be used at this time. Please call App Support if you have questions.

Objectives:

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

- complete a Temporary Newborn Certification of one or more infants;
- change the mother's category and issue a new food package;
- describe the policies concerning the issuance of benefits for the newborn who is not present at time of the certification completion; and
- complete a certification with a participant with multiple infants.

Oregon Policies:

- ♦ 601 Physical Presence
- ♦ 645 Certification Periods
- ♦ 713 Breastfeeding: Use of Supplemental Formula

Overview:

Having a baby can be a very busy and stressful time. TWIST helps you eliminate some of the stress for the participant by allowing a "Temporary Newborn Certification" to be completed. This certification is a quick process where minimal information is collected from the participant and entered into the system. TWIST then creates a limited certification period of six weeks from the infant's date of birth rounded to the end of the month. This allows you to issue benefits 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 benefits can be issued to the participant's account. After the Temporary Newborn Certification period has expired you must enter all the necessary data into TWIST to complete a certification.

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

♬ NOTE: The Temporary Newborn Certification process should not be used if you plan to see the infant in the month of their birth. TWIST will not allow you to certify an infant that has been enrolled using the Temporary Newborn Certification process until the month they turn 6 weeks old.

Instruction:

Enrolling a Temporary Newborn

NOTE: Temporary Newborn should not be used at this time. Please call App Support if you have questions.

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."**

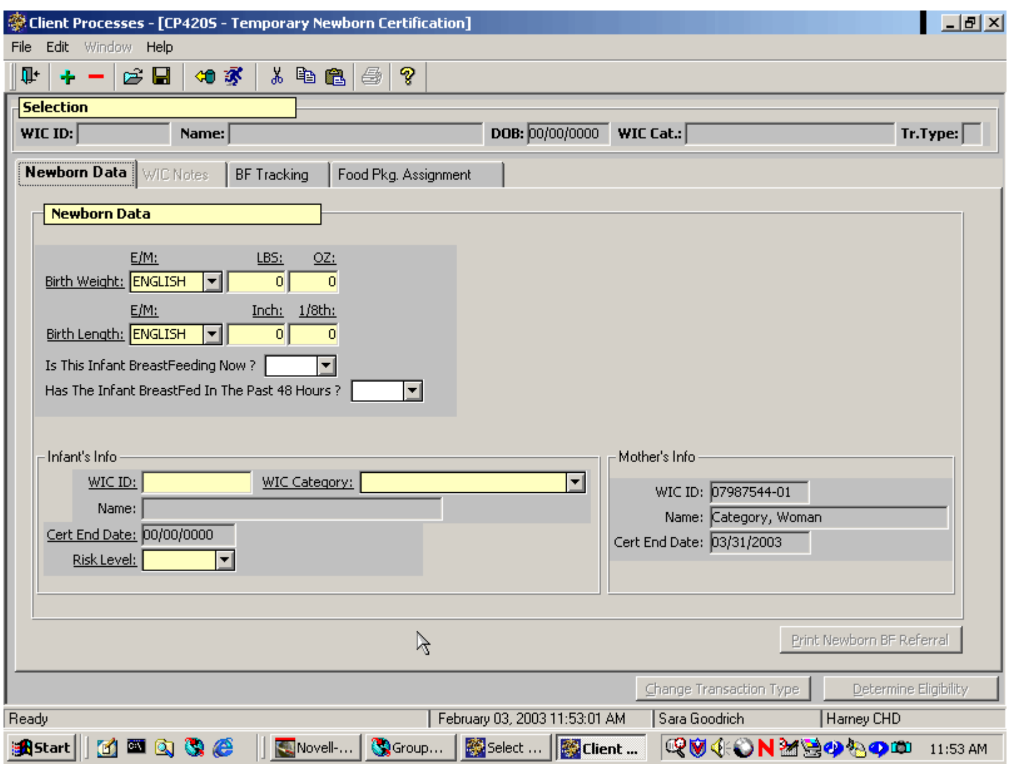

Figure 1: "Temporary Newborn Certification – Newborn Data" Screen

- The "**Selection**" section contains the participant 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 participant 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.

NOTE: You CANNOT perform a Temporary Newborn Certification on an infant that has already been prescreened for WIC. Infants that have been prescreened must be enrolled using the normal procedure with all certification screens completed.

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 "Newborn, Non-breastfeeding," 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.

♬ NOTE: TWIST will not allow you to select **Mostly** or **Some** Breastfeeding as the category for a newborn in the month of their birth. WIC does not allow issuance of formula to a breastfeeding infant under one month of age.

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 twins or more, continue to search for and enter the information for each infant before you exit.

13. **Exit**.

You will return to the mother's screen with her new postpartum category and ADD displayed.

14. **On the mother's record, Fast Path to Women, Certification and go to the "Food Package Assignment" tab.**

The standard food package for her new category is displayed. Adjust her food package, if needed.

See Chapter 3, Lesson 500, *Assigning and Forecasting Food Packages* for more information.

16. **Save.**

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*.

Completing a Temporary Newborn Certification

NOTE: Use the instructions sent on January 15, 2016 for special instructions on Temp Newborn certification.

After a temporary newborn has been enrolled, the infant's record should be accessed through the regular enrollment or certification screens, not the "**Temporary Newborn Certification**" screen. When an infant is enrolled using the temporary newborn process, only the "**Medical Data**" and "**Food Package Assignment**" tabs will have check marks. The remaining tabs will receive check marks once the certification is completed at their first appointment.

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”
  - “Family Summary Screen”
- 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 ⇨ Enrollment

1. Retrieve the participant 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 ⅜ 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.

✍ Note

Chapter 3: Client Processes
Section 6: Certification Variables
Lesson: Certification Data Entry Document

Objectives:

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

- state the appropriate use of the paper certification form.

Oregon Policies:

- ♦ 405 TWIST Disaster Management
- ♦ 641 Documentation Requirements in the Absence of TWIST

Overview:

There are a few normal circumstances when you will certify a client without access to TWIST as home visits or satellite clinics without computer equipment. There may also be instances when you are not able to access TWIST in your regular clinic, yet WIC operations can otherwise continue. When these situations arise, certification data can be collected on a Certification Data Entry Document and then entered into TWIST when it is accessible. To fully collect all mandatory data for a certification, the Certification Data Entry Document must be accompanied by completed health history and diet assessment questionnaires.

In this lesson you will learn how to complete a Certification Entry Document and when it should be used.

Instruction:

Completing the Certification Data Entry Document

In TWIST, a certification cannot be completed and benefits cannot be issues until information has been entered into all mandatory fields. Appointments cannot be scheduled for a client until the certification is complete. The information collected on the Certification Data Entry Document will be used to complete mandatory fields in TWIST. The form is two sided and needs to be signed and dated when complete.

The following sections comprise the Certification Data Entry Document.

- Client Primary
- Transaction Type
- Income Eligibility

- WIC Intake
- Medical Data - Woman, Infant & Child
- Other Medical Data
- NE Plan
- Appointments
- Food Package

There are many optional fields in TWIST that are not included on the form. If you need to document additional information use the health history questionnaire or the margin of the certification data entry document.

☺ See Job Aid "Certification Data Entry Document" for more information.

When to Use the Certification Data Entry Document

Most of the time, data will be entered directly into TWIST. The Certification Data Entry Document is not intended to be used on a regular basis to collect certification information and then enter it later into TWIST. It is to be used when TWIST is unavailable. Information from the Certification Data Entry Document needs to be entered into TWIST within two working days.

The following are appropriate situations for using the Certification Data Entry Document.

- Field nurses who conduct home visits may use the Certification Data Entry Document with the understanding that data collected on the form must be entered into the TWIST system within two business days.
- Satellite sites that do not have a laptop or other method for conducting a certification using TWIST will use the Certification Data Entry Document.
- Local agencies must use the Certification Data Entry Document in the event that certification with TWIST is not available due to a disaster or equipment failure.

Example: An agency network system is shut down for three hours due to a brown out. During this period, certifications would be completed using a Certification Data Entry Document. Once the brown out is resolved, certifications would continue utilizing TWIST. The information from the certifications completed during the three hour brown out would need to be entered into TWIST within two business days as per policy.

➥ *Practice Activities:*

Take the next 5 minutes to talk about your Local agency and when it would be appropriate to use the Certification Data Entry Document and when it would not. Use the notes section to write down your responses.

✍ *Notes:*

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Chapter 3: Client Processes
Section 8: Other Client Processes
Lesson: Transaction Types

Objectives:

Upon completion of this lesson the user will be able to:
- select the appropriate transaction type for each client process.

Oregon Policies:

♦ 945 Computer Generated Transactions

Overview:

In order to make TWIST easier to use, you will use the same screens for many different functions. For example, the "**WIC Intake**" screen can be used during "Prescreening," "New Enrollment," "Recertification," "Transfers" and more! The Transaction Type code is displayed on the top right corner of each screen and it helps you to know which function you are using while you are on the screen.

In this lesson, you will learn about transaction types, including when and how to select the correct one

Instruction:

About Transaction Types

Within "Client Processes," transaction types are used to indicate which type of transaction, or process, you are using in TWIST. The transaction types are:

- A – Re-activate
- C – Change
- D – Display
- I – Transfer-In Within Oregon
- N – New Enrollment
- O – Transfer-In Outside Oregon
- P – Pre-screen
- R – Recertification
- T – Terminate
- X – Re-instate

☺ See Job Aid "Transaction Types" for more information about each Transaction Type.

Changing Transaction Type

In some cases, the transaction type is displayed automatically based on the TWIST function you are using. For example, when using Transfers, Prescreening, Enrollment, or making changes to a record mid-certification.

Other times, you will need to select the transaction type to reflect the client process you wish to use. The following are some examples of when you would need to select the transaction type.

- To re-activate a terminated client (who is still within their certification period), select "Re-activation."
- To recertify a client, select "Re-certification."
- To re-instate a client who is terminated and more than 30 days past their certification end date, select "Re-instate."

To select the Transaction Type, follow this process in TWIST.

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

1. **Retrieve the client for whom you wish to change transaction type.**

2. **Click the "Change Transaction Type" button (at the bottom of the window) to open the "Select Transaction Type" pop-up.**

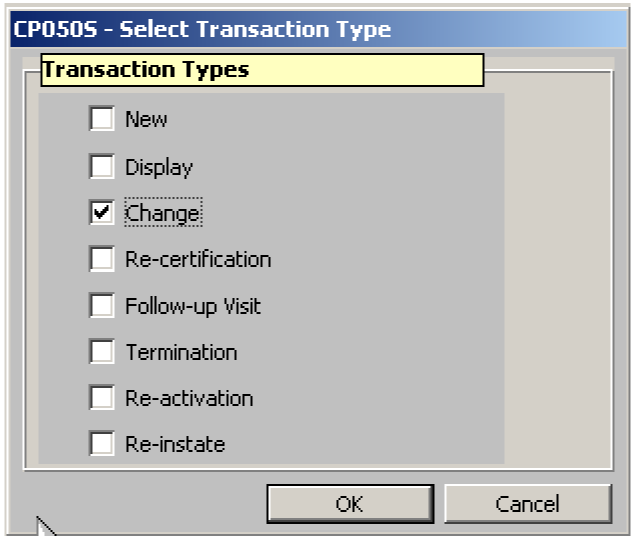


Figure 1: "Select Transaction Type" Pop-Up

3. **Click the check box next to appropriate the transaction type.**

4. **Click "OK" to save the transaction type selection and close the pop-up.**

For help deciding which transaction type to select, use the following resources.

☺ See Job Aid "Choosing the Correct Transaction Type for a Returning Woman with a New Pregnancy"

☺ See Job Aid "Choosing the Correct Transaction Type for Children due for Recertification"

☺ **See the *Video* Job Aids:**

***Video*: "Which Transaction Type for a Returning Woman with a New Pregnancy"**
https://youtu.be/qeNnCy4iZao

***Video*: "Which Transaction Type to Use to Recertify a Terminated Child"**

https://youtu.be/HhXiUnIGZCM

✍ ***Notes:***

Chapter 3: Client Processes
Section 8: Other Client Processes
Lesson: Re-activate and Re-instate

Objectives:

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

- demonstrate how to re-activate a client; and
- demonstrate how to re-instate a client.

Overview:

A client may be terminated automatically by TWIST or manually by the user during a certification period for a variety of reasons. Occasionally these terminated clients may return to WIC during their certification period and need to be re-activated. TWIST allows you to re-activate any terminated client whose certification end date is later than the current date. This function allows you to resume benefits immediately for the client without recertifying. This will save both you and the client time.

Any client that is terminated and more than 30 days past the most recent certification end date will need to be reinstated before they can be recertified. The reinstate transaction should also be used for a woman who may or may not be in a current certification period and comes in to be certified for a new pregnancy.

In this lesson you will learn how to reactivate and reinstate clients through the "**Change Transaction Type**" pop-up.

☺ See Job Aid "Choosing the Appropriate Transaction Type" for more information.

Instruction:

Re-activating a Client

The starting point for this section is:

Client Processes ⇨ Enrollment & Intake ⇨ Enrollment

1. **Retrieve the client for whom you want to re-activate.**

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

3. **Verify the client is eligible to be re-activated by reviewing the "Termination/Ineligible Reasons" pop-up.**

4. **Verify the client's transaction type is marked "D" for display.**

5. **Verify the certification end date is a future date.**

6. **Select the appropriate "Certification Record."**

7. **Click the "Change Transaction Type" button in the lower right hand corner.**

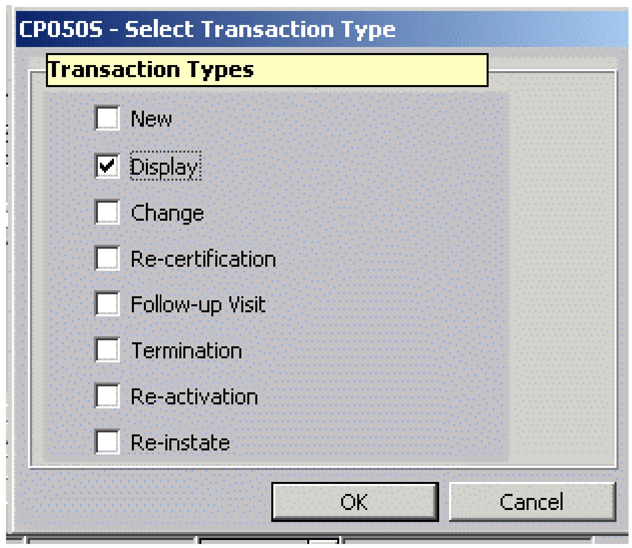


Figure 1: "Select Transaction Type" Pop-Up

8. **Check the "Re-activation" check box.**

9. **Click "OK" to save the change and close the pop-up.**

   9.1 The "**Transaction Type**" is changed to "**A**" for re-activated.

   9.2 The "**Re-Activate?"** box is checked.

   9.3 The "**Term Date**" and the "**Date of Term Notification**" have been reset to "**00/00/0000**."

10. **Save.**

11. **Exit back to "Select Modules."**

Re-instating a Client

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

1. **Retrieve the client for whom you want to re-instate.**

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

3. **Verify the reinstate transaction type is appropriate for the client's situation.**

4. **Select the appropriate "Certification Record."**

5. **Click the "Change Transaction Type" button in the lower right hand corner.**

6. **Check the "Re-instate" check box.**

7. **Click "OK" to save the change and close the pop-up.**

   7.1 The "**Transaction Type**" is changed to "**X**" for re-instate.

   7.2 The "**WIC Category**" field becomes blank.

8. **Select the client's category from the drop down list.**

   The certification start date will auto fill with the current date.

9. **Enter the "LMP," "EDD" or "ADD" date as appropriate.**

   The certification end date will auto fill based on the client's category and "**LMP**," "**EDD**" or "**ADD**" as appropriate.

10. **Proceed with the steps for recertifying the client as in the "Recertification" lesson.**

    The system will change the "**Transaction Type**" to "**R**" for re-certification when you access the "**Medical Data**" screen.

✂ *Tips and Shortcuts:*

- From this window you may fast path to:
  - "Client Master Demographics"
  - "Enrollment"
  - "Family Appointments"
  - "Infant/Child Certification"
  - "Woman Certification"
- A client can only be re-activated or reinstated from the "Change Transaction Type" pop-up in the "Enrollment & Intake" section.

- For clients who are terminated and more than 30 days past their certification end date, use the “Re-instate” transaction type.
- When the user selects “Re-instate” or “Re-certification” for an inactive client still within a current certification period, a message will pop-up stating, “The client is still in a valid certification period, consider using the Re-activate Transaction Type.”
- When the user extends the LMP or EDD for a pregnant woman more than 30 days before changing the transaction type, a message will pop-up stating, “You are moving the LMP/EDD more than 30 days. If this is for current pregnancy in TWIST, select YES. If this is a NEW PREGNANCY, select NO, than use the Reinstate transaction and enter the new EDD. Do you still want to proceed?”

➥ *Practice Activity #1:*

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

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

1. Retrieve the client you wish to re-activate.
2. Verify the client is eligible to be re-activated.
3. Click on “WIC Intake.”
4. Verify transaction type is “D.”
5. Verify certification end date is a future date.
6. Click the “Change Transaction Type” button.
7. Check the “Re-activation” box.
8. Click “OK” to close the pop-up.
9. Verify the transaction type is now “A,” the “Re-Activate?” box is checked and the “Term Date” and “Date of Term Notification” are set to 00/00/0000.
10. Exit the screen.

✓ *Skill Check:*

Now that you have completed this lesson take the appropriate steps to re-instate a client. Use the information from your ☛ Activity Sheet for this skill check.

Do a screen print of the “WIC Intake” screen before you re-instate and after you re-instate. Write your name on both screen prints before you turn them in to your instructor.

✍ *Notes:*

Chapter 3: Client Processes
Section 8: Other Client Processes
Lesson 803: Updating Client Information Mid-Certification

Objectives:

Upon completion of this lesson the user will be able to:
- summarize how risks are affected by a Change transaction; and
- update information during mid-certification.

Oregon Policies:

♦ 646 Mid-Certification Health Assessment

Overview:

During the certification period, you may need or want to update information in a client's record. This could occur during a Mid Cert Health Assessment or Individual Follow-up appointment. TWIST allows you to update all client information any time during the certification period. Updating information may result in additional risk(s) being assigned. You may also manually add additional risk(s) during the certification period. However, any change in the client's data **will not** result in risks being removed. In addition, changes made to the client's income will not automatically terminate them in the system. Client's whose income exceeds income requirements mid-certification will need to be manually terminated. Refer to Chapter 3, Lesson 805, *Terminations/Ineligible* for how to manually terminate a client from WIC.

Once a client certification has been completed the transaction type automatically changes to "C." Information may be changed at any time. You do not need to access the "Change Transaction Type" pop-up.

To change a client's food package mid-certification, see Chapter 3, Lesson 502, *Changing Food Package Mid-Certification*.

To change a client's category mid-certification, see Chapter 3, Lesson 806, *Category Change*.

In this lesson you will learn how to update client certification information.

Instruction:

Changing Client Information

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

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

1. **Retrieve the client for whom you want to update information.**

2. **Click the tab title of the screen you want to update.**

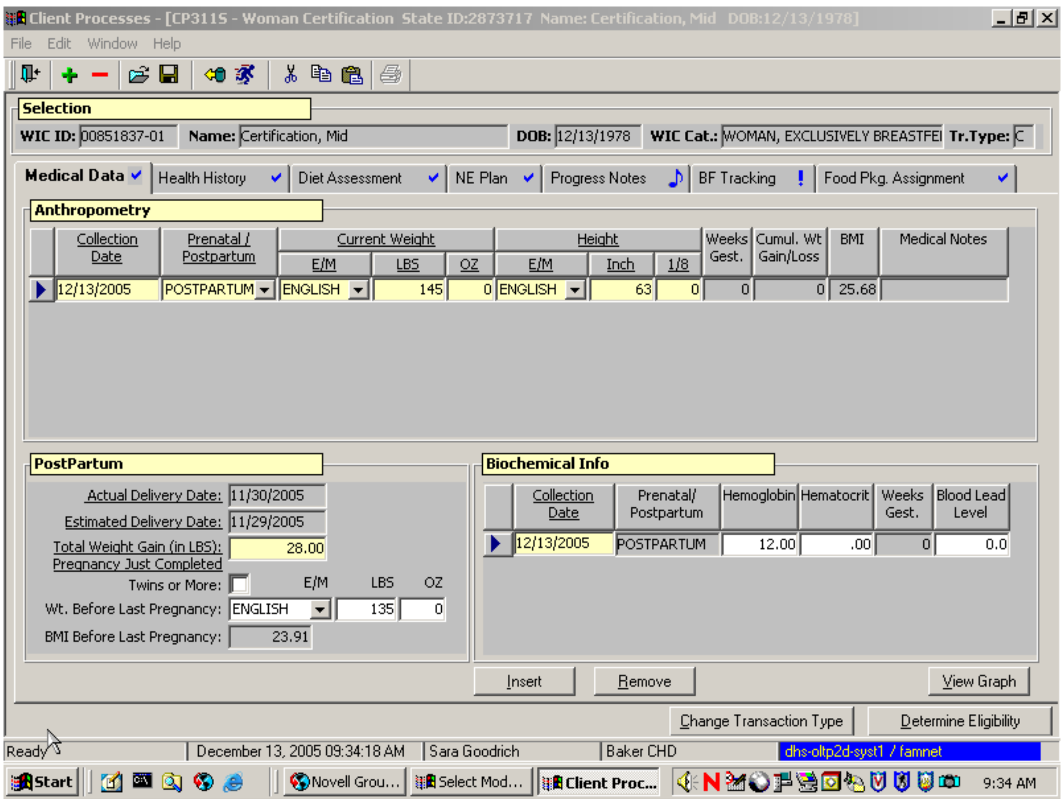


Figure 1: "Woman Certification" Window

3. **Use the "Insert" icon or button to add a new row of data.**

4. **Enter the new information.**

5. **Click "Health History – Risk Factors" to review medical or health risks.**

6. **To assign an additional risk double click on the risk you want to assign.**

♫ NOTE: Your role in the clinic determines which screens you may update.

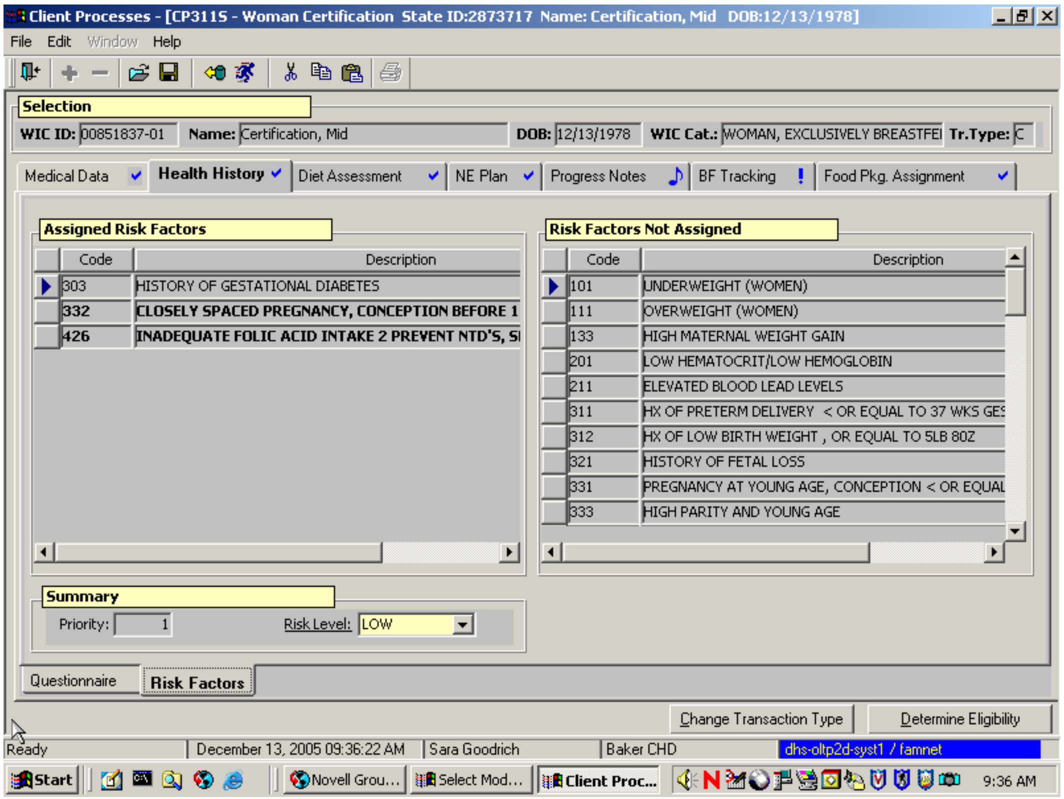


Figure 2: "Health History – Risk Factors" Screen

7. **Save.**

8. **Exit back to "Select Modules."**

✂ *Tips and Shortcuts:*

✍ Notes

Chapter 3: Client Processes
Section 8: Other Client Processes
Lesson 804: Transfers

Objectives:

Upon completion of this lesson the user will be able to:
- Transfer a participant or family from one local agency to another within Oregon;
- Transfer a participant from another state into Oregon WIC; and
- Print a WIC transfer card (VOC).

Oregon Policies:

- ♦ 652 WIC Transfer Card and WIC Overseas Program
- ♦ 653 Participant Transfers Into And Out-Of-State
- ♦ 654 Participant Transfers Within State
- ♦ 610 Required Proofs - Identity, Residency, Income

Overview:

TWIST makes transferring a participant as easy as 1-2-3. In TWIST you can transfer participants from one local agency to another in just a few minutes and enrolling a participant from another state is almost as fast. You will even be able to print transfer information for participants leaving Oregon with a few quick clicks!

Instruction:

Transferring a Participant from Outside Oregon

The starting point for this section is:

Client Processes ⇨ Transfers

To complete an out-of-state transfer, minimum information must be entered into TWIST. This information should be available on the Verification of Certification (VOC) or Transfer card the participant will bring with them. If not, call the participant's originating WIC clinic to get the information you need.

1. Select "Transfer-In From Outside Oregon."

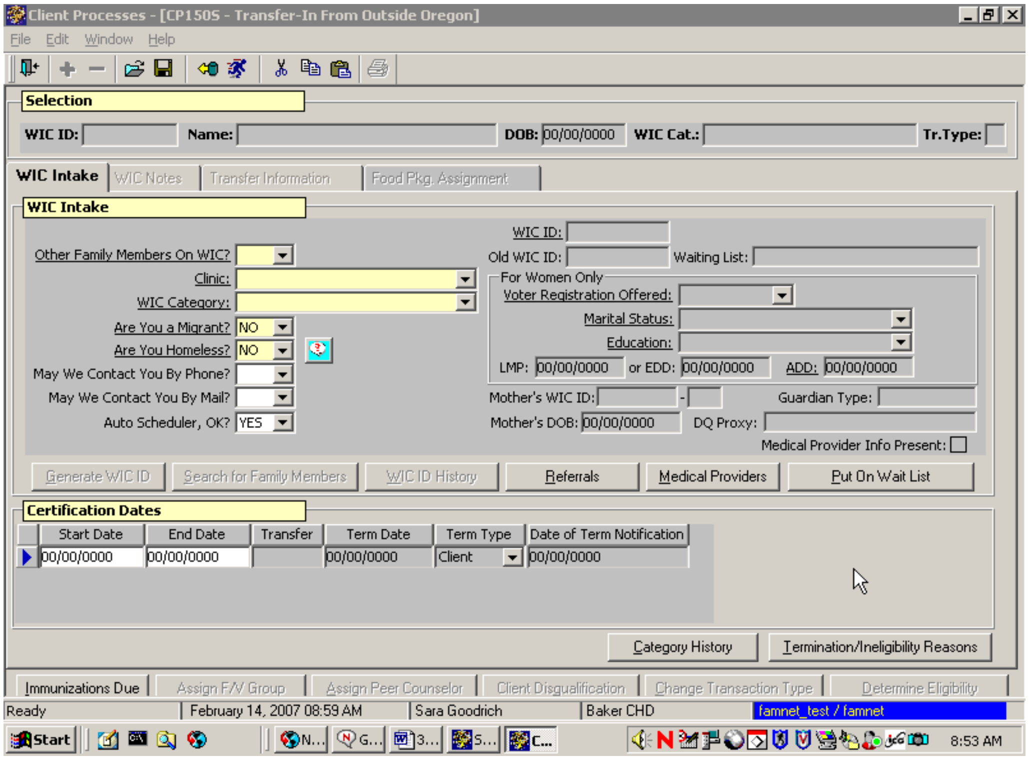


Figure 1: "Transfer-In From Outside Oregon" Pop-Up

- The window is divided into the "**Selection**" section, which contains the participant's information, and the tab section.
- The window contains four tabs: "**WIC Intake**," "**WIC Notes**," "**Transfer Information**" and "**Food Pkg. Assignment**."
- The "**WIC Intake**", "**Transfer Information**" and the "**Food Pkg. Assignment**" screens must be completed to successfully transfer the participant into WIC.
- Tabs will be marked with a check mark when completed.

2. Search for the participant you want to transfer into Oregon WIC.

♫ NOTE: Remember, you must search for a participant before they can be added to the database.

2.1 Click the "**Add New Client**" button if the participant is not in the FamilyNet database.

- This takes you to the "**Client Primary**" screen.
- Refer to Chapter 2, Lesson 100 *Client Search and Demographics* to enter client primary information.

2.2 If the participant is already in the FamilyNet database for your agency, continue on to step 3.

2.3 If the participant is already in the FamilyNet database, but not in your agency, exit and go to the "**Transfer-In From Inside Oregon**" window.

- The participant must first be transferred into your agency using the "**Transfer-In From Inside Oregon**" window.
- Refer to the *Completing a Transfer-In Within Oregon* section of this lesson to transfer the participant into your agency.
- Once the participant is transferred into your agency, complete the out-of-state transfer using the "**Transfer-In From Outside Oregon**" window.

3. Click on the "Return w/Client" button to return to "Transfer-In From Outside Oregon" window.

- The participant information is displayed in the "**Selection**" section of the window.
- The "**WIC ID**" and "**WIC Cat.**" fields are blank. These will be populated once you have completed and saved the "**WIC Intake**" screen.
- The "**Tr. Type**" field is populated with "**O**" to indicate this participant is an out of state transfer.

Completing the "WIC Intake" Screen

4. Complete the "WIC Intake" screen as instructed in the lesson "WIC Intake."

♫ NOTE: Participants certified on WIC in another state must be placed at the top of the waiting list if the local agency is at maximum caseload and not accepting new participants. Refer to Policy 653 for transferring in participants from out of state when an agency is at maximum caseload.

5. **Click in the "Start Date" field and enter the actual certification start date from the participant's transfer card.**

6. **Tab to the "End Date" field and enter the actual certification end date from the participant's transfer card.**

7. **Save.**

   The "**WIC ID**" and "**WIC Cat.**" fields are now populated.

Completing the "WIC Notes" Screen

8. **Click the "WIC Notes" tab.**

9. **Complete the "Notes" screen as needed.**

Completing the "Transfer Information" Screen

10. **Click the "Transfer Information" tab.**

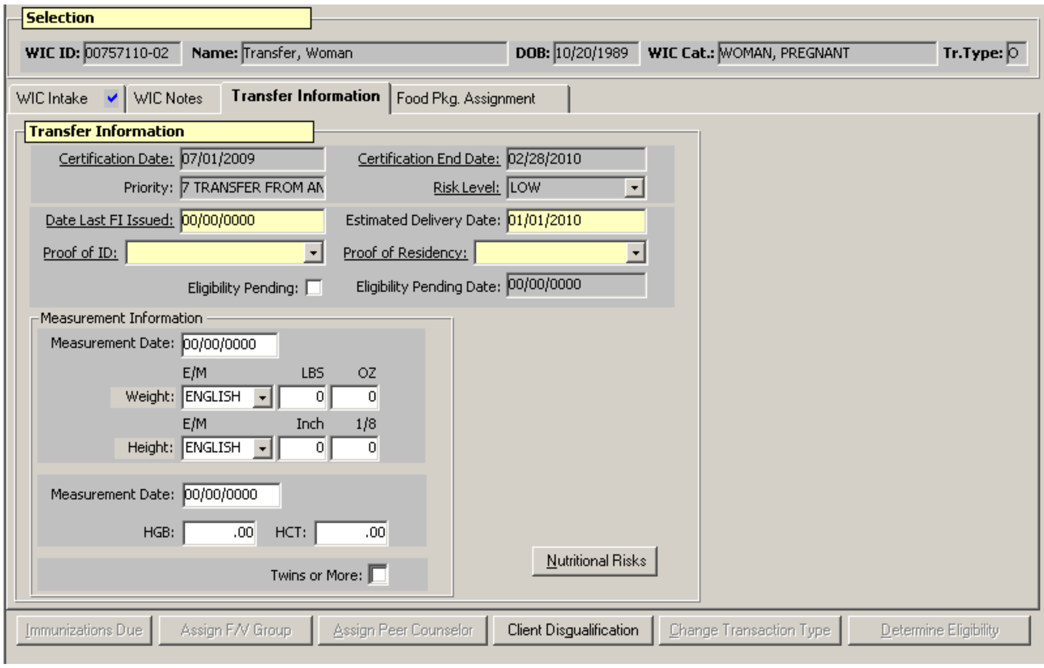


Figure 2: "Transfer Information" Screen

- Information from the VOC is entered in this screen.
- The "**Certification Date**" and "**Certification End Date**" are carried over from the "**WIC Intake**" screen.

11. Select the type of proof provided in the "Proof of ID" field.

12. Select the type of proof provided in the "Proof of Residence" field.

12.1 Check the "**Eligibility Pending**" box if the participant does not have the appropriate proofs with them. See Policy 610 *Required Proofs - Identity, Residency, Income* for more information.

13. Click the "Nutritional Risk" button in the lower right hand corner to open the pop-up.

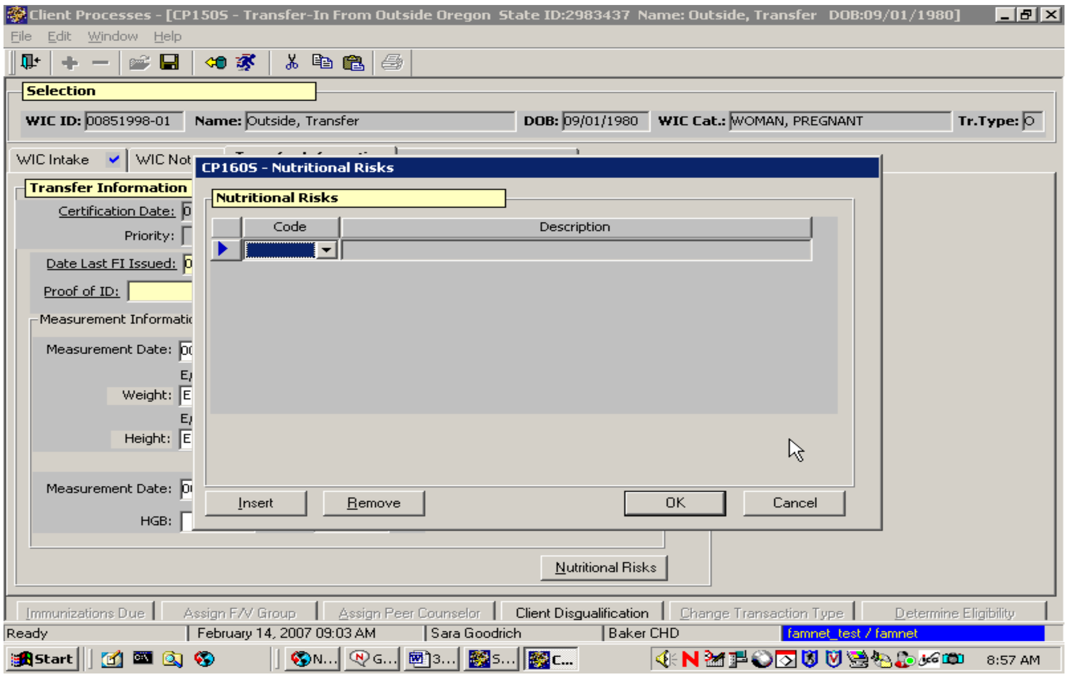


Figure 3: "Nutritional Risk" Pop-Up

- A risk must be assigned to complete the screen.
- The "**Risk Level**" field will be populated by the system once a risk has been assigned, but it may be modified.

14. Select the appropriate risk from the "Code" field drop down list.

- The "**Description**" will be displayed.
- To add multiple risks, click the "**Insert**" button to generate a new row and select the additional risk from the drop down.
- To remove a row, click the "Remove" button.

15. **Click "OK" to save your work and close the pop-up or "Cancel" to close the pop-up without saving.**

16. **Enter the date the participant last received benefits in the "Date Last FI Issued" field.**

17. **Modify "Estimated Delivery Date" if needed.**

18. **Enter "Measurement Information" if available.**

19. **Check the "Twins or more" check box if appropriate.**

20. **Complete the "Food Pkg. Assignment" screen.**

    See Chapter 3, Lesson 500 *Assigning and Forecasting Food Packages*.

21. **Save.**

22. **Go to the "Family Summary" screen to issue benefits.**

    See Chapter 3, Lesson 1100, *Family Summary Screen*.

23. **Go to the "Family Cardholder" screen to issue an eWIC card to the family.**

    See Chapter 3, Lesson 1200, *Family Cardholder*.

➥ *Practice Activity #1:*

Use the Practice Data base for this practice.

The starting point for this activity is:
Participant Processes ⇨ Transfers

1. Select "Transfer-In From Outside Oregon."
2. Perform a participant search.
3. Enter the participant information into "Client Demographics."
4. Close.
5. Click the "Return with Client" button.
6. Complete the "WIC Intake" screen using any information you want.
7. Enter one month ago as the Start Date.
8. Access the "WIC Notes" screen and enter a note stating "Transferred from Washington."
9. Access the "Transfer Information" screen and enter the risk "502 - Transfer of Certification."
10. Change the "Risk Level" to "High."

11. In the "Date Last FI Issued" field enter the first of last month.
12. Leave "Medical Date" blank.
13. Save your work.
14. Write the WIC ID number down on a piece of paper. You will need it later in the activity.
15. Exit.

Completing a Transfer-In Within Oregon

Use this process to transfer-in a participant from another agency within Oregon.

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

1. **Select "Transfer-In From Within Oregon."**

2. **Retrieve the participant for whom you wish to transfer-in.**

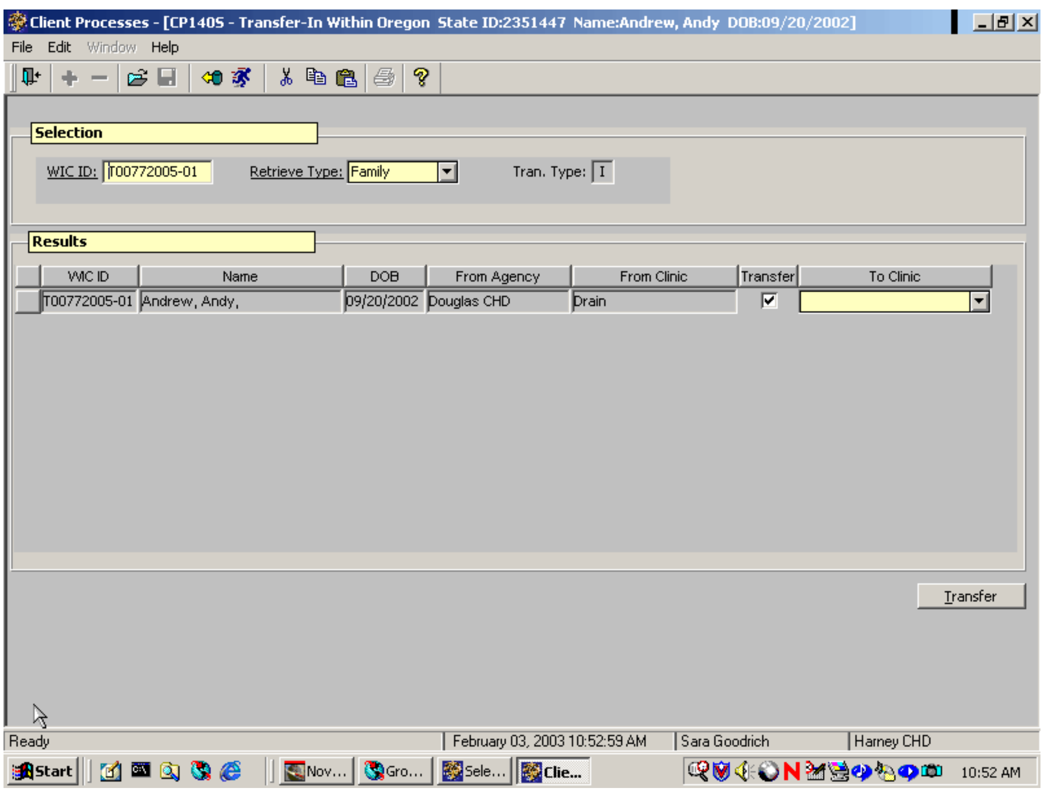


Figure 4: "Transfer-In Within Oregon" Screen

- The "**WIC ID**" field is populated with the participant's current ID number.

- The "**Tran. Type**" field is populated with an "**I**" to indicate this 4. participant is a transfer within Oregon.

3. **Click in the "Retrieve Type" field.**

   - If "**Client**" is selected, only the individual participant will be displayed in the "**Results**" section and marked for transfer.
   - If "**Family**" is selected, all members of the family will be displayed in the "**Results**" section and marked for transfer.

4. **Uncheck the "Transfer" box if you do not want to transfer a specific member in the family.**

5. **In the "Clinic" field, select the new clinic from the drop down list.**

6. **Click the "Transfer" button in the lower right hand corner.**

   - Participants at permanent sites are transferred immediately.
   - The screen is cleared of all information.
   - You may fast path to another window but the participant's information is not carried forward.

7. **Verify and update client demographic information on the "Client Primary" screen.**

   Refer to Chapter 2, Lesson 100 *Client Search and Demographics* to enter client primary information.

8. **Verify benefit issuance and appointment information on the "Family Summary" screen.**

♫ NOTE: Terminated participants may be transferred. Terminated participants still within their certification period may be reactivated. Terminated participants whose certification period has expired will be transferred but must be recertified.

➥ *Practice Activity #2:*

Use the Practice Data base for this practice.

The starting point for this activity is:
Client Processes ⇨ Transfers

1. Select "Transfer-In From Within Oregon."
2. Click on the "Open" icon to access "Client Search" and from the activity sheet.

3. Click the “Return with Client” button.
4. Select your clinic from the drop down list in the “To Clinic” field.
5. Click the “Transfer” button in the lower right hand corner.
6. Update the “Client Primary” information.
7. Exit.

Printing a VOC/Transfer Card

Participants may request transfer information when they are moving out of state. This is called a Verification of Certification (VOC) card. TWIST will print a VOC card for any participant on demand. You will need the participant's WIC ID number before you access the window.

The starting point for this section is:

Client Processes ⇨ Outputs

1. **Select "Documents" and "VOC Card" from the drop down menus.**

2. **Enter the participant's WIC ID number.**

   You can also search and return with the participant from Client Primary. The system will fill in the participant's WIC ID number.

3. **Click the "Run" icon to display the WIC Transfer Card.**

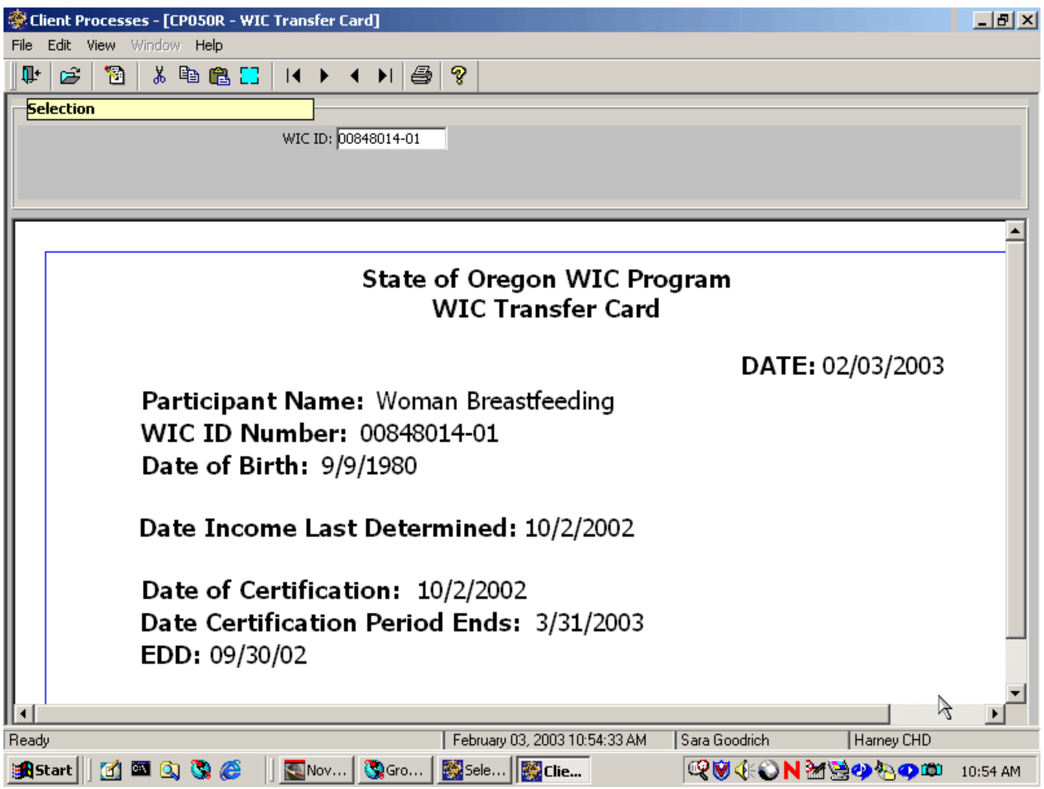


Figure 5: "WIC Transfer Card" Screen

Use the scroll bars to view all the information.

4. **Click the “Print” icon to print the VOC card.**

5. **Exit.**

NOTE: Consider terminating the participant using the “Move Out-of-State” termination reason after you print the transfer card. See Chapter 3, Lesson 805, *Termination and Ineligible* for more information.

➥ *Practice Activity #3:*

Use the Practice Data base for this practice.

The starting point for this activity is:
Client Processes ⇨ Output ⇨ Documents ⇨ VOC Card

1. Enter the WIC ID number in the WIC ID field.
2. Click the “Run” icon.
3. Use the scroll bars to view all the information.
4. Exit the window.

✂ *Tips and Shortcuts:*

- From the transfer window you may fast path to:
  - “Certification, Infant/Child”
  - “Certification, Woman”
  - “Client Master Demographics”
  - “Family Appointments”
  - “Family Cardholder”
  - “Family Summary Screen”
  - “Family Summary Screen (Old)”

- After a participant(s) has been transferred you may want to go to the “Family Summary Screen” to determine what you need to do next.
- You may edit information in the “Transfer-In From Outside Oregon” screen the day you enter the data. However after the “End of Day Processes” has run, the information in this window may not be changed.
- Terminated participants, both active and non-active, still need to be transferred in order to prevent duplicate records. Non-active termed participants can then be given an appointment. Termed participants still within their certification period can be reactivated when appropriate.
- When there are overlapping dates in the “Start Date” and “End Date” fields, the system will automatically adjust to the next available date.

✍ Notes

Chapter 3: Client Processes
Section 8: Other Client Processes
Lesson 805: Terminations/Ineligible

Objectives:

Upon completion of this lesson the user will be able to:
- Complete a termination transaction for client or a family;
- Identify actions that will cancel and re-open appointments;
- Print an individual ineligibility or graduation notice;
- Batch print ineligibility or graduation notices;
- Change the termination notification date; and
- Differentiate between ineligibility and termination whether it is done automatically by the system or is manually keyed in.

Oregon Policies:

♦ 636 Participant Notification: Ineligibility and Termination From WIC

Overview:

A client may be terminated automatically by TWIST or manually by the user for a variety of reasons. TWIST automatically terminates clients who are no longer eligible due to a category change, end of certification, not using benefits for two consecutive months, or death. The user may also manually terminate a client for abuse, voluntary withdrawal, dual participation, or moving out of state. The notifications for terminations are put on the FamilyNet website and are printed by the local agency.

When a client is terminated, TWIST will automatically remove the benefits from their eWIC account. Depending on the reason for termination, the benefits may be removed for both the current and future months or just for the future months.

Clients terminated from the system are changed to a "Display" only mode and the user may update only limited information. Clients must have an active certification in order for the user to terminate. Clients who are found ineligible during the certification process are not terminated, but are marked as ineligible. A client might be found ineligible due to income ineligibility or no medical/nutritional risk. When this occurs, a message will pop-up stating "The certification is complete but the client is still ineligible. Click on the Determine Eligibility Button to view reasons."

When a client is terminated or marked ineligible, the user is unable to issue benefits for them. Clients automatically terminated will also have their next scheduled appointment automatically canceled. This appointment slot will then be re-opened in the appointment scheduler. Clients manually terminated will need to have their next scheduled appointment canceled manually. Refer to the Canceling an Appointment lesson for how to cancel an appointment. Appointment requests for terminated clients will become inactive. If the client is reactivated, their appointment request will become active and available to auto schedule. Refer to the Appointment Requests lesson for how to reschedule an appointment.

In this lesson you will learn how to manually terminate clients through the "Change Transaction Type" pop-up and how to print batch termination notices from the FamilyNet website.

Instruction:

Manually Terminating a Client

The starting point for this section is:

Client Processes ⇨ Enrollment & Intake ⇨ Enrollment

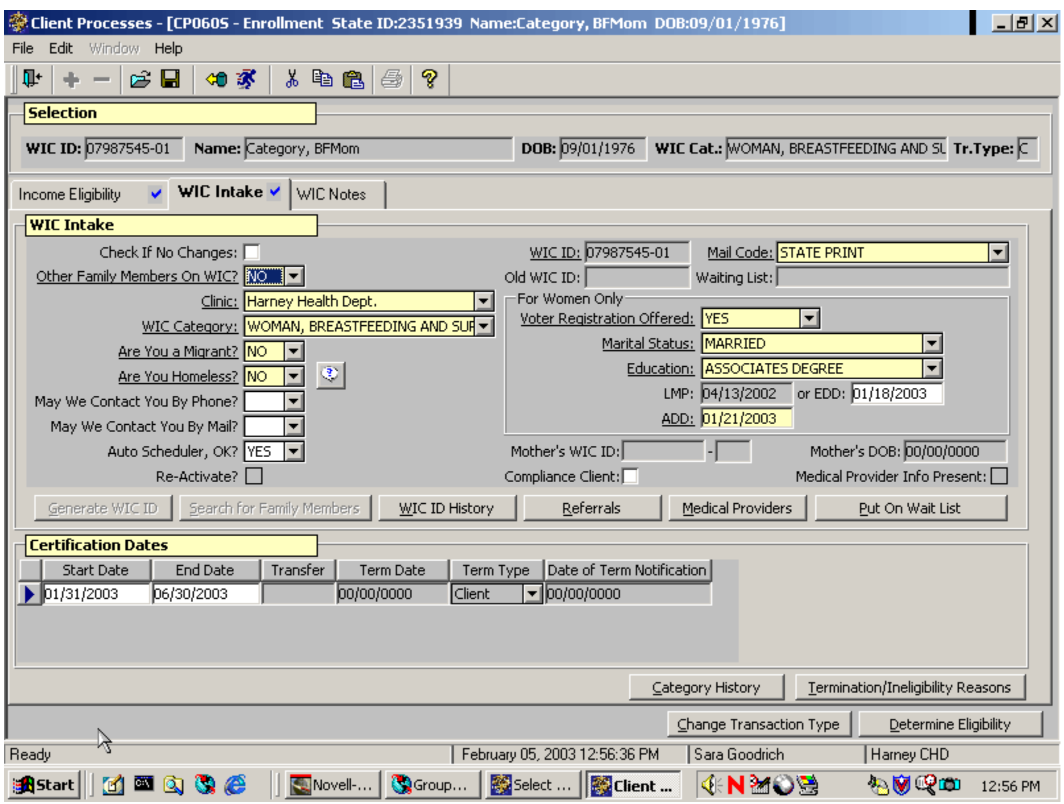


Figure 1: "WIC Intake" Screen

1. **Retrieve the client you wish to terminate from the WIC Program.**

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

   2.1 Verify the client's transaction type is marked "C" for change.

   2.2 Verify the certification end date is a future date.

   2.3 Verify the "Term Date," "Term Type" and "Date of Term Notification" are disabled.

3. **Click the "Change Transaction Type" button in the lower right hand corner.**

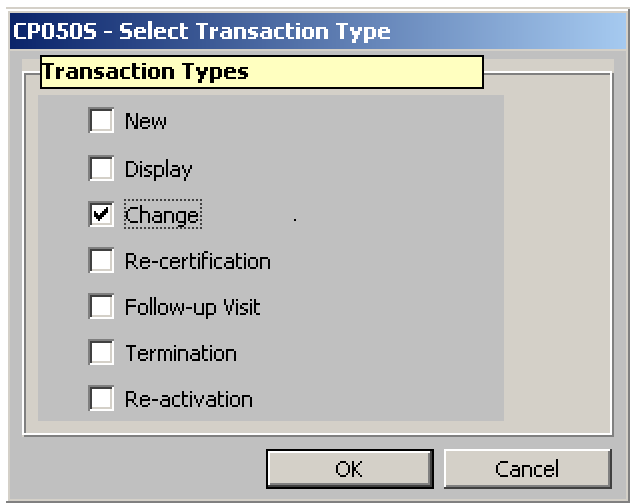


Figure 2: "Change Select Type" Pop-Up

4. **Check the "Termination" check box.**

5. **Click "OK" to save the change and close the pop-up.**

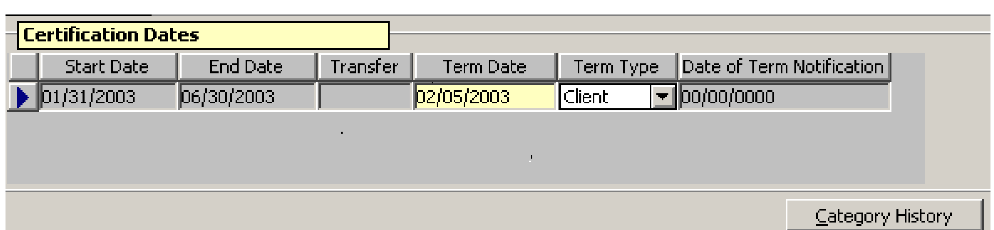


Figure 3: "WIC Intake" Screen with Term Information Enabled

- The "Tr. Type" field is changed to "T" to indicate the client is terminated from the program.
- "Term Date" and "Term Type" are now enabled.
- The "Term Date" defaults to the current date, but can be modified.
- The "Date of Term Notification" will auto fill when a notification is printed or when a date is entered in the manual notification pop-up.

6. **Select "Client" or "Family" from the drop down list in the "Term Type" field.**

- If "Client" is selected only the client will be terminated.
- If "Family" is selected all members of the family currently enrolled on WIC will be terminated.

7. **Click the "Termination/Ineligibility Reasons" button.**

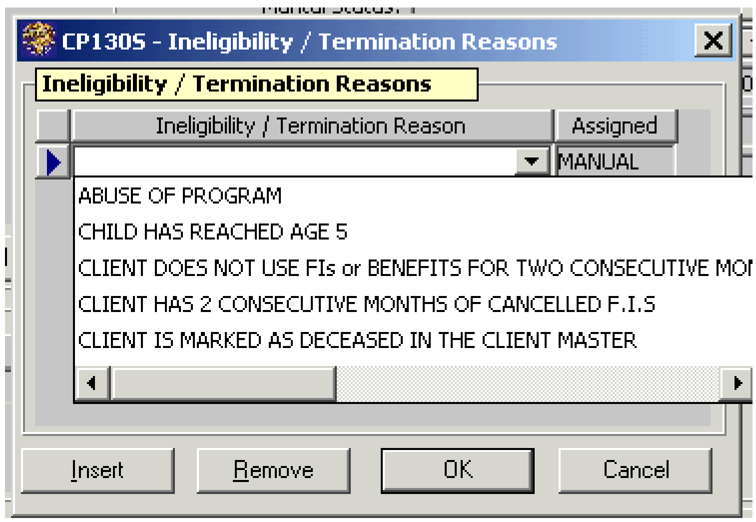


Figure 4: "Ineligibility/Termination Reasons" Pop-Up

8. **Select the reason for termination from the drop down list.**

- The system will default the "Assigned" field to manual.
- Use the "Insert" button to add additional reasons.
- Use the "Remove" button to delete a reason.
- Reasons assigned by the system may not be removed.
- Use the "OK" button to save your work and close the pop-up.
- Use "Cancel" to close the pop-up without saving your work.

♫ NOTE: When a client is manually terminated, TWIST will remove the benefits from their eWIC account. Depending on the reason for termination, the benefits may be removed for both the current and future months or just for the future months.

☺ **See Job Aid "Terminations and Benefit Issuance" for more information.**

9. **Save.**

A message pops up stating, "The client is terminated. Do you want to issue a Graduation Notice?"

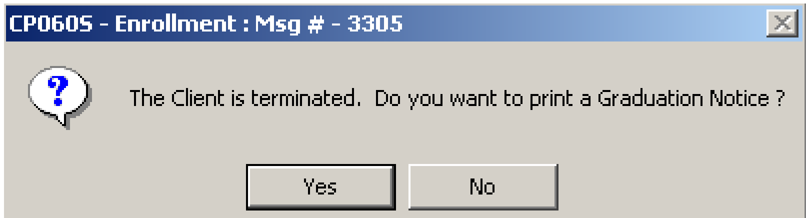


Figure 5: "Graduation Notice" Pop-Up

10. **Click "Yes" to go to the "Graduation Notice" screen and close the pop-up.**

    10.1 Clicking "No" will close the pop-up without going to the "Graduation Notice" screen. If a notice is not printed now, one will automatically be produced and put on the FamilyNet website on Sunday of the next week.

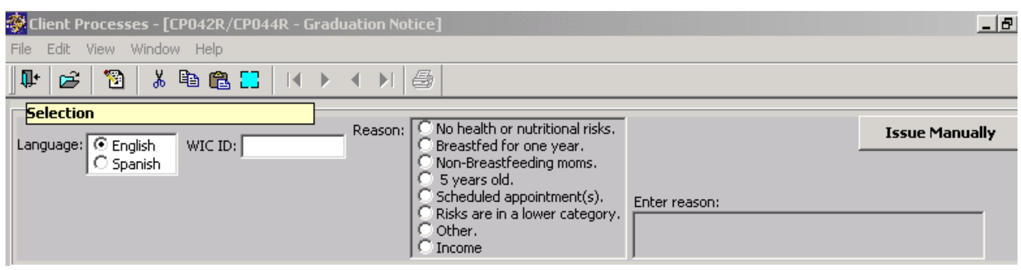


Figure 6: "Graduation Notice" Screen

Printing a Graduation Notice in TWIST

♫ NOTE: See the section "Providing a Manually Issued Graduation Notice" for information on manually entering a "Date of Term Notification."

11. **Select the appropriate language by clicking in the corresponding circle.**

♫ NOTE: The "WIC ID" field auto-fills.

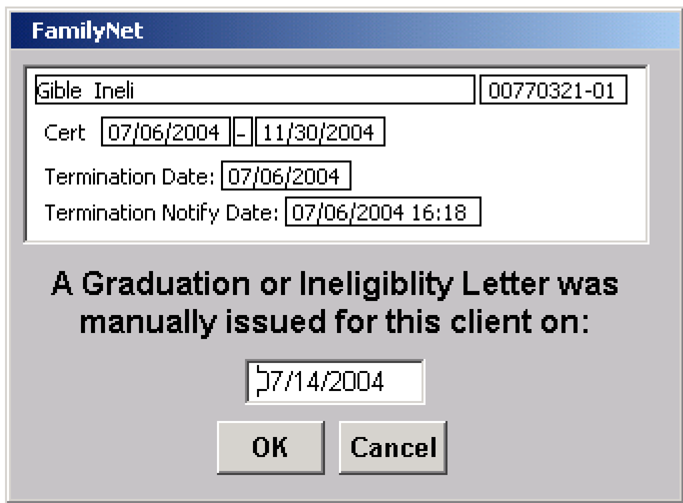
12. **Select the "Reason" by clicking the appropriate circle.**

If "Other" is selected, type the reason in the "Enter Reason" field.

13. **Click the "Run" icon.**

- The notice will display.
- Use the scroll bars to the right and at the bottom to view the entire notice.

14. **Click the "Print" icon to print the notice.**



Providing a Manually Issued Graduation Notice

1. **Click on the "Issue Manually" button, instead of completing steps 11 to14.**

Figure 7: "Manually Issued" Pop-Up

15. **After verifying the data is correct, click "OK."**

- Use this process if a hand-completed notice is being issued to the participant. This documents the date of termination notification in TWIST (e.g. no laser printer is available or is inconvenient to print a notice in TWIST.)
- The date may be changed if necessary.
- If the date entered is not valid, you will get an error message and be returned to the pop-up to correct the date.

17. **Exit.**

- The "Tr. Type" field is changed to "D" to indicate that the client is now display only.

- The "Term Date" and "Term Type" fields are disabled.
- "Date of Term Notification" is auto-filled with today's date.
- Only the following fields in the client record are modifiable once a client has been terminated.
  - WIC Category
  - Are you Migrant?
  - Are you Homeless?
  - Put On Wait List
  - WIC Notes
  - Family Appointment Record

Printing an Ineligibility Notice

If a client is found to be ineligible during an enrollment, the system will notify you of their ineligibility and ask if you want to print an ineligibility notice. If you select "yes," the system will print a notice and document the date of notification. You may also enter a date of notification if an ineligibility letter is manually completed.

Printing an Ineligibility Notice on Demand

Starting point for this section is:
Client Processes ⇨ Outputs ⇨ Documents ⇨ Ineligibility Notice

1. **Retrieve the client for whom you wish to print an ineligibility letter.**

2. **Select the appropriate language by clicking in the corresponding circle.**

3. **Select the "Reason" by clicking the appropriate circle.**

   If "Other" is selected, type the reason in the "Enter Reason" field.

4. **Click the "Run" icon.**

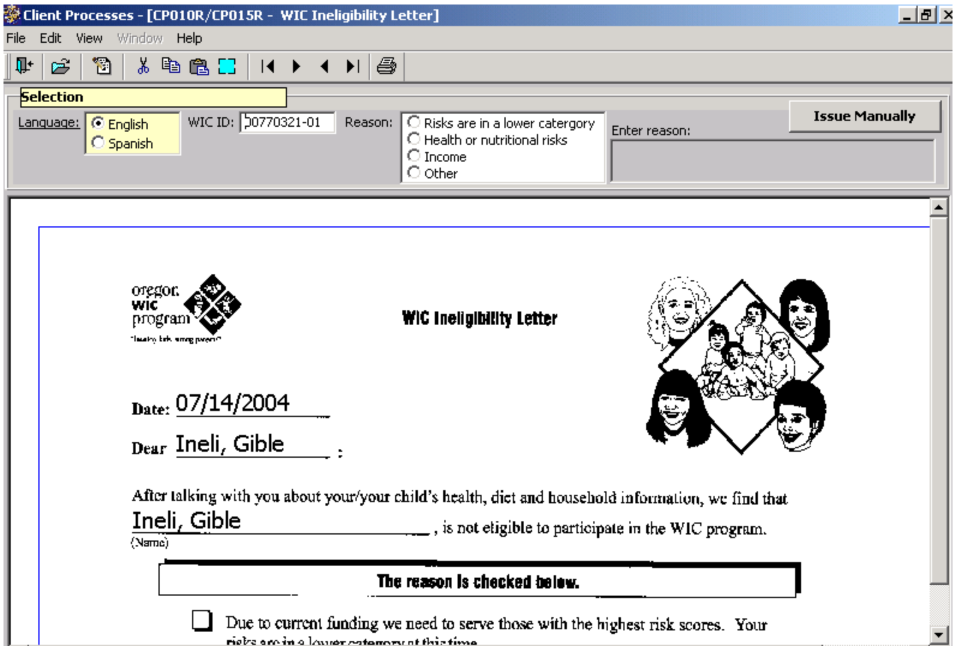


Figure 8: "WIC Ineligibility" Screen with notice

- The notice will display.
- Use the scroll bars to the right and at the bottom to view the entire notice.

5. **Click the "Print" icon to print the notice.**

6. **Click on the "Issue Manually" button, instead of completing steps 2 to 5.**

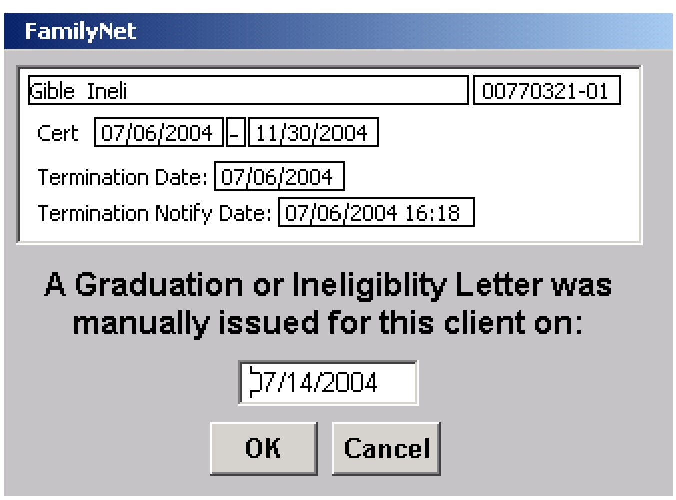


Figure 9: "Manually Issued" Pop-Up

7. **After verifying the data is correct, click "OK."**

- Use this process to manually issue a notice to the participant. This documents the date of notification in TWIST.
- The date may be changed if necessary.
- If the date entered is not valid, you will get an error message and returned to the pop-up to correct the date.

8. **Exit.**

Printing a Termination/Graduation Notice On Demand

You may print a termination/graduation notice for a client on demand.

Starting point for this section is:
Client Processes ⇨ Outputs ⇨ Documents ⇨ Termination Notice

1. **Retrieve the client for whom you wish to print a termination notice.**

2. **Select the appropriate language by clicking in the corresponding circle.**

3. **Select the "Reason" by clicking the appropriate circle.**
If "Other" is selected type the reason in the "Enter Reason" field.

4. **Click the "Run" icon.**

- The notice will display.
- Use the scroll bars to the right and at the bottom to view the entire notice.

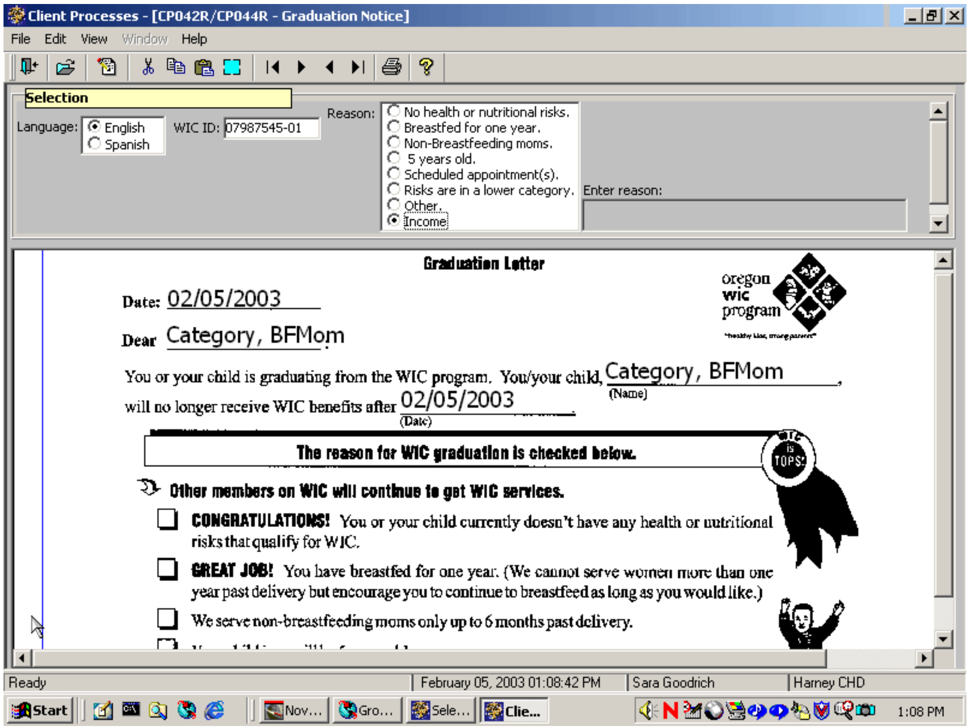


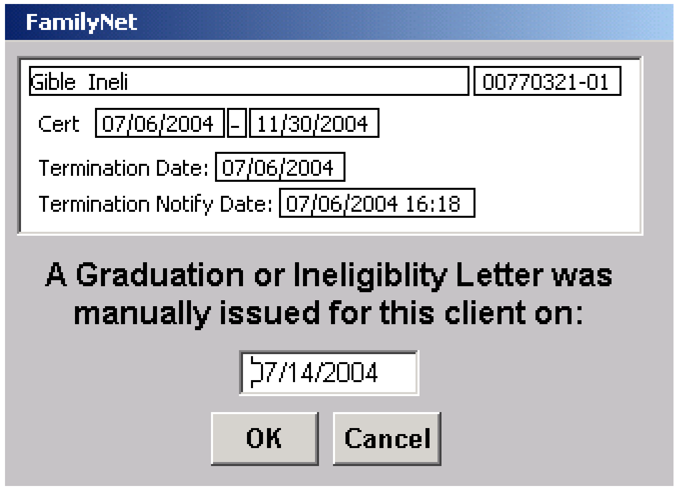
Figure 10: "Graduation Notice" Screen with Notice

5. **Click the "Print" icon to print the notice.**

Manually Entering "Term Date of Notification" When Providing a Manually Issued Graduation Notice

6. **Click on the "Issue Manually" button, instead of completing steps 2 to 5.**

Figure 11: "Manually Issued" Pop-Up



7. **After verifying the data is correct, click "OK."**

   - Use this process if it is inconvenient to print a notice in TWIST and a hand completed notice is being issued to the participant. This documents in TWIST the date of termination notification.
   - The date may be changed if necessary.
   - If the date entered is not valid, you will get an error message and returned to the pop-up to correct the date.

8. **Exit.**

Printing Batch Ineligibility or Graduation Notices

As part of End of Day, End of Month, or Batch Print processes, TWIST will identify any clients who:

- Were ineligible during that time period and did not have an Ineligibility Notice printed by the system or date of notification entered into the system;
- Were terminated during that time period and did not have a Graduation Notice printed by the system or date of notification entered into the system; or
- Will be termed the following month because they will be categorically ineligible (Soon to Grad).

TWIST will produce the appropriate notices and place them on the website to be opened and printed by a local agency staff person. These notices must be printed and mailed to clients in accordance with Policy 636.
♫ NOTE: Notices will stay on the website until the 27th of the following month. They must be printed and mailed in a timely fashion. See Policy 636 for details.

Notices will be batched together and placed on the website each week on Sunday night. Notices are in PDF format.

1. **Access the internet and go to** http://famnet.hr.state.or.us

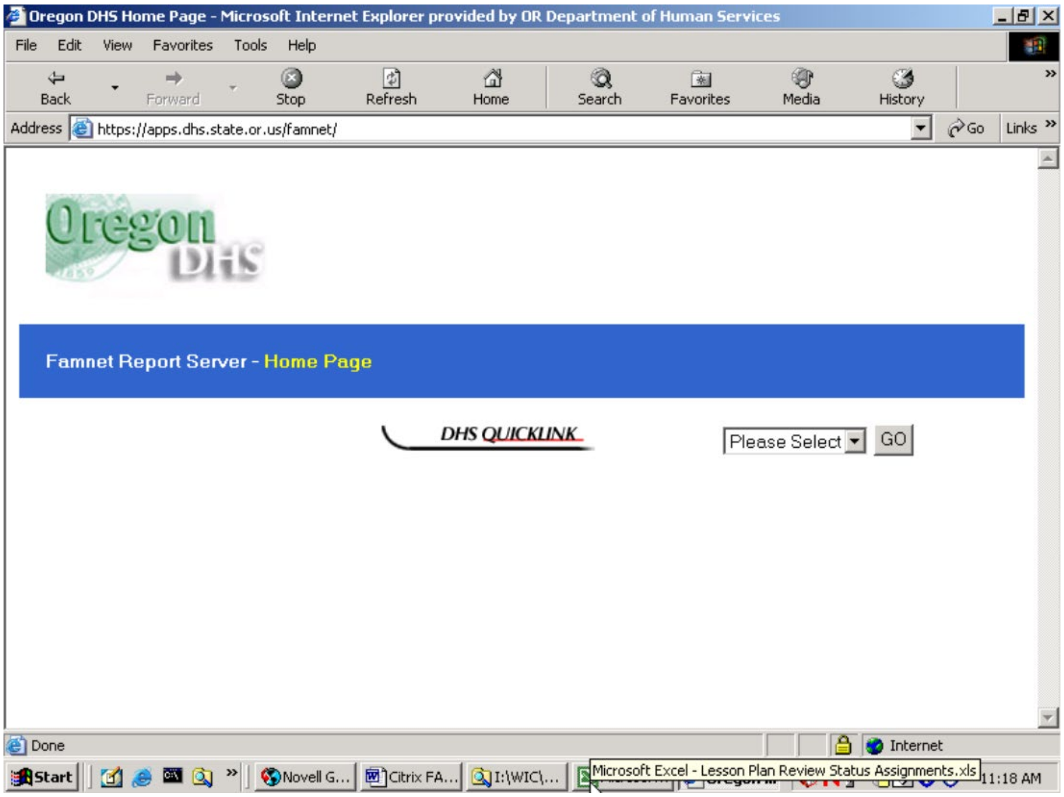


Figure 12: Internet Site

2. **Select your agency name from the drop down and click Go.**

3. **In the pop-up, enter your user name and password.**

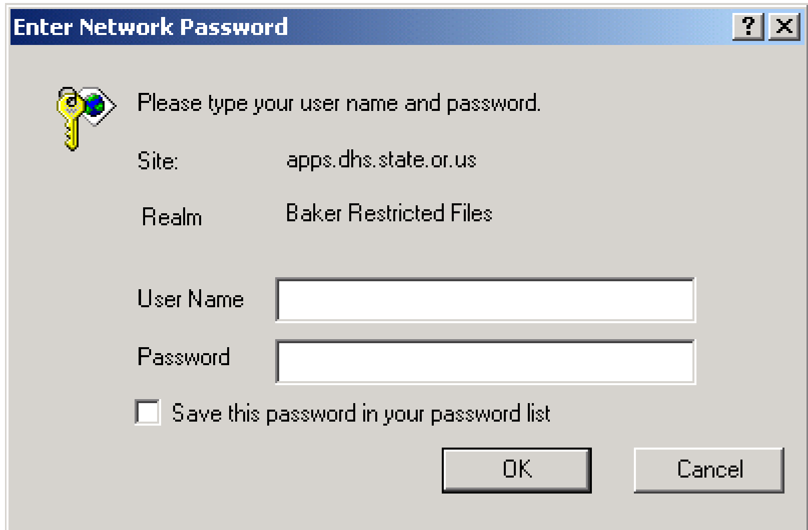


Figure 13: Login Pop-up

♫ NOTE: User names and passwords for this screen are different than those set by your agency staff. These must be set by state IS staff since they allow access to the state website. Have your local agency coordinator call Application Support for a login and password, if you need to have access to this site.

4. **Click on the file of notices you wish to open.**

   - The naming convention for the files is clinic number, notification type, language, date run.

Example: "02GradEng0330.PDF" are graduation notices for clinic 02 in English that were produced on March 30.

5. **Print the selected notices.**

Printing Mailing Labels for Batch Notices

TWIST will print mailing labels for specific batches of ineligibility or graduation notices. These labels are formatted for standard three-across Avery mailing labels. Each label will have the WIC ID number for the client at the top.

The starting point for this section is:
Client Processes ⇨ Outputs ⇨ Documents ⇨ Client Mailing Labels

1. **Select the clinic for which you wish to print labels.**

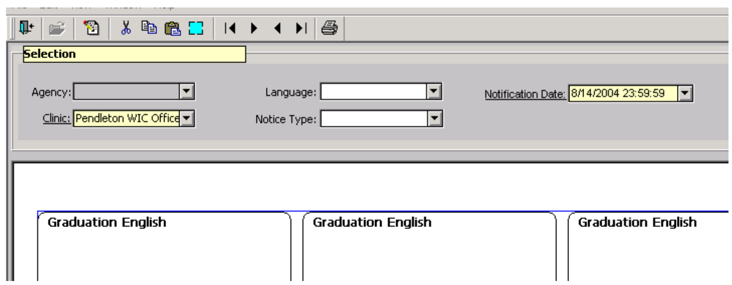
   1.1 If you leave the "Language" and "Notice Type" fields blank, all clients having any kind of notice to be printed for the date selected will have a label produced in one file.

1.2 Selecting a "Language" or "Notice Type" will limit the mailing notices to be printed to those matching that selection criterion.

2. **Select the date of the batch of notices for which you wish to print labels.**

Figure 14: "Client Mailing Labels" Document

2.1 Dates will correspond to the weekly dates notices are placed on the website.



3. **Click "Run."**

3.1 TWIST will print three labels with the type of notice the participant will be receiving. For example, the words "Graduation English" will print on three labels, followed by the appropriate mailing labels, then the words "Ineligibility English" will print on three labels, followed by the appropriate mailing labels and so on.

4. **Click "Print."**

✂ *Tips and Shortcuts:*

- From the "Enrollment" screen you may fast path to:
  - "Client Master Demographics"
  - "Family Appointments"
  - "Infant/Child Certification"
  - "View Client Status"
  - "Woman Certification"

- TWIST will automatically produce ineligibility or graduation notices weekly for those clients without documented notification.

- A client must have a WIC ID number before an ineligibility letter can be printed or a date of notification can be entered.

➥ Practice Activity:

Use the information from your ☛ Activity Sheet to complete the activity.

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

1. Retrieve the client from the Activity Sheet.
2. Click “WIC Intake.”
3. Verify transaction type is “C.”
4. Verify certification end date is a future date.
5. Click the “Change Transaction Type” button.
6. Check the “Termination” box.
7. Click “OK” to close the pop-up.
8. Enter today’s date in the “Term Date” field.
9. Select “Client” as the “Term Type.”
10. Save.
11. Click the “Termination/Ineligibility Reasons” button.
12. Select “Abuse of Program” as the reason for termination.
13. Click “OK” to close the pop-up.
14. Click “Yes” to go to the “Graduation Notice” screen and close the pop-up.
15. Select English as the language.
16. Select “Other” as the reason.
17. In the “Enter reason” field type “Dual participant.”
18. Click the “Run” icon.
19. Use the scroll bars to view the entire notice.
20. Click the “Print” icon to print the form.
21. Exit back to “Client Processes.”

✓ Skill Check:

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

The client is a child who is in for recertification. She no longer has a nutritional risk. Follow the appropriate steps to “Graduate” this client.

✍ Notes

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.

♬ NOTE: Do NOT do a category change when a woman returns to WIC with a new pregnancy. For an existing client with a new pregnancy, use "Re-instate" to start a new certification.

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."**

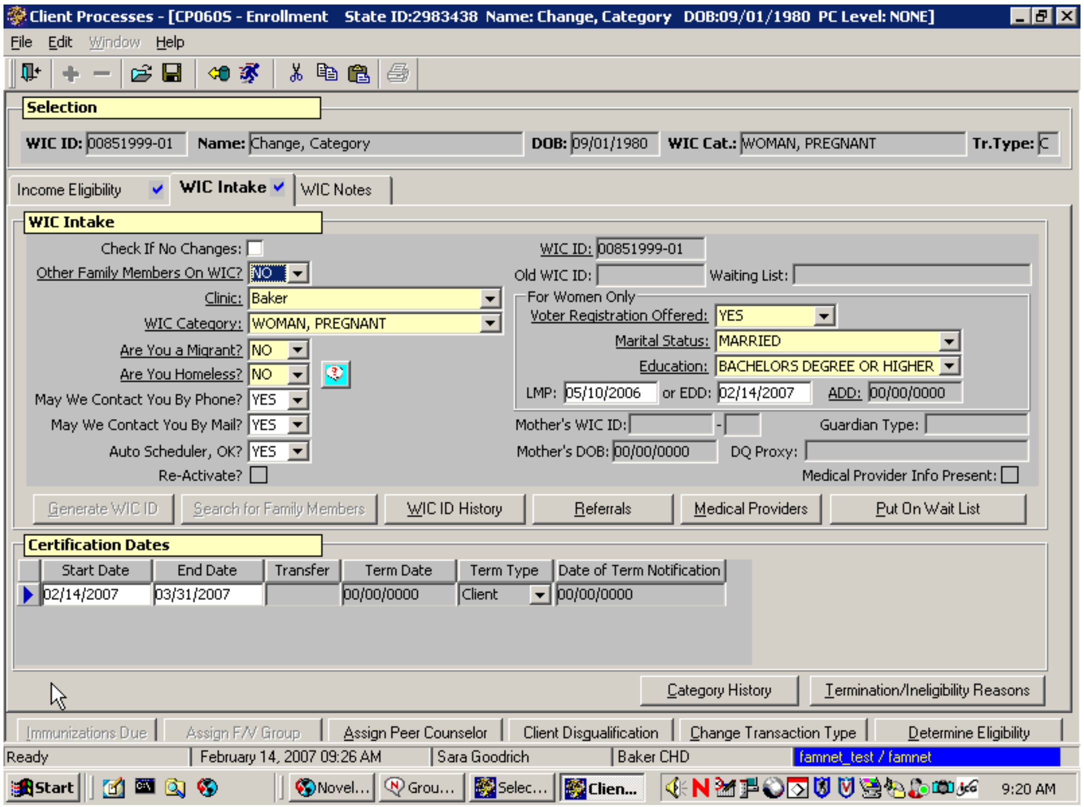


Figure 1: "WIC Intake" Screen

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.

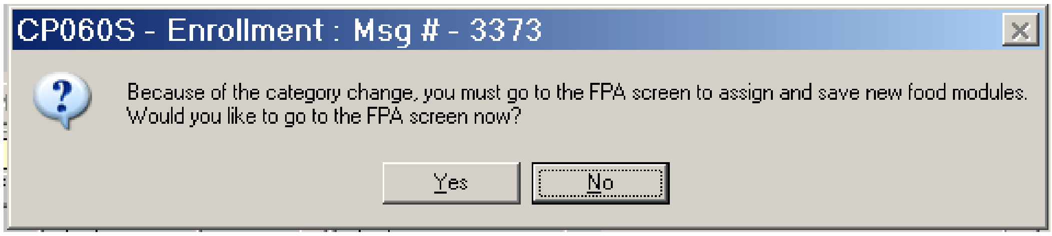


Figure 2: "Category Change" message

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

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

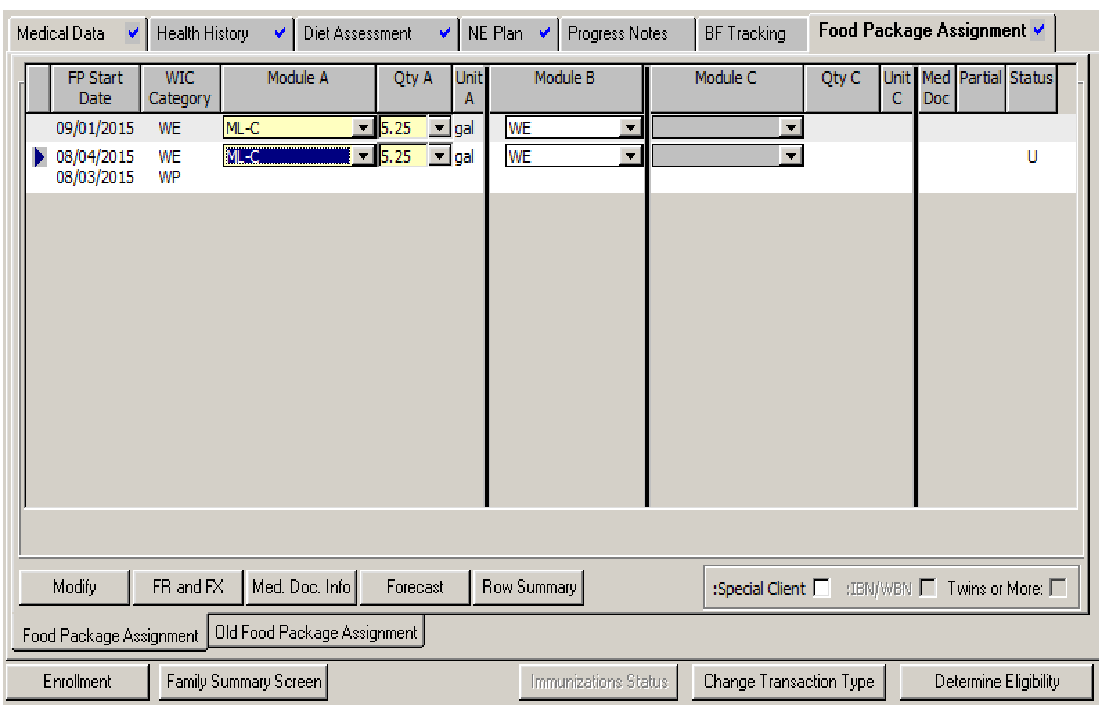


Figure 3: "Food Package Assignment" Screen

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 that 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.”**

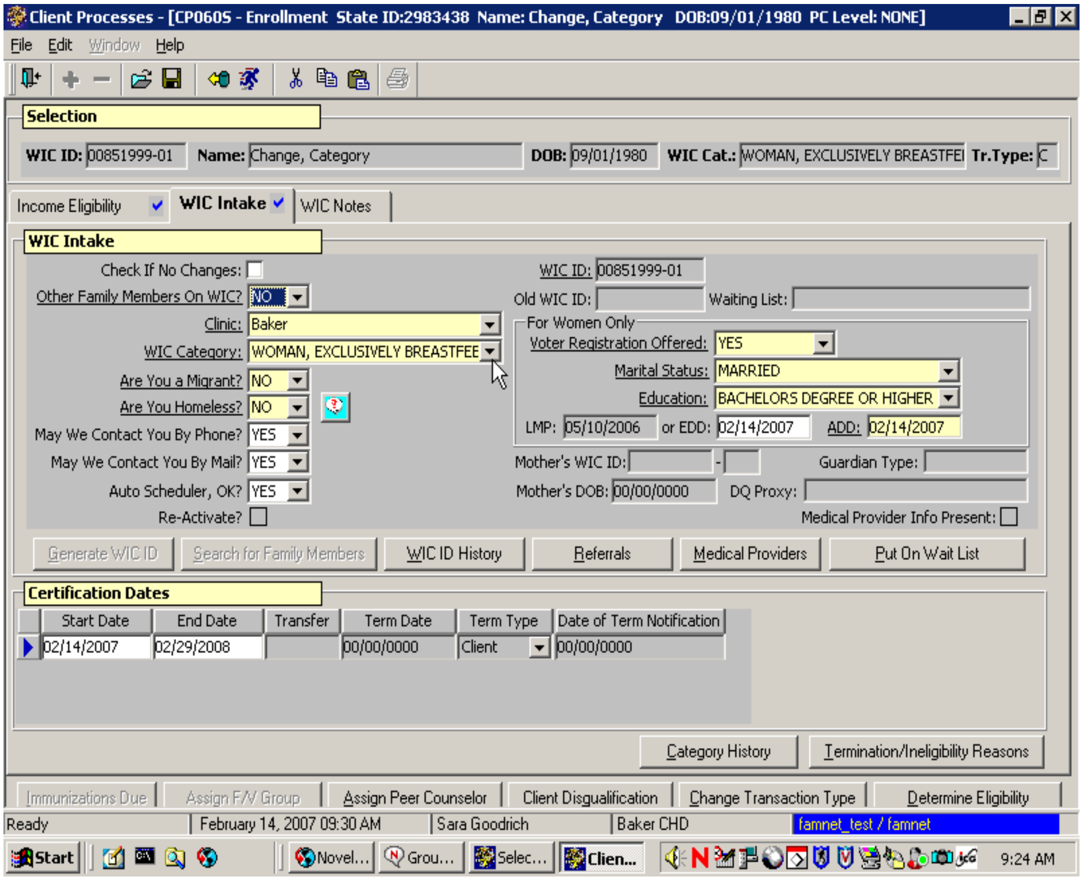


Figure 3: "WIC Intake" Screen

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.

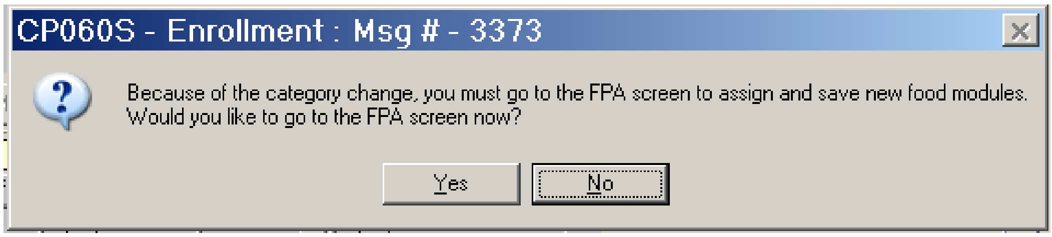


Figure 4: "Category Change" Message

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:

Chapter 3: Client Processes

Section 8: Other Client Processes

Lesson: Immunization Status Button

Objectives:

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

1. Identify and locate the immunization status button;
2. Understand what the options are that appear on the immunization button; and
3. Identify when it is necessary to print a referral letter.

Oregon Policies:

♦ 481 Immunization Screening & Referral Protocol

Overview:

In an ongoing effort to increase the number of WIC kids that are fully immunized, both the State WIC and Immunization programs work together to ensure immunization screening occurs.

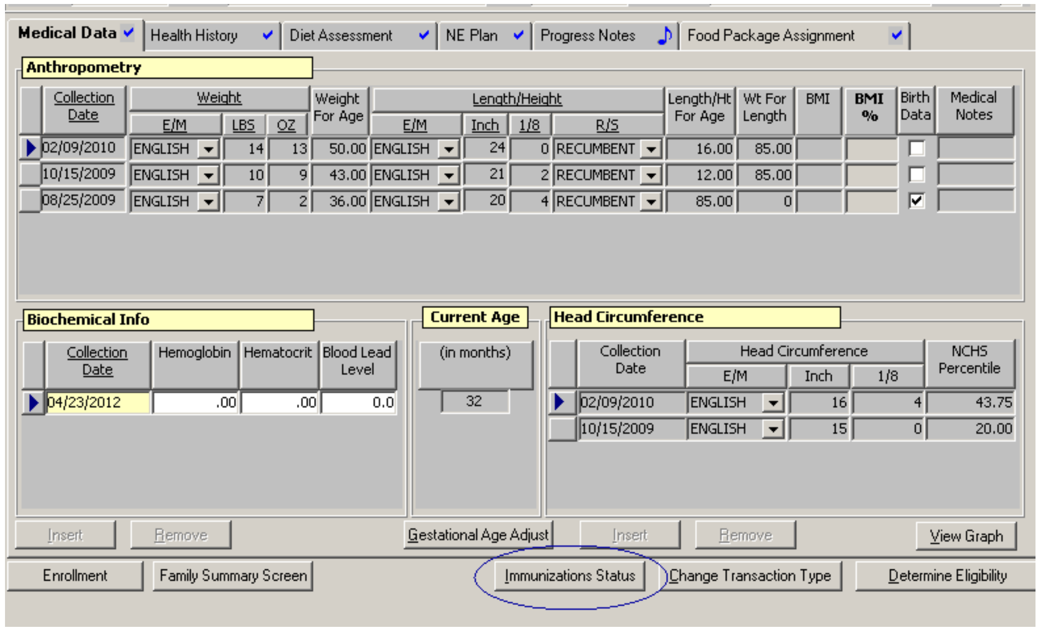
This lesson will show the functionality within TWIST to assist in the immunization screening process for WIC staff. The data is pulled from the ALERT Immunization Information System, or ALERT IIS - the statewide immunization registry that includes immunization histories from both public and private providers.

Instruction:

Location of Immunization Status button

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

♬ NOTE: The Immunization Status button can be accessed on "**Enrollment**" or **"Certification" windows.** All steps to access will remain the same.



1. Click on the "Immunization Status" button.

One of three pop-ups will appear.

- **Immunizations are due**
- **New WIC Client. Immunization data not available.**
- **Immunizations are up-to-date**

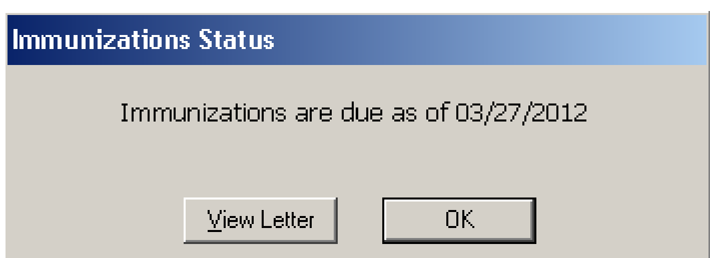


Figure 2: "Immunizations are Due" Pop-Up

1.1. **"Immunizations are due as of x date"** appears when the system is able to generate a forecast based on the immunization histories found in ALERT IIS. The date indicates the date the data was uploaded from Alert. A referral should be made.

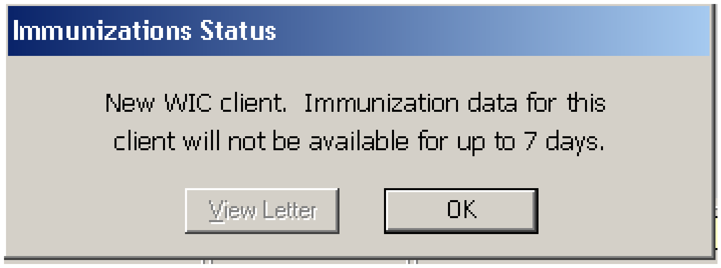


Figure 3: "New WIC Client. Immunization data not available" Pop-Up

1.2. **"New WIC Client. Immunization data for this client will not be available for up to 7 days"** appears when the system is unable to make a forecast match. A referral should be made.

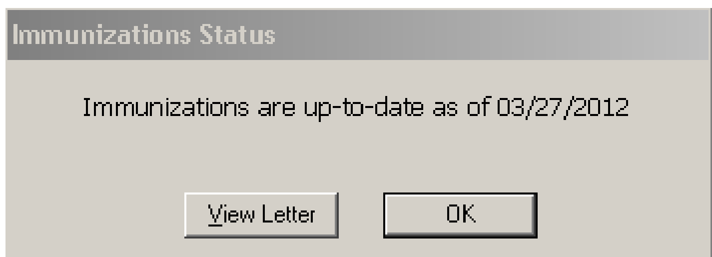


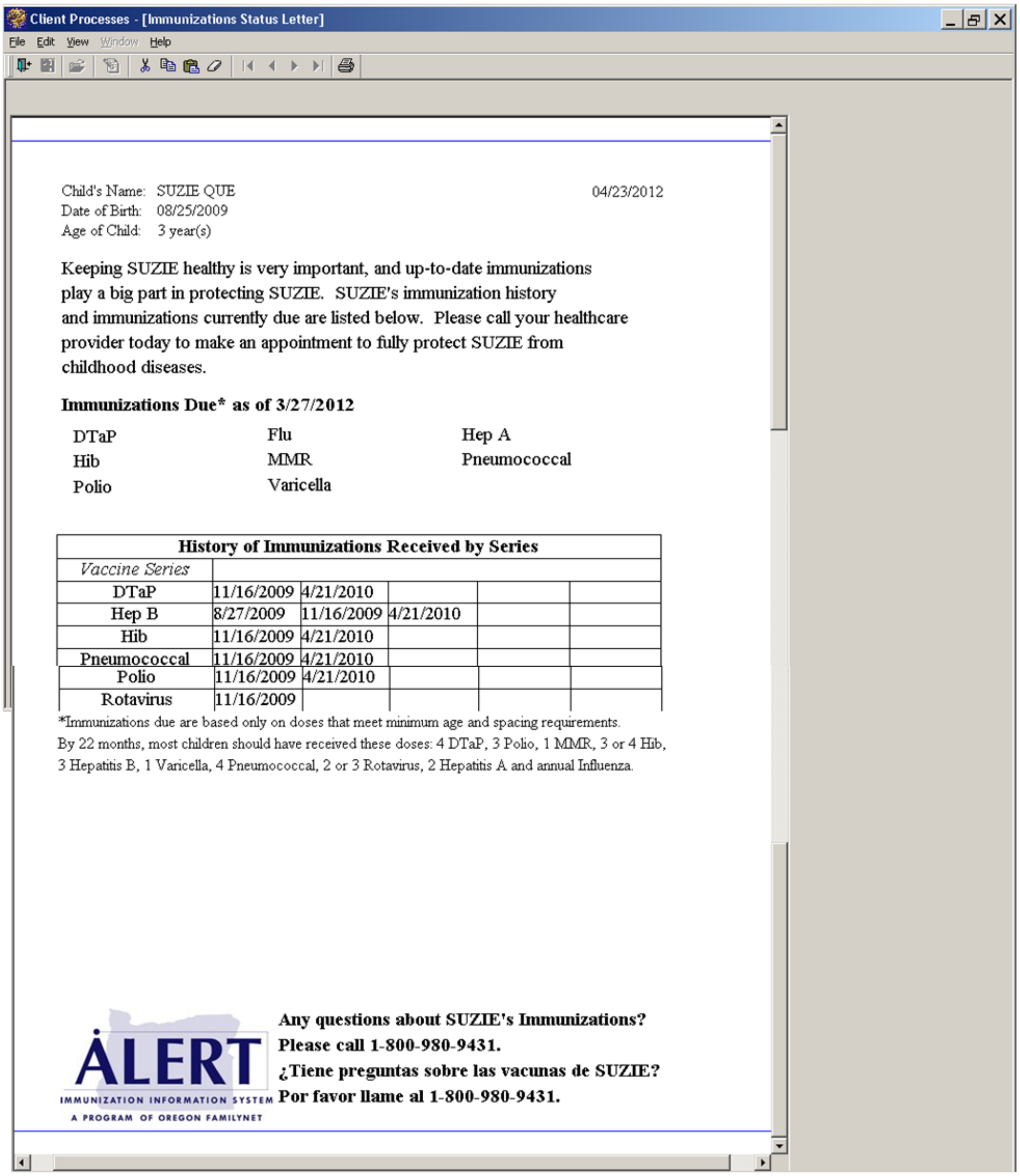
Figure 4: "Immunizations are up-to-date" Pop-Up

1.3. **"Immunizations are up-to-date as of x date"** appears when the system finds that the participant does not need vaccines at this time. The date indicates the date the data was uploaded from Alert. A referral is not needed.

2. Click on the "**View Letter**" button to see the referral letter and the immunization data it includes.

Referral Letter & Printing

The immunization referral letter now includes immunization histories in addition to the child's name, date of birth and age. The date listed under "**Immunizations Due as of x**", is the date ALERT uploaded the data. ALERT updates immunizations weekly. There may have been immunizations given since that time or there may have been immunizations that were not recorded in Alert at that time. This information serves as adequate screening to meet WIC policy.



Client Processes - [Immunizations Status Letter]

Child's Name: SUZIE QUE 04/23/2012
Date of Birth: 08/25/2009
Age of Child: 3 year(s)

Keeping SUZIE healthy is very important, and up-to-date immunizations play a big part in protecting SUZIE. SUZIE's immunization history and immunizations currently due are listed below. Please call your healthcare provider today to make an appointment to fully protect SUZIE from childhood diseases.

Immunizations Due* as of 3/27/2012

DTaP	Flu	Hep A
Hib	MMR	Pneumococcal
Polio	Varicella	

History of Immunizations Received by Series

Vaccine Series					
DTaP	11/16/2009	4/21/2010			
Hep B	8/27/2009	11/16/2009	4/21/2010		
Hib	11/16/2009	4/21/2010			
Pneumococcal	11/16/2009	4/21/2010			
Polio	11/16/2009	4/21/2010			
Rotavirus	11/16/2009				

*Immunizations due are based only on doses that meet minimum age and spacing requirements.
By 22 months, most children should have received these doses: 4 DTaP, 3 Polio, 1 MMR, 3 or 4 Hib, 3 Hepatitis B, 1 Varicella, 4 Pneumococcal, 2 or 3 Rotavirus, 2 Hepatitis A and annual Influenza.

ALERT IMMUNIZATION INFORMATION SYSTEM
A PROGRAM OF OREGON FAMILYNET

Any questions about SUZIE's Immunizations?
Please call 1-800-980-9431.
¿Tiene preguntas sobre las vacunas de SUZIE?
Por favor llame al 1-800-980-9431.

Figure 4: Sample of Immunizations Due letter

1. Click on the "**Print**" icon to print the referral letter.

1.1. The date in the upper right hand corner is the date the referral letter was run.

1.2. The date listed under "**Immunizations Due as of x**", is the date ALERT uploaded the data.

1.3. The immunizations listed in this section are those Alert indicates are needed as of that date.

1.4. The "History of Immunizations Received by Series" is a summary of the vaccination history reported to Alert for this child.

1.5. The phone number at the bottom is for the Alert Help Desk, where staff are prepared to answer any questions from the child's parent or guardian.

✍ ***Notes:***

Chapter 3: Client Processes
Section 8: Other Client Processes
Lesson: Changing WIC ID Numbers - Foster Families, Custody Changes

Objectives:

Upon completion of this lesson, the user will be able to:
- successfully move a participant from an existing family to another family;
- assign a participant a new WIC ID number; and,
- return a participant to their previous family.

Oregon Policies:

♦ 510 eWIC Cardholder Requirements

Overview:

Families change constantly. Children change guardianship on a regular basis. Women may need to leave one household or join another. It is important that we are able to move participants from one household to another as needed. This lesson will cover the methods TWIST provides for moving participants from one household to another and changing participant WIC ID numbers.

While there may be many methods local agencies use to manage changes in guardianship, this lesson will focus on the two most common methods. One way for managing foster children is to make each child their own "family". This method assigns each foster child in a foster home its own unique WIC ID number. The other popular method of managing foster children is to put all foster children in a foster home into the same "family." This method uses a single family ID number for all foster children in that home. Each foster child that is moved into that home is assigned the next available participant number for that family ID.

Instruction:

To Give a Participant a New WIC ID Number

The starting point for this section is:

Client Processes ➪ Enrollment and Intake ➪ Enrollment ➪ Intake

1. **Using the "Open" icon, select and return with the participant you will be giving a new WIC ID number (e.g. moving into foster care.)**

- Because families are linked with each other via the family ID number the first thing that must happen before changing a foster child's address or guardian is to disconnect them from their current family ID.

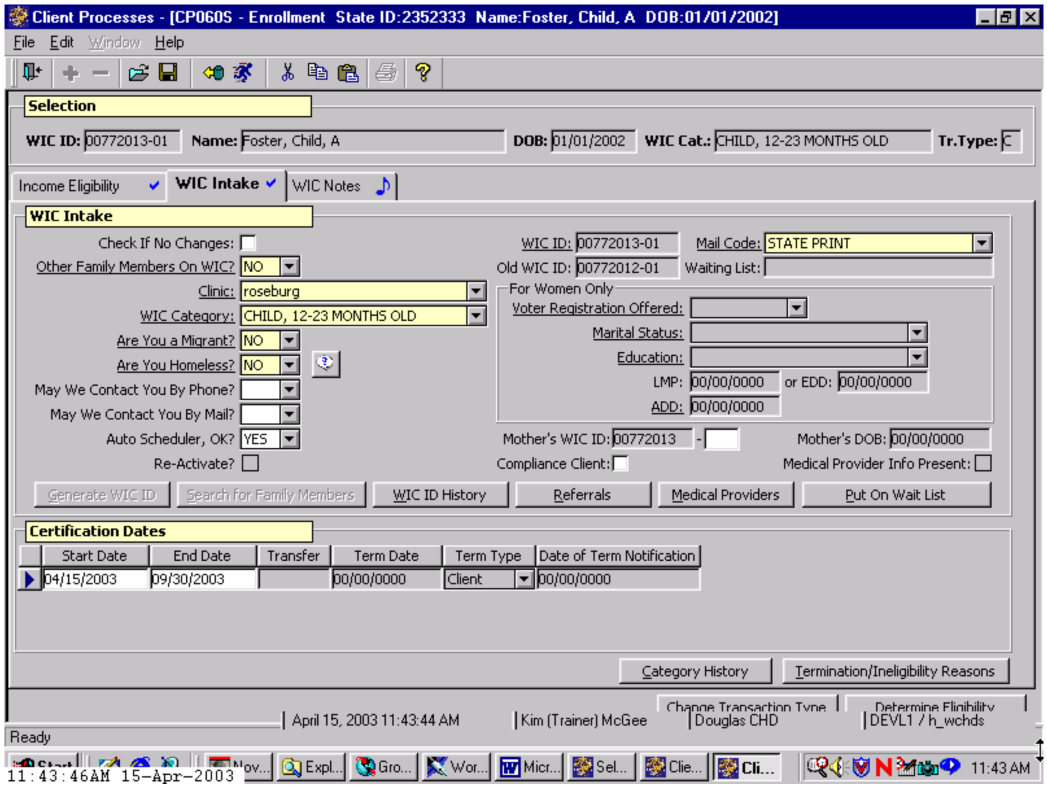


Figure 1: "WIC Intake" Screen

2. **Set the "Other Family Members on WIC" field to "No".**

   Change this field to "**Yes**" then back to "**No**" to activate the "**Generate WIC ID**" button.

3. **Click "Generate WIC ID" button.**

   - This will generate a new WIC ID number for the participant.
   - The old WIC ID number will show on the "**WIC Intake**" screen below the "**WIC ID**" field and in the "**WIC ID History**" pop-up.

4. **Change the participant's clinic if necessary and make other changes to the intake screen as needed.**

   Add a note now if desired.

5. **Save.**

6. **Fast path to client demographics.**

7. **Change address, phone, guardian name and guardian type.**

♫ NOTE: Since changing the address of one family member changes the address of other WIC family members, it is important to change the participants WIC ID number before changing addresses to avoid changing the addresses of the original family members.

8. **Save.**

9. **Check the FPA and FSS for correct benefit issuance.**

♫ NOTE: Pregnant women who have an existing record where they were assigned the "child" category in TWIST must be assigned a new WIC ID number in order to assign the "pregnant woman" category.

To Add a Child to an Existing Family

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

This is the method you would use if you want to put several different children into the same foster family.

1. **Using the "Open" icon select and return with the participant you will be moving into a new family (e.g. foster care.)**
   - Because families are linked with each other via the family ID number the first thing that must happen before changing a foster child's address or guardian is to disconnect them from their current family ID.

2. **Set the "other family members on WIC" field to "Yes".**
   - This turns on the "**Search for Family Members**" button.
   - Change this field to "**No**" then back to "**Yes**" to activate the "**Search for Family Members**" button.

3. **Click "Search for Family Members" button.**

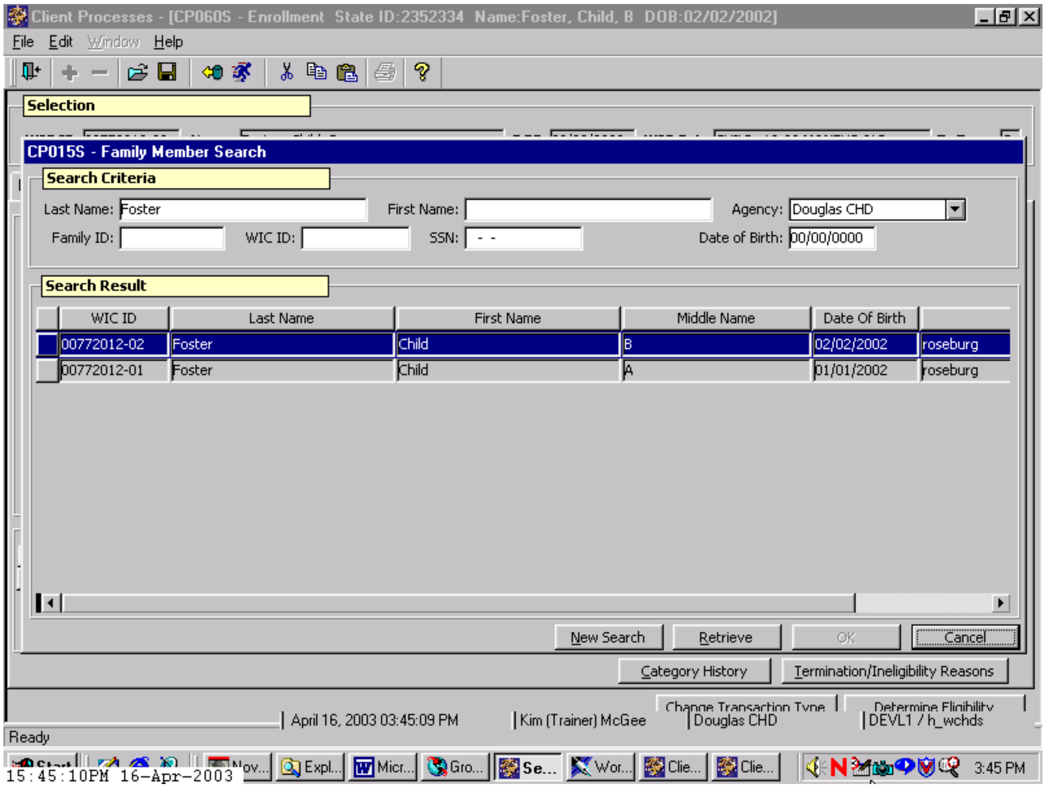


Figure 2: "Family Member Search" Screen

4. **Search for a member of the existing foster family into which you wish to add participant.**

5. **Highlight the family member and click the "OK" button.**

   - This assigns the participant the same family ID with the next available participant number.
   - The old WIC ID number will show on the "**WIC Intake**" screen below the "**WIC ID**" field and in the "**WIC ID History**" pop-up.

6. **Change the participant's clinic if necessary and make other changes to the intake screen as needed.**

7. **Save.**

8. **Fast path to client demographics.**

9. **Change address, phone, guardian name and guardian type.**

♫ NOTE: Since changing the address of one family member changes the address of other WIC family members, it is important to change the participants WIC ID number before changing addresses to avoid changing the addresses of the original family members.

10. **Save.**

11. **Check the FPA and FSS for correct benefits issuance.**

Changing a Participant to a Previous WIC ID Number

The starting point for this section is:

Client Processes ⇨ Enrollment and Intake ⇨ Enrollment ⇨ Intake

1. **Using the "open" icon select and return with the participant you will change to a previous WIC ID number.**

2. **Click on the "WIC ID History" button.**

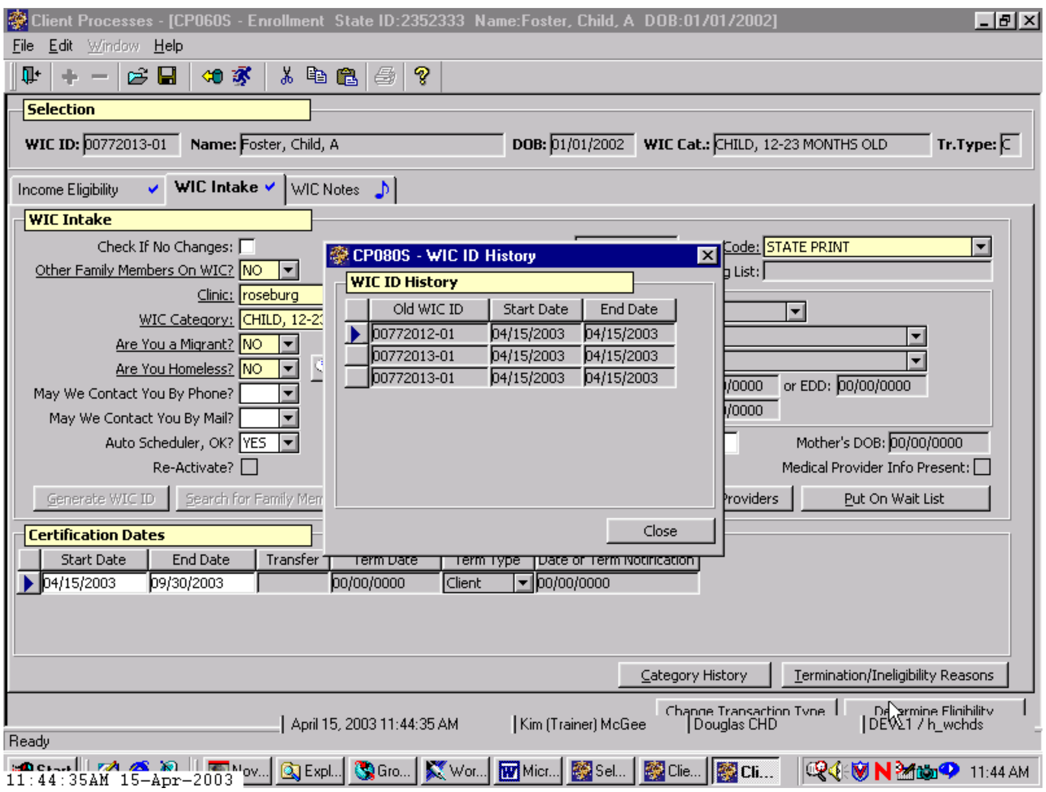


Figure 3: "WIC ID History" Pop-Up

3. **Double click on the old WIC ID number that you wish to change the participant back to.**

4. **Click "Close".**

5. **Save.**

   - After saving, the WIC ID number on the "**Intake**" Screen will show the number you selected. The "**Old WIC ID**" field will show the previous WIC ID.
   - The "**WIC ID History**" Pop-up will show the start and end dates for the WIC ID number that you just changed.
   - WIC ID numbers can be changed as many times as needed, including back and forth between two numbers and the history is kept for each change.

6. **Check the FPA and FSS for correct benefit issuance.**

✂ *Tips and Shortcuts:*

- Before you change WIC ID numbers, find out if the participant has siblings already in foster care as they may already have their own WIC ID numbers and you may wish to connect the siblings WIC ID numbers.

✍ *Notes:*

Chapter 3: Client Processes
Section 9: Second Nutrition Education Contact
Lesson 900: Individual Follow-ups

Objectives:

Upon completion of this lesson the user will be able to:
- Understand the impact of adding a risk to a client record at a follow-up visit;
- View NE information at a follow-up visit;
- Access and print diet assessment summary; and
- Explain the purpose of status and date end fields.

Oregon Policies:

♦ 625 Nutritional Risk Assessment
♦ 661 Competent Professional Authority/High Risk Counseling
♦ 820 Nutrition Education: Participant Contacts
♦ 830 Nutrition Education: Documentation

Overview:

Second nutrition education individual follow-ups function almost the same in TWIST as first nutrition education contacts. However, there are some fundamental differences in the types of contact. At the individual follow-up, the information in TWIST serves as a historical reference of previous visits and allows the user to update that information.

With TWIST, the user can update any client information, but the result of updating varies. This lesson provides information on how to update information, provide revised information to the client, and an introduction to situations that are unique to the individual follow-up.

Policy requires that you document any new medical data and topics discussed.

Instruction:

Accessing the "Last Visit Summary" Screen

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Nutrition Education Plan

1. **Retrieve the client for whom you want to view information.**

2. **Review the client's information on the "Last Visit Summary" screen.**

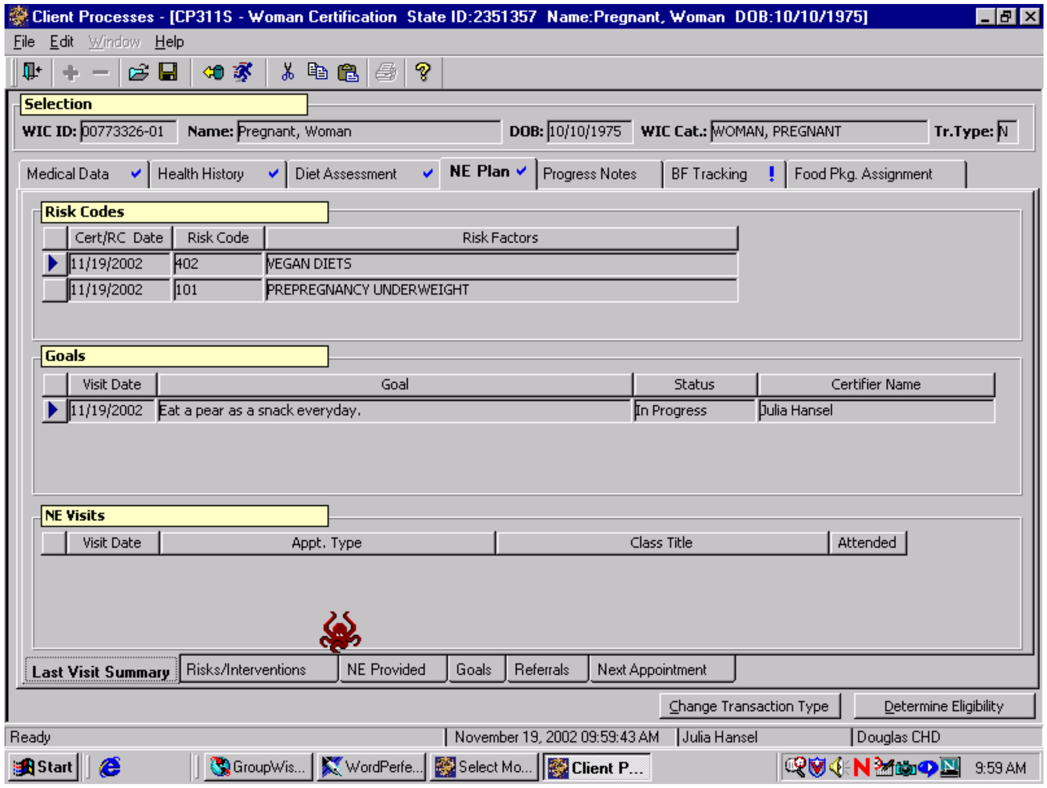


Figure 1: "Last Visit Summary" Screen

This section is populated with the client's information from the last visit but is display only.

♫ NOTE: Information may not be changed on this screen.

Adding a Risk to a Client Record at Follow-Up Visit

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Nutrition Education Plan

1. **Retrieve the client for whom you want to update information.**

2. **Click on the "Risk/Interventions" tab.**

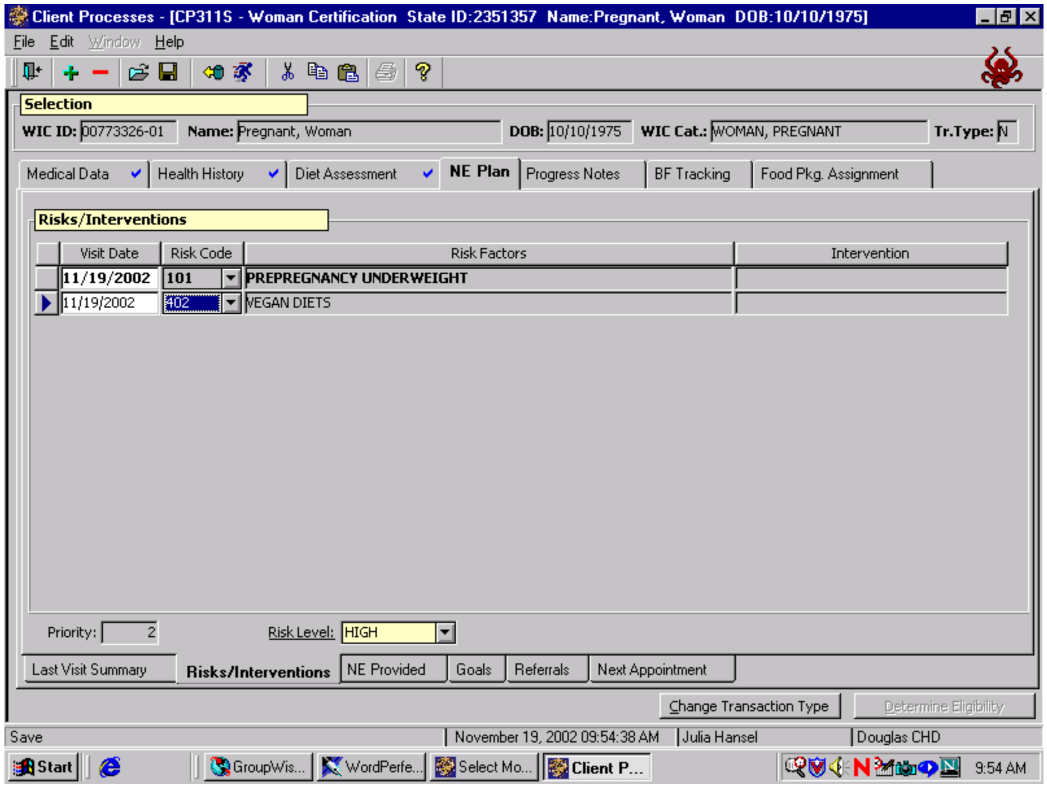


Figure 2: "Risk/Interventions" Screen

- Adding the risk is the same functionality as covered in Chapter 3, Lesson 300 *Risk Criteria and Level*.
- At follow-up visits during mid-certification, the user can add risks to a client's record. Doing this does not cause the client to lose risks.
- The only difference between adding risk(s) at the follow-up visit versus at recertification is that at the follow-up visit the certifier is not assessing risks already assigned and therefore cannot remove any risks.

♫ NOTE: You can add new information on any certification screen by clicking on the insert icon.

Viewing Nutrition Education Provided at Past Visits

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Nutrition Education Plan

1. **Retrieve the client for whom you want to view information.**

2. **Click on the "NE Provided" tab.**

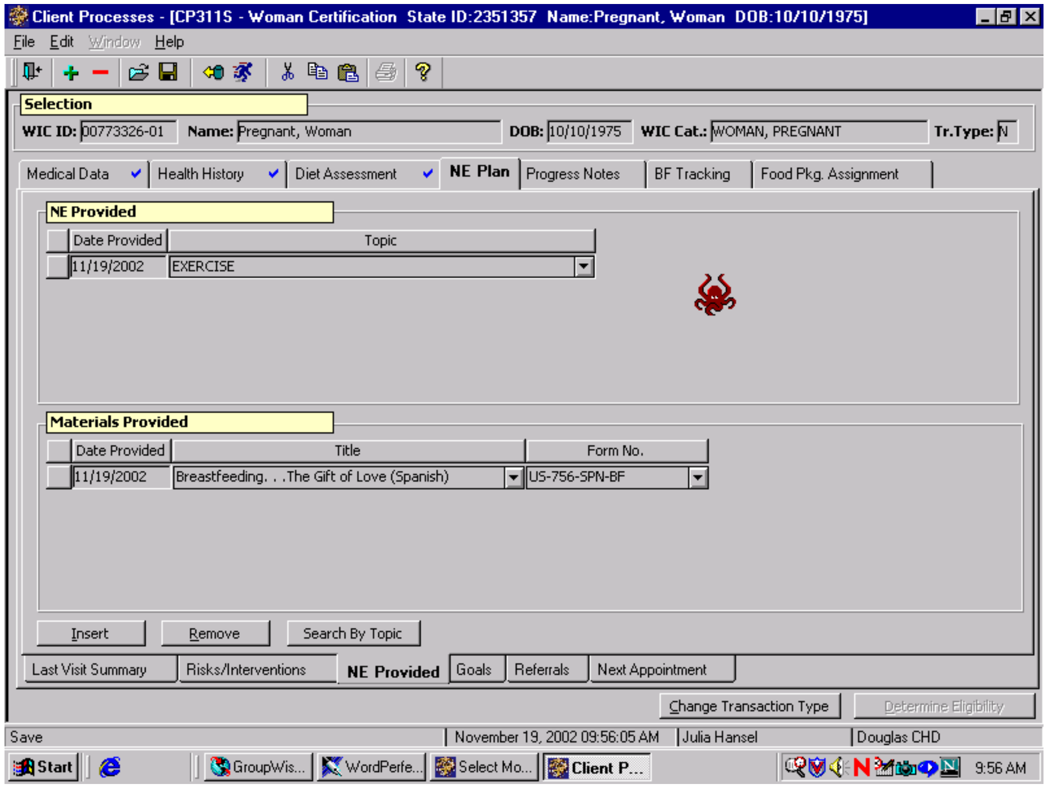


Figure 3: "NE Provided" Screen

- Here you can view nutrition education that was provided in the past.
- Refer to Chapter 3, Lesson 402 *Nutrition Education Provided* for information on how to add nutrition education provided.

Updating Client Goal Status

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Nutrition Education Plan

1. **Retrieve the client for whom you want to update the Next Steps status.**

2. **Click on the "Next Steps" tab.**

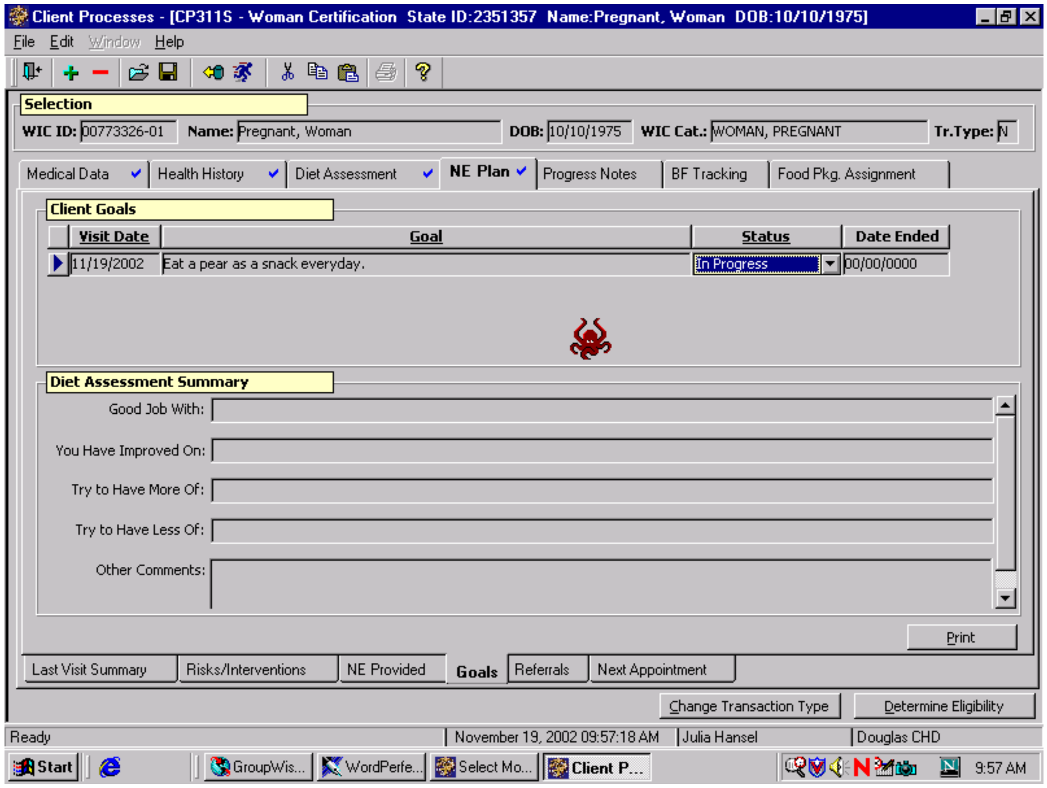


Figure 4: Next Steps Screen

3. **In the "NE Plan" section, tab to the "Next Steps" field.**

- If the client's "Next Steps" have changed since the first visit, there is a drop down menu to change the status.
- If the status is changed, the "**Date Ended**" field is auto filled with the current date. This date is modifiable.
- If the "Next Steps" status is changed to or remains as 'not ready' or 'in progress', the "**Date Ended**" field is grayed out as 00/00/0000 and is not modifiable.

➥ *Practice Activities:*

Use the client from your ☛ Activity Sheet for this practice.

The starting point for this activity is:
Client Processes ⇨ Certification ⇨ Woman ⇨ Diet Assessment

1. Retrieve the client for whom you want to update information.
2. Click on the "Risk Factors" tab.
3. Add a risk to the client's record.
4. Click on the "NE Plan" section to update the NE plan.
5. Click on the "NE Provided" tab to record the NE provided.
6. Click on the "Next Steps" tab to update the client's planned step(s).

7. Tab to the "Status" field and change the status of the client's planned step(s).
8. Save.
9. Exit.

✓ Skill Check:

Retrieve a certified client from client primary.

Your client has come in for an individual follow up appointment. She has cerebral palsy and recently was hospitalized for leg surgery. Her previous "next steps" was to increase her intake of fruits and vegetables. The assessment today shows that she is now eating 5 servings of fruits and vegetables a day.

Update her Risk Factors and "Next Steps" status. *Print each screen when completed.*

✍ Notes:

Chapter 3: Client Processes
Section 9: Second Nutrition Education Contact
Lesson 901: Documenting Non-WIC Nutrition Education

Objectives:

Upon completion of this lesson the user will be able to:
- Operate "Schedule Non-WIC NE" button;
- Identify when to use "Schedule Non-WIC NE" versus "Schedule Appointment" buttons; and
- Document nutrition education provided by an outside agency.

Oregon Policies:

- ♦ 800 Nutrition Education: Introduction and Overview
- ♦ 810 Nutrition Education: Making Education Available
- ♦ 820 Nutrition Education: Participant Contacts
- ♦ 830 Nutrition Education: Documentation
- ♦ 835 Nutrition Education: Attendance or Refusal

Overview:

Clients may receive nutrition education from non-WIC organizations. You can document and view this education in TWIST on the "Next Appointment" screen. In this lesson you will learn how to record and view non-WIC appointments.

Instruction:

Documenting Non-WIC Nutrition Education

The starting point for this section is:

Client Processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Nutrition Education Plan

1. **Click on the "Next Appointment" tab at the bottom of the screen.**

2. **Retrieve the client for whom you want to document non-WIC education.**

3. **Click the "Schedule Non-WIC NE" button in the lower right hand corner.**

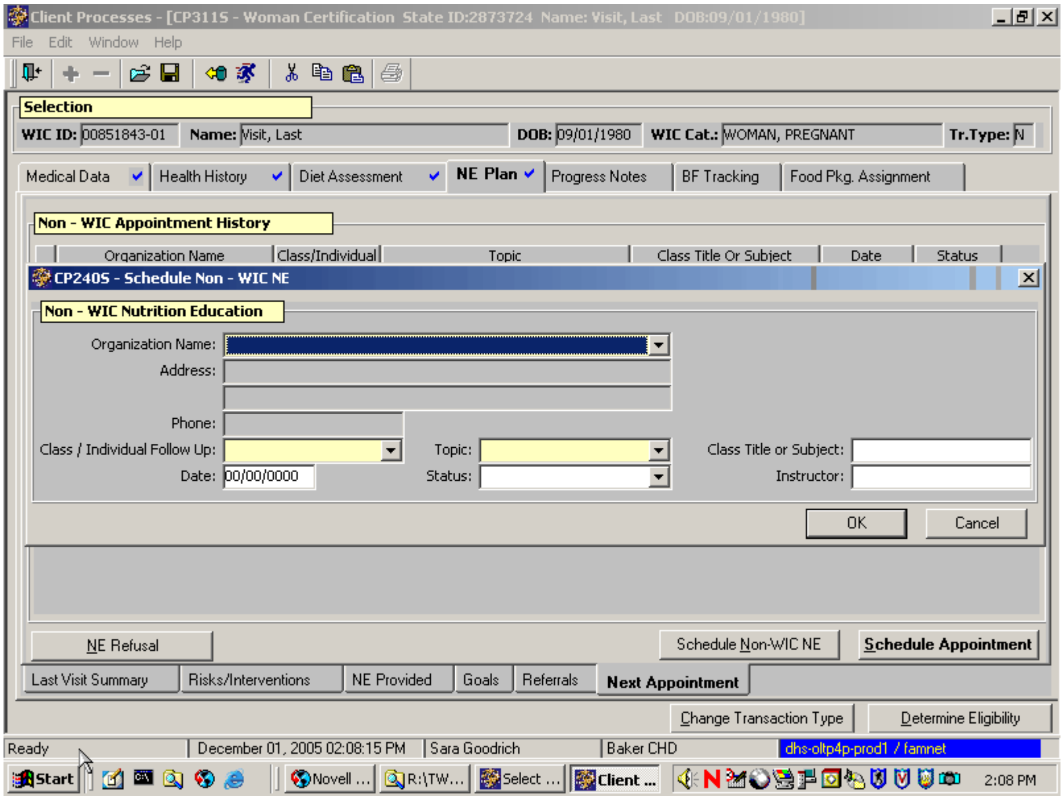


Figure 1: "Schedule Non-WIC NE" Pop-Up

4. **Complete the "Organization Name" field by selecting the appropriate organization from the drop-down list.**

   The name, address and phone number will be populated by the system from the Referral Organizations table in Operations/Management.

5. **Use the drop-down lists to complete the "Class/Individual Follow-Up" and the "Topic" fields.**

6. **Tab to the "Class Title or Subject:" field and enter the appropriate information.**

7. **Enter the date of the education in the "Date" field.**

   This date can be in the past, current, or in the future.

8. **Tab to the "Status" field and select the correct status from the drop-down list.**

9. **Enter the instructor's name in the "Instructor" field.**

10. **Click “OK” to save your work and close the pop-up, or “Cancel” to close the pop-up without saving the information.**

    The information is displayed on the “Non-WIC Appointment History” screen.

11. **Save.**

12. **Exit.**

✂ *Tips and Shortcuts:*

- If you discover that you need to change the information in the **“**Non-WIC Appointment History**”** screen, double click on the row you wish to modify. This will open the pop-up and allow you to make changes.

- A client who attends a Non-WIC nutrition education activity will need to contact the WIC clinic for benefits issuance.

➥ *Practice Activity:*

The starting point for this section is:

Client processes ⇨ Certification ⇨ Infant/Child or Woman ⇨ Nutrition Education Plan

Use the ☛ Activity Sheet to complete this activity.

1. Select the client for whom you want to document non-WIC nutrition education.
2. Click the “Schedule Non-WIC NE” button.
3. Select La Leche League as the “Organization Name.”
4. Tab to the “Class/Individual Follow-Up” field.
5. Select “Class” from the drop-down.
6. Tab to “Topic.”
7. Select a breastfeeding topic.
8. Tab to the “Class Title or Subject.”
9. Enter “Breastfeeding is great!”
10. Enter tomorrow’s date in the “Date” field.
11. Mark the “Status” as “Booked.”
12. Leave the “Instructor” field blank.
13. Click “OK” to save your work and close the pop-ups.
14. Exit back to the “Client Processes” window.

✍ Notes:

Chapter 3: Client Processes
Section 9: Second Nutrition Education Contact
Lesson Plan 902: Nutrition Education Refusal

Objectives:

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

- Appropriately document refusal of second NE contact.

Oregon Policies:

♦ 835 Nutrition Education: Attendance and Refusal

Overview:

To meet its goal of providing nutrition education, WIC requires that participants be offered a second nutrition education (NE) contact sometime during their certification period. In order to encourage participation in nutrition education activities, food benefits issuance is coordinated with WIC participant attendance at a second NE. TWIST has the flexibility to do this in several ways. Participants cannot be denied their benefits if they are unable to attend a scheduled second NE contact. When a participant is unable to attend their second NE contact, reschedule them for another NE contact within the same month. If it is not possible to reschedule them within the same month, the participant can contact the clinic for one month of benefits issuance and be rescheduled for the second NE contact the following month. The procedure for rescheduling a second NE contact is explained in Chapter 4, Lesson 501 “Reschedule an Appointment.”

A WIC participant can also refuse to attend a second NE contact. This refusal must be documented in TWIST and the participant must contact the WIC clinic the month their food benefits end to continue on the program.

Instruction:

Documenting Second NE Contact Refusal

The starting point for this section is:

Client Processes ⇨ Certification ⇨ NE Plan ⇨ Next Appointment

♫ NOTE: This process would usually be done right after you offer the participant a second NE contact during the certification visit. You can also go directly to the “Family Appointment Record” screen to document second NE refusal.

1. **Click on the "NE Refusal" button to open the "NE Refusal Pop-up."**

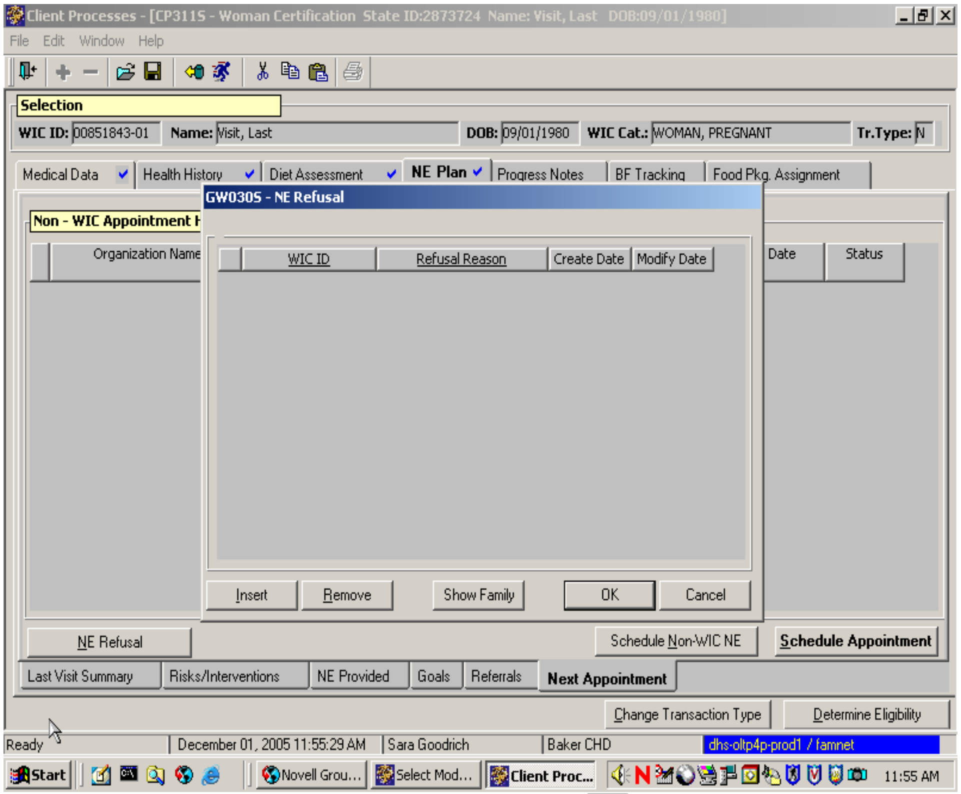


Figure 1: "NE Refusal Pop-Up"

2. **Click the "Insert" button to insert a new row on the pop-up.**

3. **Click on the "WIC ID" field and select your client's ID number.**

   - If you want to indicate a refusal for multiple family members, click on the "**Show Family**" button to display all family members.

4. **In the "Refusal Reason" field, select the appropriate reason from the drop down list.**

5. **The "Create Date" and "Modify Date" fields are system generated and display only.**

6. **Click "OK" to close the pop-up and save the information.**

7. **Click "Cancel" if you want to exit without saving.**

✂ Tips and Shortcuts:

- You can also go directly to the “Family Appointment Record” to document a second NE refusal.

➥ Practice Activity:

Use information from your ☛ Activity Sheet for this practice.

The starting point for this section is:
Client Processes ⇨ Certification ⇨ NE Plan ⇨ Next Appointment

1. Click on the “NE Refusal” button.
2. Indicate the second nutrition education contact was refused.
3. Click “OK” to close the pop-up and save the information.

✓ Skill Check:

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

During the certification visit for her child, your client indicates that she cannot attend the second nutrition education contact because of her work schedule. Take appropriate steps to document this in TWIST.

✍ Notes:

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Chapter 3: Client Processes
Section 9: Quarterly Nutrition Education Contact
Lesson: *WIC Health.org*: Online Nutrition Education

Objectives:

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

- access the "WIC Health Client Search" website to confirm which nutrition education lessons a participant has completed; and
- document completion of a *WIC Health* online nutrition education lesson in the participant's record.

Oregon Policies:

- ♦ 820 Quarterly Nutrition Education Contacts
- ♦ 840 Documentation of Nutrition-Focused Education and Counseling

Overview:

Participants who are not high risk may fulfill their quarterly nutrition education contact by completing an online lesson on the WIC Health website. Once completed, the lesson is documented in TWIST and food benefits may be issued from the "Family Summary Screen" as normal. Use the Support WIC Health website to verify the specific lesson completed and to check for any questions entered.

Instruction:

How to Verify a Participant's Lesson Completion on the Support WIC Health Website

♫NOTE: The Support WIC Health website is NOT connected to TWIST.

1. **Open an internet browser (e.g. Internet Explorer, Firefox or Edge).**

2. **Go to** https://www.wichealth.org/support

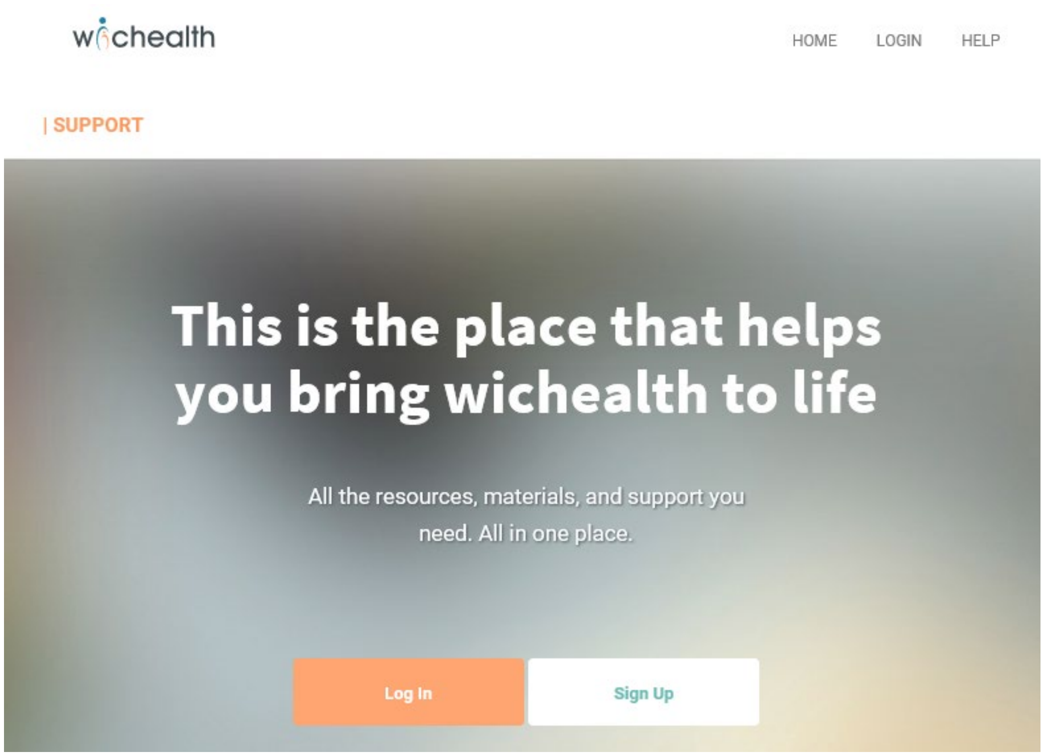
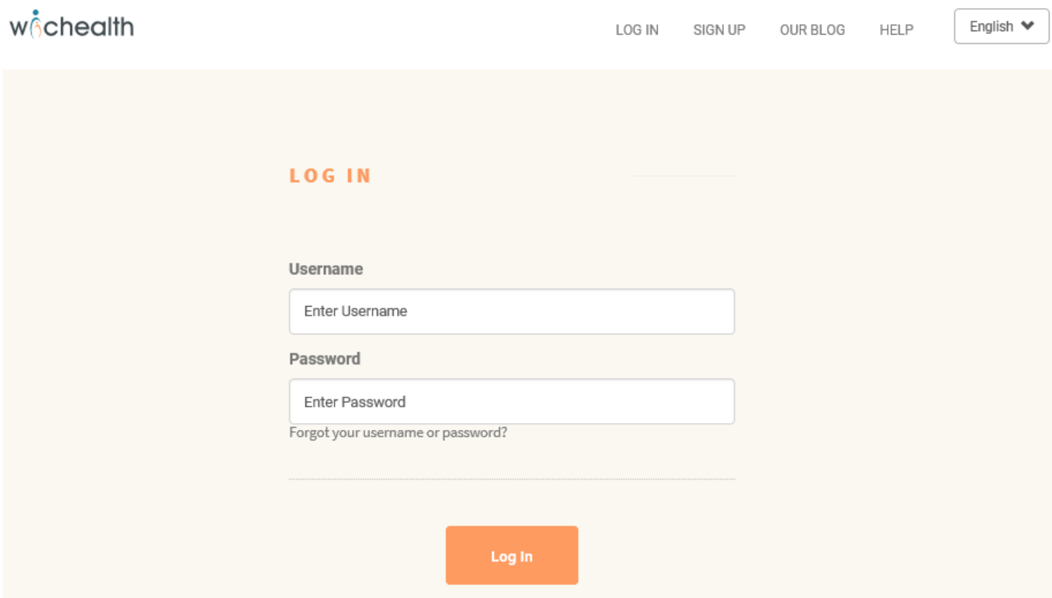


Figure 1: "Support WIC Health" Login Screen

3. **Click the "Log In" button and enter your clinic's "User Name" and "Password."**

♫ NOTE: All staff in your clinic will use the same User Name and Password to view *WIC Health*. Ask your supervisor for this information.



3. **Click on the *Client Search* box.**

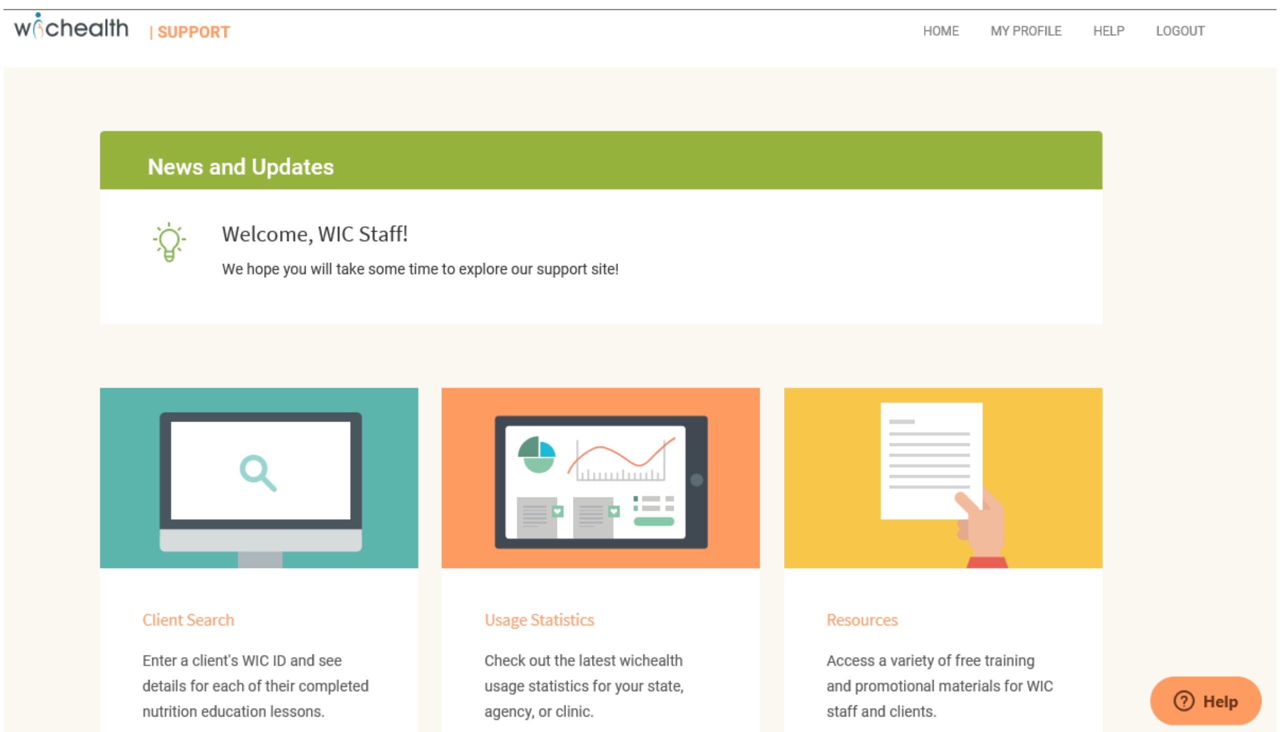
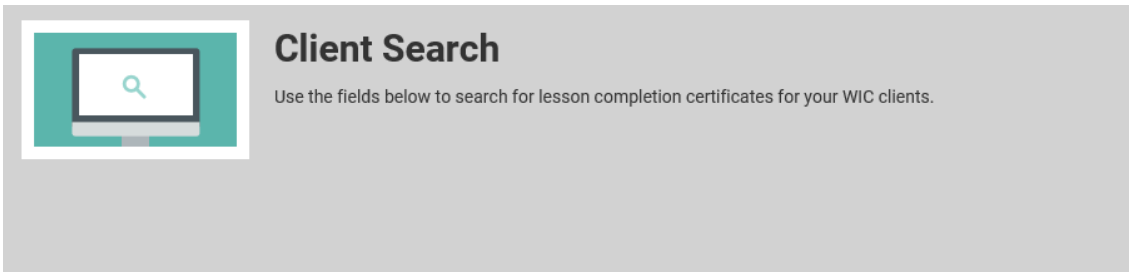


Figure 3: Support WIC Health landing page, which includes the *Client Search* feature

4. **To search for the participant,**

- Under **States**, enter ***Oregon***
- Under **WIC Agencies**, select your local agency
- Under ***Search By***, select **WIC ID** and enter the participant's **8-digit Family WIC ID number.** Leave off the 2-digit participant ID at the end, and if number is less than 8 digits, add one or more zeroes to the beginning of the number to make it an 8-digit number.



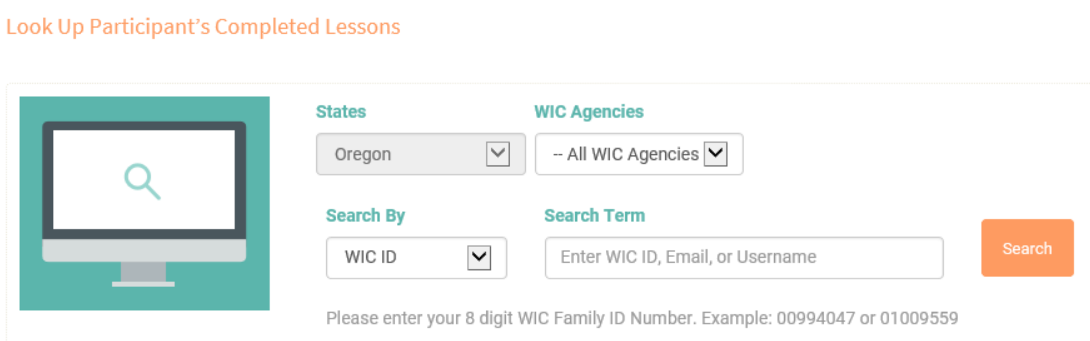


Figure 4: Client Search screen

5. **Click the "Search" button. Wait a few seconds, then scroll down to see information on the "Client Found".**

   - The screen will show the participant's name, all WIC Health lesson(s) completed and completion date(s).
   - Click on *View Certificate* (far right) to see the participant's answers to the two mandatory questions – what the participant plans to do differently as a result of the lesson, and whether there are any questions on which to follow-up – which fulfills the interactive component of the lesson.

6. Document the specific WIC Health lesson completed on the "NE Provided" tab in TWIST. Mark the online lesson as an appointment according to your agency's policy:

IF:	THEN:
Your agency uses specific TWIST groups for each online lesson topic,	Mark the participant as "show" when they have completed the lesson.
Your agency uses a generic TWIST group for all online lessons,	Mark the participant as "show" when they have completed the lesson.

♫ NOTE: For more information see the WIC Health webpage on our website:

https://www.oregon.gov/oha/PH/HealthyPeopleFamilies/wic/OnlineNutritionEducation/Pages/index.aspx

7. To search for another participant, repeat the process.

8. When finished, click "LOGOUT" on the top right of the screen.

➔ *Practice Activities:*

1. Check with your supervisor for your local agency's procedures for documenting online nutrition education lessons.

✍ *Notes:*

Chapter 3: Client Processes
Section 10: Farm Direct Nutrition Program (Farmers' Market)
Lesson: Farmers' Market Coupon Issuance

Objectives:

Upon completion of this lesson the user will be able to:
- Issue Farmers' Market coupons via a class with TWIST access;
- Issue coupons via a class without TWIST access;
- Issue coupons during an individual appointment; and
- Issue coupons to a walk-in client.

Oregon Policies:

⊄ 1100 Farm Direct Nutrition Program Local Program Responsibilities

Overview:

Local agencies can issue coupons to clients several different ways:
1) in a class setting with a TWIST connection;
2) in a class setting via laptop;
3) in a class setting where TWIST is not available (such as a satellite clinic with no lap-top or on-site at a farmers' market);
4) on an individual basis as part of an appointment; and
5) in a walk-in situation.

Regardless of the method you use, you must document coupon issuance on the Farmers' Market Issuance screen and also on a coupon register (since recipient signatures are still required).

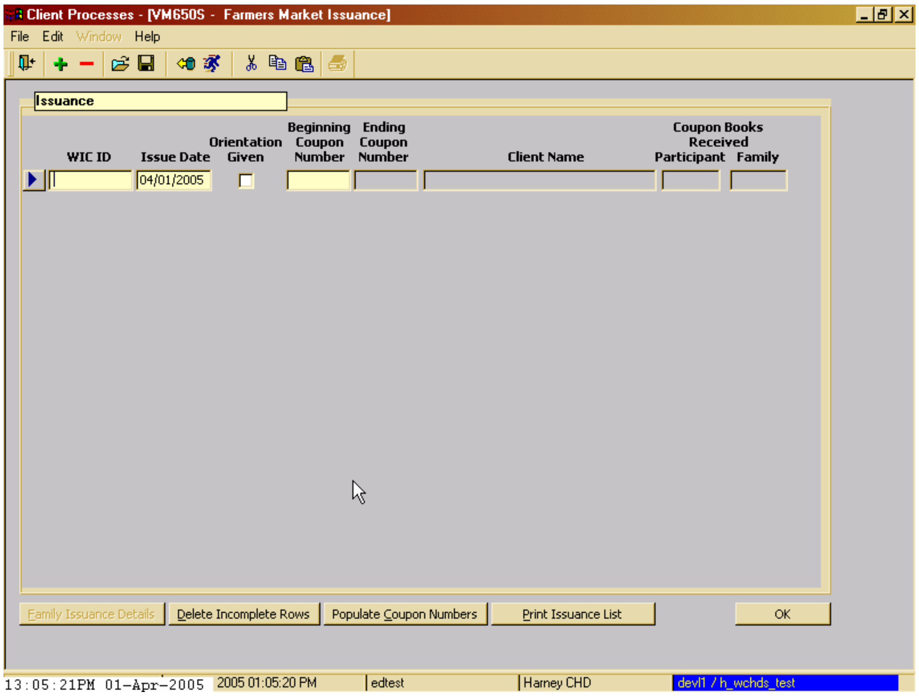


Figure 1: "Farmers' Market Issuance" Screen

The route by which you will access this screen depends on the method of issuance you choose. We will review each method in detail.

Instruction:

Issue Coupons Via a Class With a TWIST Connection

The starting point for this section is:

Appointment Scheduler ÷ Group Maintenance ÷ Group Education Classes

This method is possible only if you are issuing coupons with TWIST access.

1. **Retrieve the appropriate class.**

+ NOTE: Please refer to the "Schedule a Client into a Nutrition Education Group Appointment" lesson for more detailed information.

2. **Mark the appropriate participants as "Show."**

3. **Save.**

4. **Click on "Farmers' Market Issuance" button.**

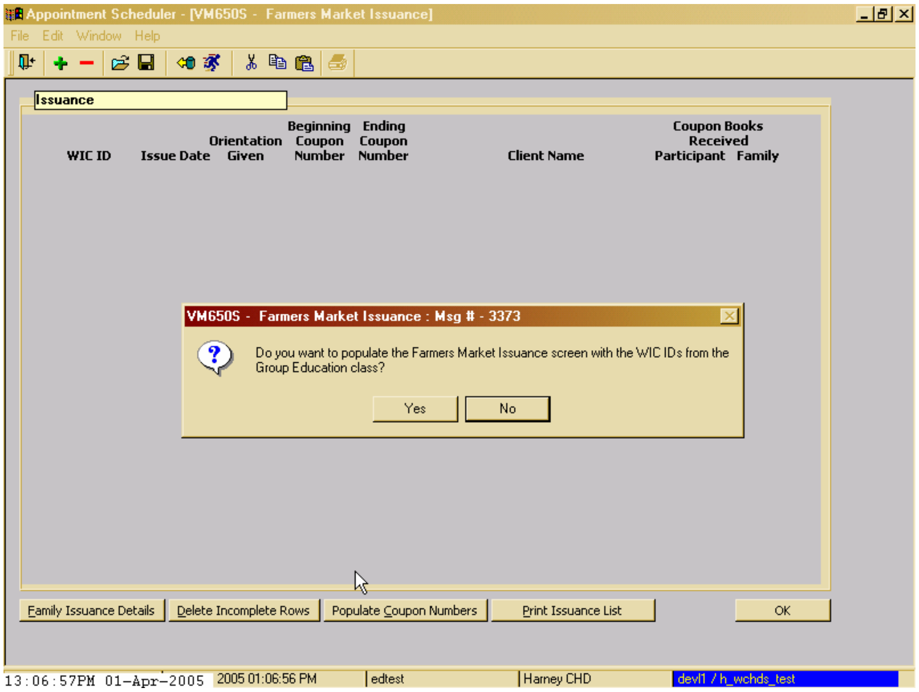


Figure 2: Populate "Farmers' Market Issuance" Message

- A message is displayed asking *"Do you want to populate the Farmers' Market Issuance screen with the WIC ID's from the Group Education Class?"*

5. **Select "Yes" and TWIST immediately begins, from the bottom of the list, to identify those participants who are ineligible to receive coupons.**

- Any clients who are not eligible for coupons will be identified, by WIC ID number and name, in a pop-up.

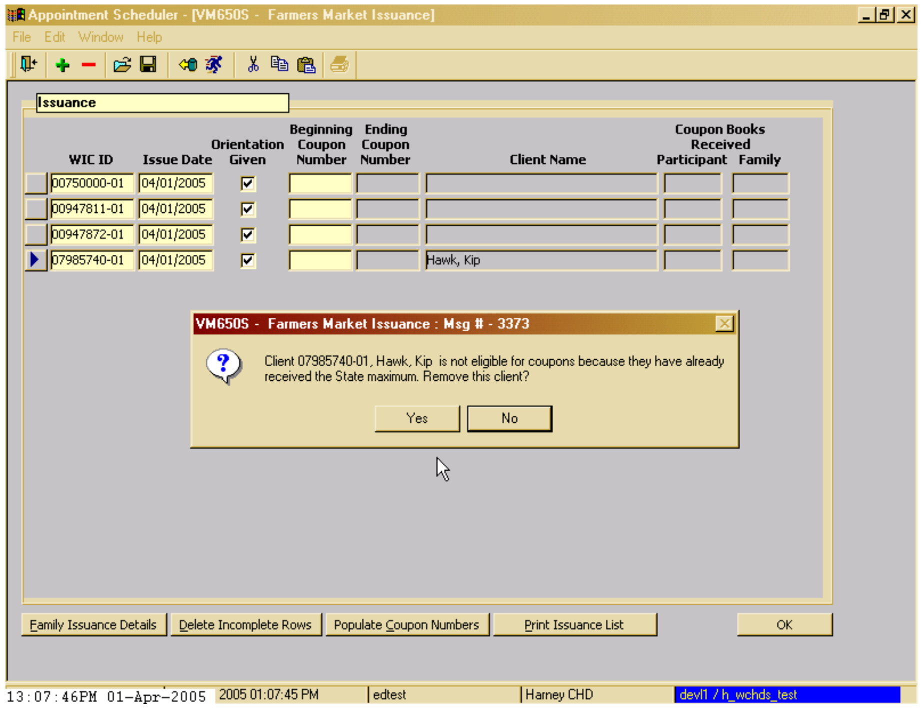


Figure 3: "Farmers' Market Issuance" Ineligibility Message

- You will have the option to remove the client or leave the client on the screen. Removing the client means not issuing coupons to the client. Since this method requires you to be working in TWIST to issue the coupons you must always reply **"Yes"** to avoid issuing coupons to an ineligible client. (We will discuss why you may not want to remove a client in the next section.)

+ NOTE: Selecting **"Yes"** removes the client from the Farmers' Market Issuance screen but NOT from the class list.

- The screen now lists, in order of participant ID, WIC clients who are marked as "Show" and are eligible for Farmers' Market coupons.

6. **If needed, remove any of the remaining eligible clients using the "minus" icon (*not* the "Delete Incomplete Rows" button – see "Tips and Shortcuts").**

- It is not mandatory to issue coupons to all eligible clients on the list.

- Make sure to remove any family members that would cause the family to exceed your agency's maximum family benefit.
- **"Issue Date"** defaults to today's date.
- **"Orientation Given"** automatically populates in this screen but may be unchecked if needed.
- **"Client Name"** also automatically populates here.
- The **"Coupon Books Received"** columns reflect previous issuance AND what you are about to issue.
- The screen should now list, in order of participant ID, all the clients to whom you want to issue Farmers' Market coupons.

7. **Click on the "Populate Coupon Numbers" button.**

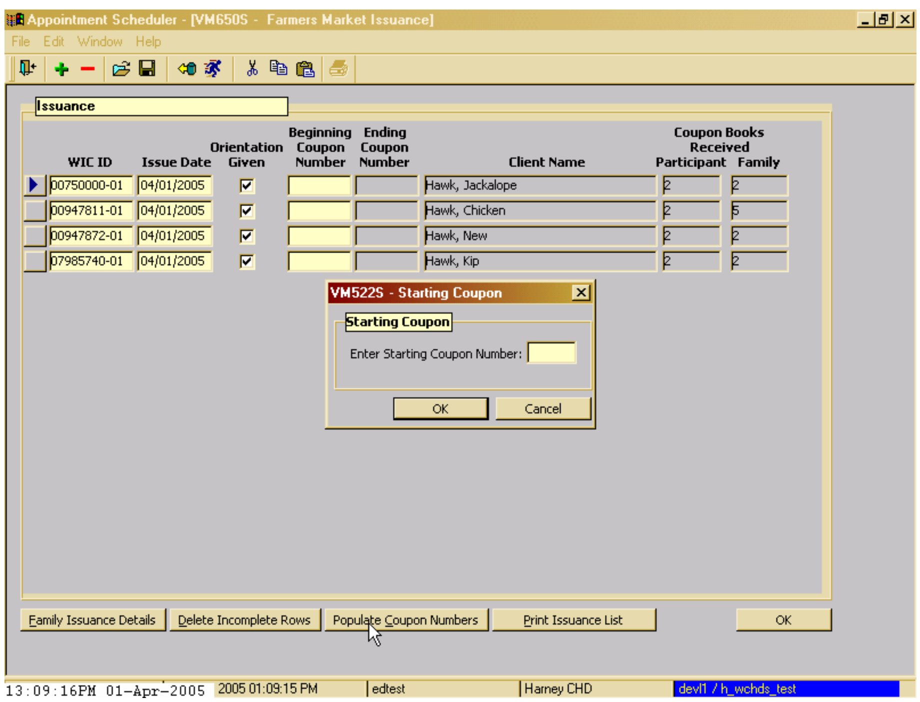


Figure 4: "Starting Coupon" Pop-up

8. **Enter in the pop-up the beginning coupon number of the first set of coupons you plan to issue for this class.**

9. **Click "OK."**

- TWIST will automatically populate the **"Beginning"** and **"Ending Coupon Numbers"** for the WIC clients on the Farmers' Market Issuance list.

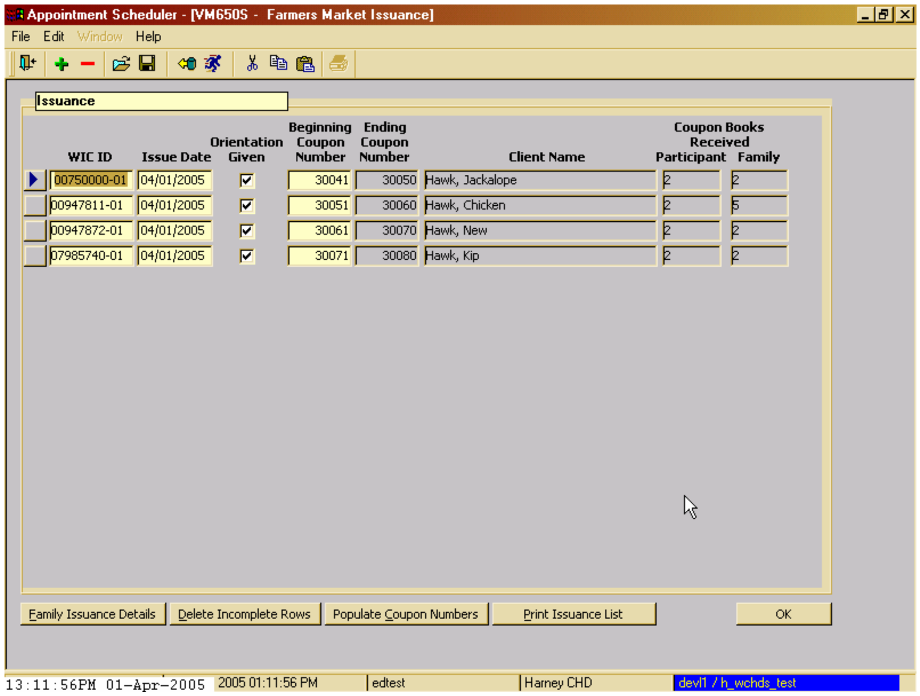


Figure 5: "Farmers' Market Issuance" Screen Completed

10. **Click on "Print Issuance List" button.**
    - TWIST will print a "Farmers' Market Issuance List" that displays the contents of the completed Farmers' Market Issuance screen with a signature line for each client.
    - Make sure a recipient signs for each set of coupons; then staple the signed list to the corresponding coupon register.

11. **Distribute coupons to clients as you normally would, according to the coupon ranges assigned by TWIST.**

12. **Click "OK."**
    - At this point you will be asked if you want to save your work.
    - If you click **"OK"** before you have printed the signature log TWIST will ask if you want to print before you exit.

+ NOTE: The "Family Issuance Details" button will be covered in another lesson.

Issue Coupons Via A Class By Laptop

The starting point for this section is:

Appointment Scheduler ÷ Group Maintenance ÷ Group Education Classes

Make sure to assign and verify stock to the laptop clinic prior to the load, and then proceed as described in the “Issue Coupons Via a Class With a TWIST Connection” section above.

Issue Coupons Via a Class Where TWIST is Not Available

The starting point for this section is:

Appointment Scheduler ÷ Group Maintenance ÷ Group Education Classes

This method allows you to document coupon issuance by coupon range from the completed coupon register. While the previous method organizes the Farmers’ Market Issuance screen by WIC ID number, this method organizes the screen by coupon range.

Without TWIST access, some preparations must be completed before the class:

1) Make sure you have assigned and verified stock to the appropriate clinic since you can only issue coupons from the assigned range;
2) Make sure you have the correct series of coupons and coupon registers;
3) Make sure you have enough FDNP materials for everyone who is eligible to receive coupons; and
4) Run the Farmers’ Market Client Eligibility Report for your class:

    1. **Retrieve the appropriate class.**

    2. **Click on “Farmers’ Market Eligibility Report” button.**

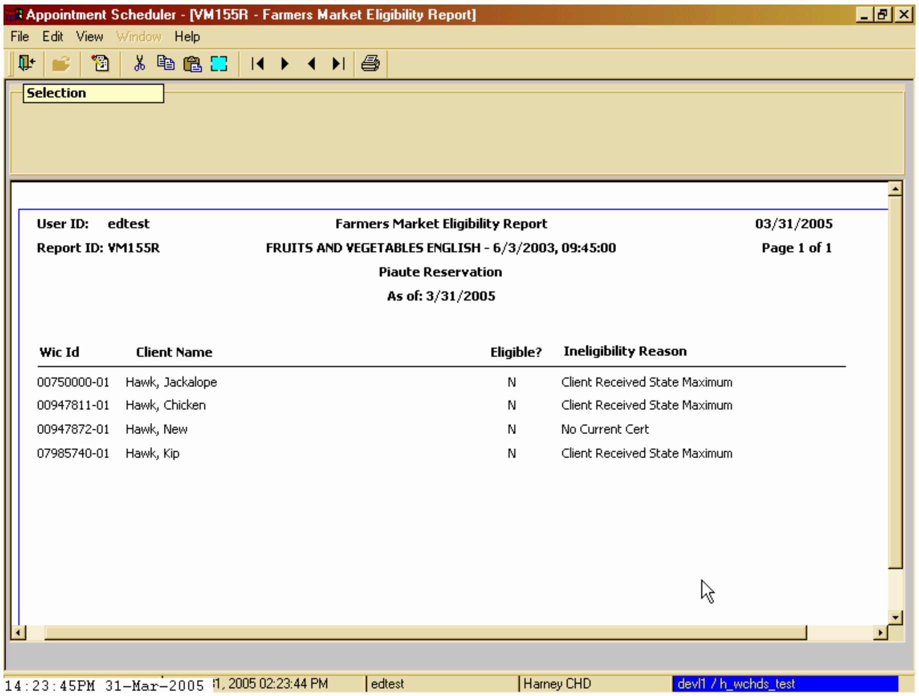


Figure 6: "Farmers' Market Eligibility Report" Screen

- TWIST will generate a report that displays the WIC clients listed for the class, whether or not they are eligible to receive coupons, and ineligibility reasons for those who are ineligible.
- Use this report to ensure that you are issuing coupons only to eligible clients.

+ NOTE: You can run this report for multiple classes:

- Click on **"Vendor Management"** icon.
- Select FM Client Eligibility Report from **"Farmers' Market"** under the Reports drop-down menu.
- Select the appropriate selection criteria. You can run the report the Group Education classes within the date range that you specify. TWIST will generate a list of the registered participants and their FM eligibility for each class in the date range you specify.

At the satellite clinic or upon return from class:

1. **Retrieve the appropriate class.**

2. **Check participants into class as you normally would.**

3. **Save.**

4. **Click on "Farmers' Market Issuance" button.**

   - A message is displayed stating *"Do you want to populate the Farmers' Market Issuance screen with the WIC ID's from the Group Education Class?"*

5. **Select "No" and this will set up the ability for you to enter WIC ID numbers directly from the completed coupon register.**

6. **Enter the WIC ID number of the first client on your coupon register for that class.**

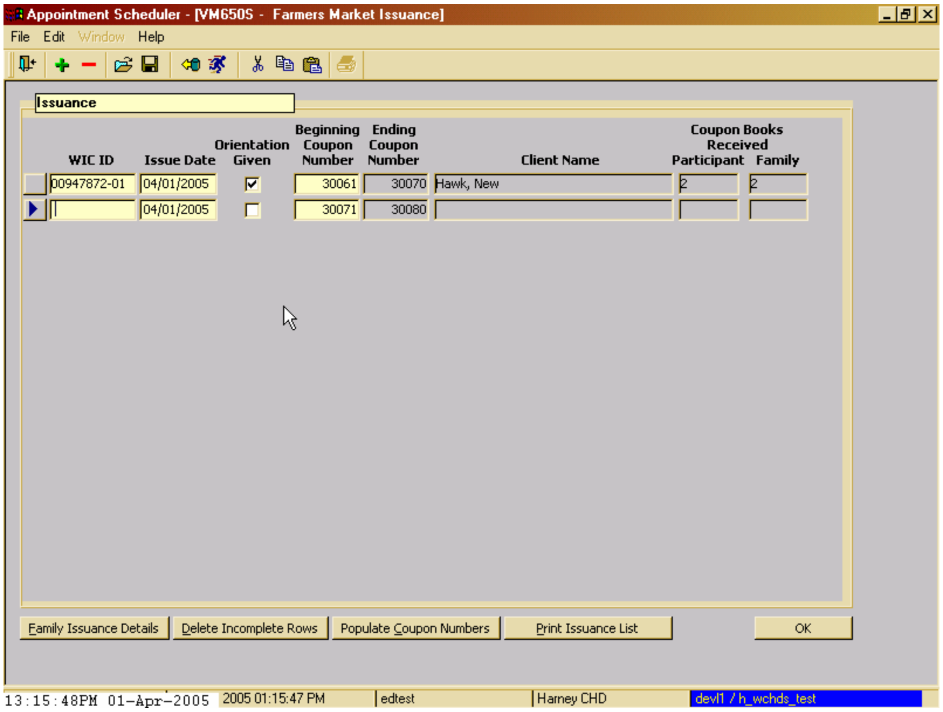


Figure 7: "Farmers' Market Issuance" Screen – Populated by Coupon Range

Once you tab to the next row, TWIST will populate the beginning coupon number for the new row. You will be required to enter only the WIC ID number of the next client.

+ NOTE: In the event that an ineligible client was issued coupons anyway, the issuance will still need to be captured in TWIST. When TWIST generates the ineligibility message that asks if you want to remove the client, you will need to click **"No"** since the issuance (albeit incorrect) must be documented.
TWIST will generate a report of WIC ID's of participants who were incorrectly issued coupons. The State will use this report as a compliance tool.

Issue Coupons Via Individual Appointment

The starting point for this section is:

Client Processes ÷ Certification OR Client Processes ÷ Enrollment

You may issue coupons to a client anytime during an individual appointment.

1. **Select "Farmers' Market" from Fast Path menu.**

   This will bring you to the Farmers' Market Issuance Screen where your client's WIC ID and name will automatically populate.

2. **Enter the Beginning Coupon Number of the range you are issuing to the client.**

3. **Click the "Orientation Given?" field once you have done so.**

4. **Click OK.**

+ NOTE: Don't forget to have the client sign the coupon register because signatures are still required!

Issue Coupons Via Walk-In

The starting point for this section is:
Client Processes ÷ Farmers' Market ÷ Issuance

There may be instances when you need to issue coupons to a client who has arrived at the clinic but is neither booked for a class nor an appointment:

1. **Enter the client's WIC ID number, or retrieve the client via Client Master.**

2. **Follow steps 2-4 of "Issue Coupons Via Individual Appointment."**

3. **Complete the coupon register fields and have the client sign the register.**

✂ Tips and Shortcuts:

- If you need to add multiple clients to the **"Farmers' Market Issuance"** screen, either insert rows using the plus sign or create a row by tabbing at the last completed field.
- Use the **"Delete Incomplete Rows"** button whenever you need to exit the Farmers' Market Issuance screen but have not completed issuing coupons to all the clients listed on the screen.
- You may use the **"Print Issuance List"** function for any of the issuance methods described, but you must remember to staple the signed list to the corresponding coupon register.

N Notes:

Chapter 3: Client Processes
Section 11: Family Summary Screen
Lesson: Family Summary Screen (FSS)

Objectives:

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

- book appointments or make requests from the Family Summary Screen;
- limit the number of months' benefits to issue by setting issuance months;
- use the FSS to coordinate appointments for a family;
- select the months food benefits are to be issued; and
- remove issued food benefits if needed.

Oregon Policies:

- ♦ 511 Food Benefit Issuance
- ♦ 646 Mid-Certification Health Assessment
- ♦ 810 Nutrition Education: Making Education Available
- ♦ 820 Nutrition Education: Participant Contacts

Overview:

Nutrition Education is a primary focus of the WIC program and food benefit issuance should support attendance at Nutrition Education appointments. Food benefit issuance means that the foods from the food package assigned to the participant are sent to the family's eWIC account and are made available to purchase with their eWIC card.

The Family Summary Screen (FSS) provides you with information for all members of a family on WIC and can be accessed from a many different areas in TWIST. This screen will allow you to review appointments and food benefit issuance on a single screen. From a single location you will be able to make appointments or appointment requests and determine which months of food benefits to issue for a family. This process ensures that family appointments are coordinated with food benefit issuance and nutrition education opportunities are maximized.

Instruction:

Accessing the Family Summary Screen

The "Family Summary" Screen can be accessed in several different ways.

From Certification:

Client Processes ⇨ Certification ⇨ Food Package Assignment Tab

- Click on the **"Family Summary Screen"** button.

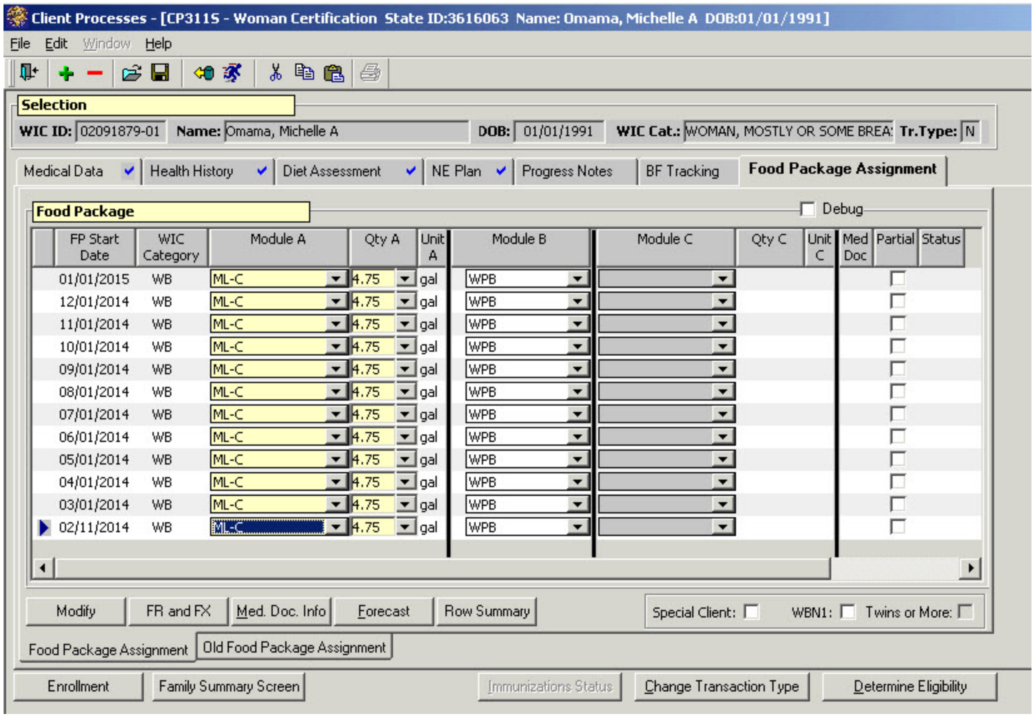


Figure 1: "Food Package Assignment" tab with Family Summary Screen button

From Lookup:

Client Processes ➪ Lookup ➪ Family Summary Screen

From Enrollment:

Client Processes ➪ Enrollment and Intake ➪ Enrollment

- Fast Path to the "**Family Summary Screen**."

From Appointment Scheduler:

Appointment Scheduler ➪ Scheduling ➪ Family Appointment Record or Daily Clinic Schedule ➪ Fast Path to the Family Summary Screen

OR

Appointment Scheduler ➪ Scheduling ➪ Group Maintenance ➪ Group Education Classes

- Use the button Fast Path from a participant scheduled in the class to their "**Family Summary Screen**."

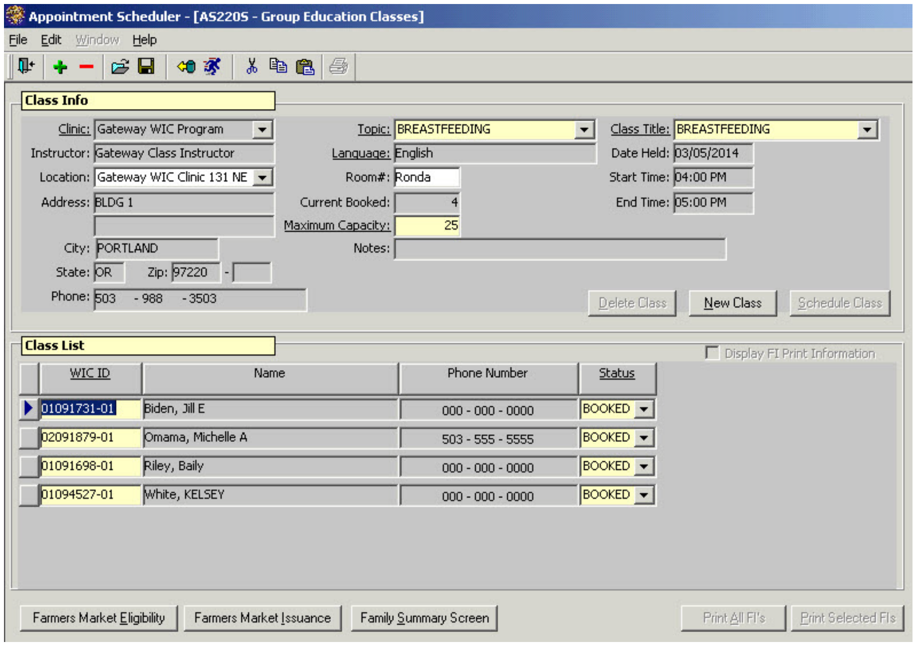


Figure 2: "Group Education" Screen with Family Summary Screen button

The "Family Summary Screen" has four major sections: Family Information; buttons for appointment scheduling and other functions; Appointments/Food Benefit Schedule; and buttons for issuing or removing food benefits and printing a Benefits List.

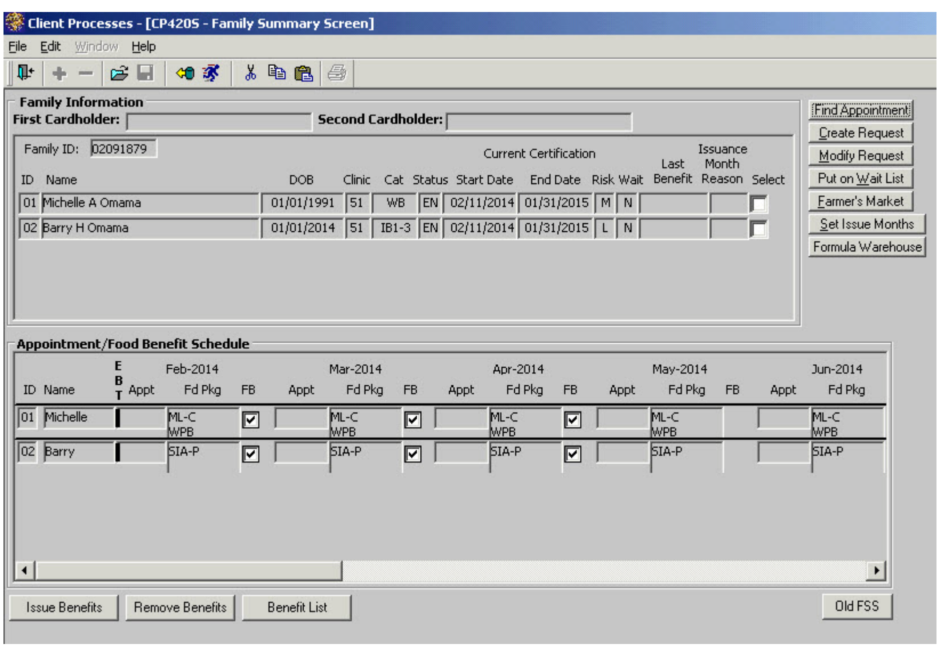


Figure 3: Family Summary Screen

Family Information Section

> ☺ **See Job Aid "Family Summary Screen Codes" for more information.**

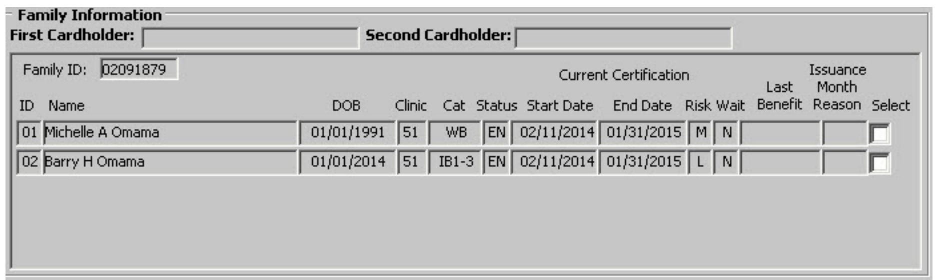


Figure 4: "Family Information" Section

This section of the screen displays all family members with WIC records and provides information that does not need to be displayed on a month-by-month basis.

1. **"Family Information" section fields.**

   1.1 "**First Cardholder**" and "**Second Cardholder**" fields indicate the names of cardholders entered on the "**Family Cardholder Screen.**" This lets you make sure the family has a cardholder assigned before they leave the clinic.

   1.2 "**Family ID**" field

   1.3 "**Client ID**" field

   1.4 "**Client Name**" field

   1.5 "**DOB**" field is the participants' date of birth

   1.6 "**Clinic**" field indicates what clinic in your agency the participant is assigned to

   1.7 "**Cat**" field indicates the participant's WIC category
   - An asterisk "*" indicates if the WBN or IBN flag has been set on the "**Food Package Assignment**" screen.

1.8 "**Status**" field indicates the status of the current certification period: EN = Enrolled; IC = Incomplete Certification; and TM = Terminated. If the field is blank, there is no current cert period for the participant.

1.9 "**Start Date**" field indicates the start date for the current certification period.

1.10 "**End Date**" field indicates the end date for the current certification period.

1.11 "**Risk**" field indicates the risk level for that participant.

1.12 "**Wait**" field is a Yes(Y)/No(N) field indicating if the participant is currently on a waiting list in your agency.

1.13 "**Last Benefit**" field indicates the issue date for the month of benefits that is the furthest in the future

1.14 "**Issue Month Reason**" field shows the reason code indicating why the participant has less than three months of food benefits available to issue.

1.15 "**Select**" checkbox is used to select the participant for whom an action is to be taken, such as "Find Appointment."

Button Functionality

On the right side of the "**Family Summary Screen**" is a series of buttons that allow the user to perform functions for participants without having to go to another screen.

Figure 5: Button Function Section

1. **Select the participant(s) for whom you want to perform the function by checking a "Select" box.**

2. **Click on the button showing the function you wish to use.**

   2.1 "**Find Appointment**" button will open the "**Find Appointment**" pop-up and allows you to schedule an appointment for the participant(s) selected. See Chapter 4, Lesson 402, *Schedule Appointment Now* for more information.

   2.2 "**Create Request**" button will open the "**Create Request**" pop-up and allows you to schedule a request for the participant(s) selected. See Chapter 4, Lesson 301, *Appointment Requests* for more information.

   2.3 "**Modify Request**" button will open the "**Modify Request**" pop-up and allows you to remove or make changes to an existing request for the participant selected. See Chapter 4, Lesson 301, *Appointment Requests* for more information.

   2.4 "**Put on Wait List**" button will open the "**Put on Wait List**" pop-up and allows you place the participant selected on the wait list. See Chapter 4, Lesson 800, *Wait List* for more information.

   2.5 "**Farmer's Market**" button will take you to the "**Farmer's Market Issuance**" screen and allow you to issue Farmer's Market Coupons for the participant(s) selected. See Chapter 3, Lesson 1000, *Farmers' Market Coupon Issuance* for more information.

   2.6 "**Set Issue Months**" button opens the "**Set Issue Months**" pop-up which allows you to limit the number of months the system will allow to be issued for the participant selected. See the "*Selecting Food Benefits to Issue*" section of this lesson for more information.

   2.7 "**Formula Warehouse**" button opens the "**Formula Warehouse**" pop-up which allows you to submit formula orders to the formula warehouse to be filled. An **"!"** on the "**Formula Warehouse**" button indicates that a formula warehouse order has been placed. See Chapter 3, Lesson 505, *Formula Warehouse* for more information.

♫ NOTE: These buttons will help the user to coordinate appointments and other participant services needed for all family members on WIC. See the *"Appointment/Food Benefit Schedule*" section of this lesson for more information.

3. **View Breast Pump Issuance information below the buttons**.

Figure 6: Breast Pump Issuance Information

♫ NOTE: This information is only visible if a Lactina or Pump-In-Style breast pump has been issued to the participant. It includes the WIC ID of the family member who was issued the breast pump. If a Lactina is issued, the date the breast pump is due to be returned is also displayed. See Chapter 3, Lesson 600, *Breastfeeding Tracking* for more information.

Appointment/Food Benefit Schedule Section

The bottom section of the "**Family Summary Screen**" shows the appointments, milk, food or formula modules that have been assigned, and availability to issue food benefits for all participants on WIC. This section allows the user to ensure participation in the appropriate Nutrition Education for the family and will be the primary method of determining which food benefits will be issued for the family.

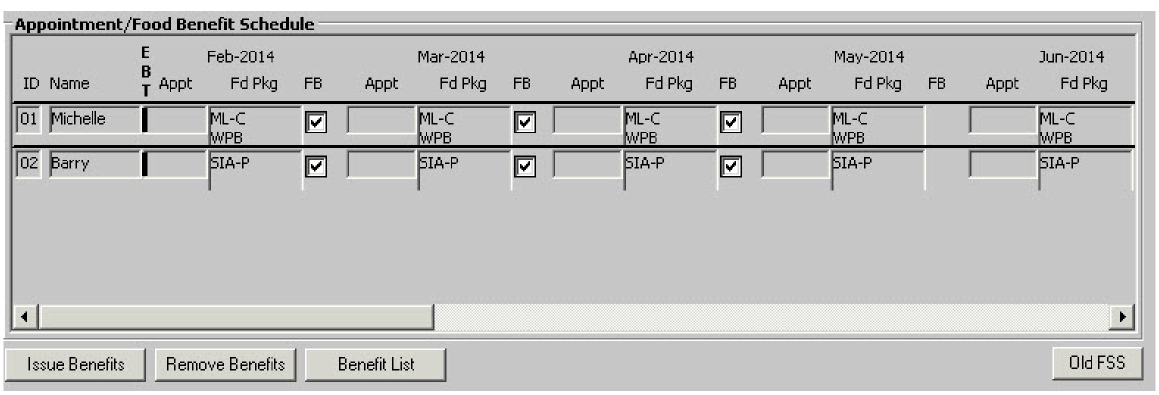


Figure 7: "Appointment/Food Benefit Schedule" Section

1. **Review the fields in the "Appointment/Food Benefit Schedule" section of the screen.**

   1.1 "**ID**" field shows the participant ID for each family member.

   1.2 "**Name**" field shows the first name for each family member.

1.3 "**Month-Year**" indicator shows the month and year of the appointment and food package directly below it. Using the scroll bar beneath will show up to a full year for each participant.

1.4 "**Appt**" field shows the code for the appointment type of the first appointment or request in the month indicated. Requests are indicated by a small " –r " after the appointment type code. For more information about the participants appointments or to reschedule, Fast Path to the "**Family Appointment Record**."

> ☺ **See Job Aid "Appointment Types" for more information.**

1.5 "**Fd Pkg**" field indicates what milk, food or formula modules have been assigned for the month indicated. Food package assignment must take place on the "**Food Package Assignment**" screen.

1.6 "**FB**" field shows the status and availability for issuing the food benefits indicated for that month.

1.7 The space between months may show the Certification End or Termination. No food packages will show beyond this bar.

-  A solid black bar shows when a participant becomes categorically ineligible.
-  A hollow bar shows when the participant's current certification period ends.

Selecting Food Benefits to Issue

The "**Family Summary Screen**" allows you to select the months of food benefits to issue for each family member eligible to receive benefits. This process would be used to coordinate food benefit issuance with participant appointments. The system defaults to 3 months of food benefits available to issue. The system will automatically limit the number of months available to issue for participants with eligibility pending, requiring medical documentation from a health professional, or if a breastfeeding mom and baby have mismatched categories. The user can limit the number of months available to issue via the "**Set Issue Months**" function.

If there is no Food Package code in the "**Fd Pkg**" field, there cannot be any food benefits issued for that month. Any food benefits that are available to be issued for a participant will default to a checked box in the "**FB**" field.

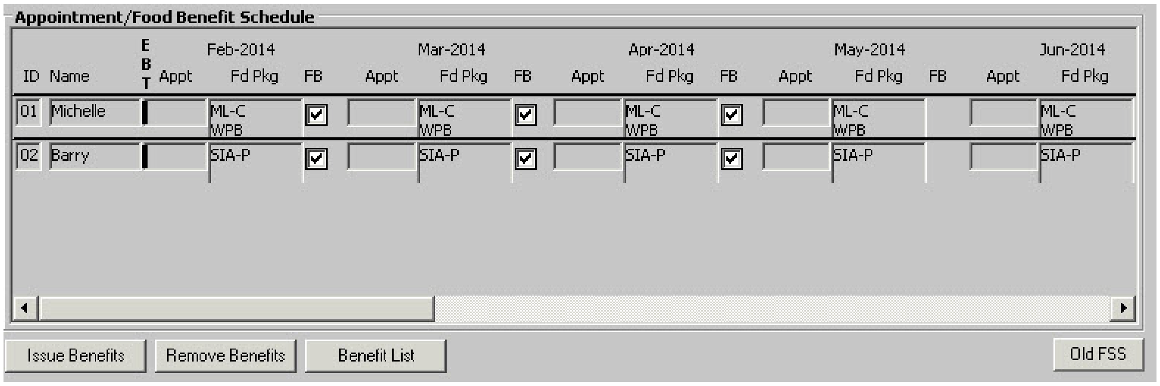


Figure 8: Checked FB boxes

1. **To limit the number of months to issue, clicking on the box will uncheck the box in the "FB" field.**

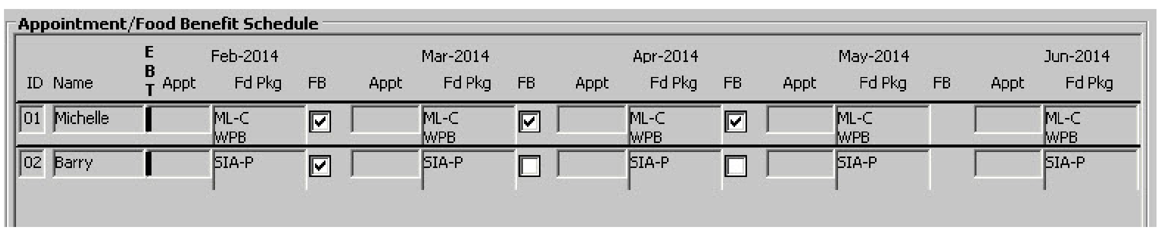


Figure 9: Unchecked FB boxes

2. **Codes in the "FB" field will give the reason checked FB boxes are not available.**

- R = Medical Documentation required
- E = Eligibility Pending
- BI = Benefits have been issued
- M = Mismatched category or designation between mom and baby

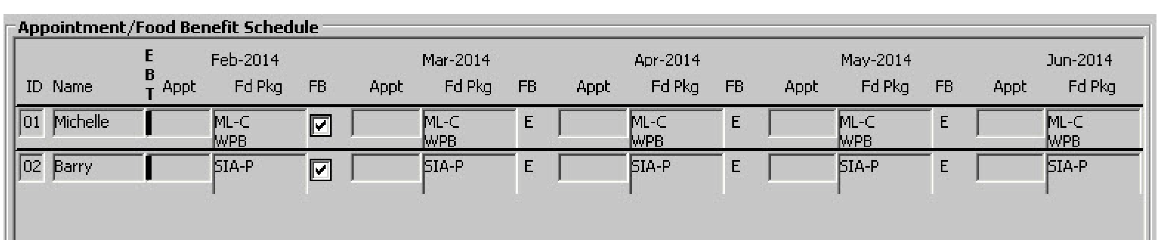


Figure 10: Codes in the "FB" field

Set Issue Months

3. **Select a participant and then click the "Set Issue Months" button.**

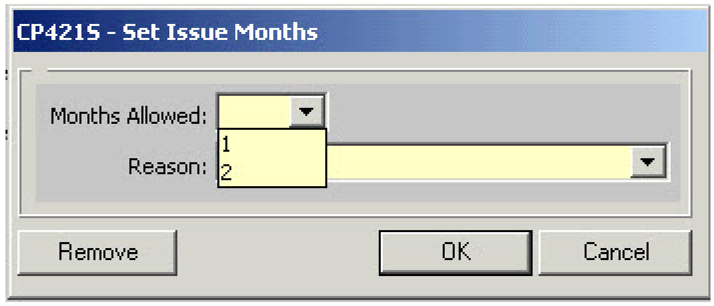


Figure 11: "Set Issue Months" pop-up

♫ NOTE: Setting the issue months will limit the months of food benefits available to issue for that participant anytime the participant is accessed on the "**Family Summary Screen**". The issue months reason must be removed to return to the default of 3 months of food benefits available to issue.

4. **Select the number of "Months Allowed" from the drop down.**

5. **Select the "Reason" from the drop down.**

6. **Click "OK."**

Removing Issue Months

7. **After selecting a participant and opening the "Set Issue Months" pop-up, click the "Remove" button.**

Coordinating Family Appointments

There are several ways appointments and issuing food benefits can be coordinated.

Changing Certification End Dates

Participants in certain categories may have their cert end dates modified so that recert appointments coincide with other appointments.

1. **Select the participant whose certification dates you wish to change**.

2. **Fast Path from the "Family Summary Screen" to "Enrollment"**.

3. **Change the "Cert End Date" field**.

3.1 Open the "**Food Package Assignment**" screen to save the changes to the food package for a shortened certification or to add a food package assignment month for a lengthened certification.

4. **Return to the Family Summary Screen**.

Food Benefit Issuance

Participants in the same family may have different number of months worth of food benefits available to issue. Uncheck the FB check boxes for months after the next scheduled appointment as needed to ensure the participant attends their next scheduled appointment.

Coordinating Appointment Requests

Appointment requests for 2nd Nutrition Education appointments or mid-cert health assessments may be modified to occur in the same months for all family members.

1. **Select the participant whose appointment requests are to be modified**.

2. **Click the "Modify Request" button**.

3. **Make the necessary changes to the request**.

4. **Click "OK."**

Benefit Issuance Functions

Figure 12: Food Benefit Issuance Buttons

1. **Click the "Issue Benefits" button to issue food benefits with boxes checked.**

♫ NOTE: Food benefits are sent directly to the eWIC banking contractor when this button is clicked. This process may take a few seconds. During the wait, you will see a message near the buttons that reads "Issuing benefits. Please wait." Once food benefits are issued, the check box is replaced with "BI".

2. **Click the "Benefits List" button to go to the "Benefits List".**

♫ NOTE: Go to Chapter 3, Lesson 1101, *Benefits List* for more information on the Benefits List.

Remove Benefits Function

This function would be used to remove the participant's issued food benefits from the family's eWIC account. Removing the benefits does not affect food package assignment. You do not need to remove issued benefits in order to change the food package assignment. Once removed, the FB check box will return and the food benefits can be re-issued at any time.

1. **Click the "Remove Benefits" button to open the "Remove Benefits" pop-up.**

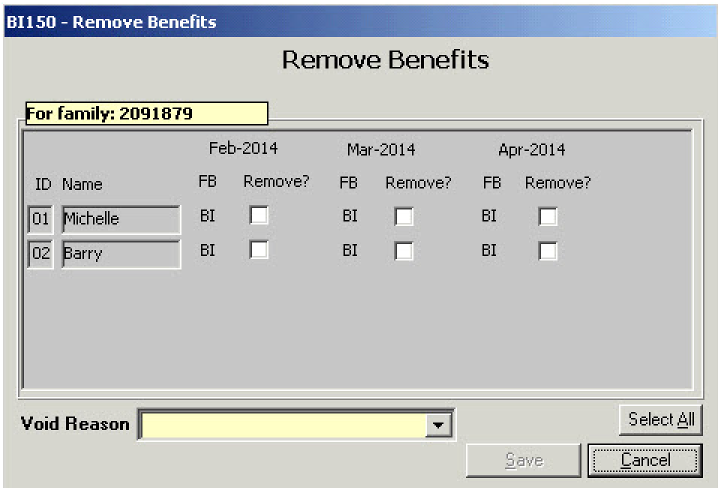


Figure 13: "Remove Benefits" pop-up

2. **Review the fields on the "Remove Benefits" pop-up.**

   2.1 "**For Family**" field indicates the family ID number / eWIC account number for the family.

   2.2 "**ID**" field shows the participant ID for each family member.

   2.3 "**Name**" field shows the first name for each family member.

   2.4 "**Month-Year**" indicator shows the month and year the food benefits directly below it were issued.

2.5 "**Remove?**" field shows a check box for each month of issued food benefits that are eligible to be removed.

♫ NOTE: Issued food benefits cannot be removed if any portion has been spent. You will not be able to remove benefits for family members receiving a common category of food if any of that common category of food has been spent.

♫ NOTE: If benefits are not available to be removed there will be no FB code and the check box will be grayed out.

Figure 14: "Remove Benefits" pop-up with grayed out check boxes

3. **Select the check box for the months of food benefits that you want to remove.**

   3.1 Clicking the "**Select All**" button will check all available food benefit check boxes for removal.

4. **Select the reason you are removing the benefits from the "Void Reason" drop down.**

5. **Click "Save" to remove the selected food benefits or click "Cancel" to close the pop-up without removing any food benefits.**

✂ *Tips and Shortcuts:*

☺ **See Job Aid "Family Summary Screen Codes" for more information.**

- There are Fast Paths to the FSS from many different participant screens. Fast Paths from the FSS are:
  - Certification, Infant/Child
  - Certification, Temp Newborn
  - Certification, Woman
  - Client Master Demographics
  - Complaints
  - Daily Clinic Schedule
  - Enrollment
  - Family Appointments
  - View Client Status

- If a participant has both requests and appointments for one month, the system will display the first non-GE appointment for the month.

- There is no "Save" functionality on the FSS except for actions taken using one of the buttons. Removing a check in the "FB" field will not be saved when you leave the screen.

✍ Notes

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Chapter 3: Client Processes
Section 11: Family Summary Screen
Lesson: Benefits List

Objectives:

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

- print a current Benefits List; and
- describe what benefits are shown on the list.

Oregon Policies:

- ♦ 769 WIC Food Packages, Appendix C

Other Resources:

Staff Training: Food Package Module

Overview:

After a participant is issued a food package, the Benefits List can be used to show the participant which foods are available to purchase. Benefits for all family members are grouped together. The Benefits List shows up to three months of benefits. This is the best way for the family to see future month benefits.

Instruction:

Understanding the Benefits List

WIC Benefits List
Benefits Available as of 07/07/2015 14:25

WIC Family ID: 753146

First Cardholder: No Cardholder Second Cardholder:

Benefits for: 7/7/2015 through 7/31/2015
Family Member/s: Bates, Sophie A - WP
Bates, Brittany A - C1

Quantity	Unit	Food Item Description
2	LB	Cheese
1	DOZ	Eggs - large
72	OZ	Cereal - hot / cold
2	CTR	Peanut butter / dry beans / peas / lentils
1	CTR	Dry beans, peas or lentils
48	OZ	100% Whole wheat bread/corn tortillas/brown rice
18	$$$	Fruit and vegetables - fresh / frozen
36	BTL	PediaSure
3.25	GAL	Whole milk
3.5	GAL	Lowfat or fat free milk
3	CTR	11.5 to 12 ounce frozen juice
2	CTR	64oz bottle / 16oz frozen juice

Figure 1: Benefits List

WIC Benefits List: All family members' benefits will be joined together on this list.

Benefits Available as of (date and time): Shows the date and time the list was printed and the benefits available to the family at that time. Remember that these benefit amounts will change as the family makes purchases.

WIC Family ID: The WIC Family ID number. The zeros in the beginning of the number do not display.

First Cardholder: The primary person authorized to use the benefits.

Second Cardholder: The secondary person authorized to use the benefits.

Benefits for: Date range for the following group of benefits. Benefits are arranged by month, with the most recent month first.

Family Member/s: Family members (and their category) who were issued benefits for this month.

Quantity/Unit/Food Item Description: The quantity of food/formula remaining available to purchase.

Your next appointment….: Your clinic can use this to write in the family's next appointment time.

> ☺ **See Job Aid "Helping Families Use the Benefits List."**

Printing a Benefits List

There are two ways to print a Benefits List.

- During certification, it is easiest to print a Benefits List from the "Family Summary" screen after issuing benefits.
- At other times, a Benefits List can be printed as an "output."

The starting point for this lesson is:

Client Processes ⇨ Certification ⇨ Woman or Infant/Child ⇨ Family Summary Screen

1. **Click on the "Open" icon and retrieve the woman or child for whom you want to print a Benefits List.**
2. **Click the "Benefits List" button on the bottom of the "Family Summary" screen.**
    - The "Family Benefits List" pop-up will open.
3. **To change to Spanish, select the radio button.**
4. **To print the Benefits List, click the "Print" button.**
5. **Click "Close" to close the pop-up.**

Other Ways to See Current Benefits Available

There are five other ways a family can see their current benefits available to make purchases.

- Bottom of grocery store receipt
- Balance inquiry at the store
- Phone
- Website
- WICShopper smartphone app

See the *Introduction to WIC* module and shopper education materials for more information.

✂ Tips and Shortcuts:

Remember the Benefits List is updated automatically by TWIST as benefits are issued and spent. The printed Benefits List is only a picture of the benefits available at that specific date and time.

✍ Notes:

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 Family Members**: To select a family member before using fast path.
- **Cardholder & Card Action buttons**: To replace cards or cardholders.

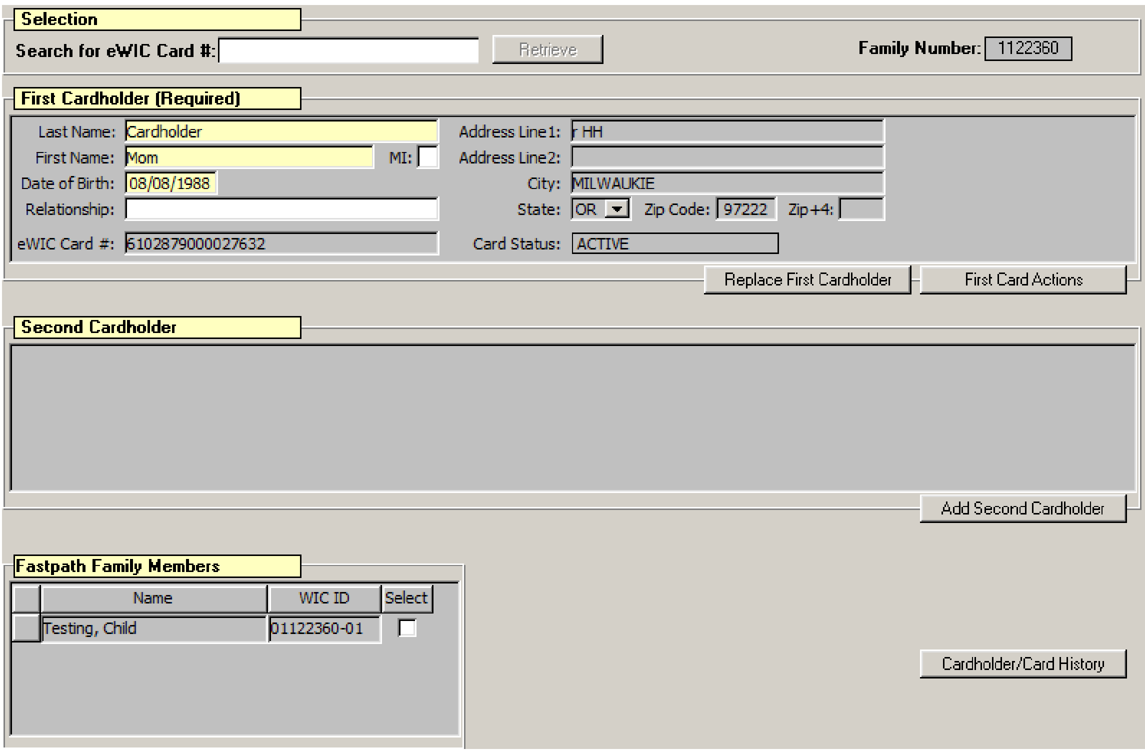


Figure 1: *Family Cardholder* Screen

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.

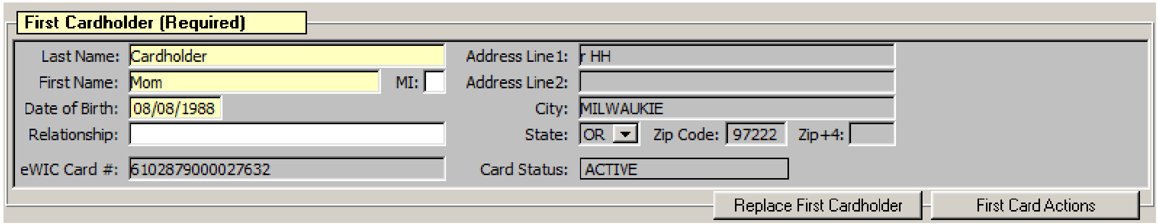


Figure 2: *First Cardholder* Fields

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.**

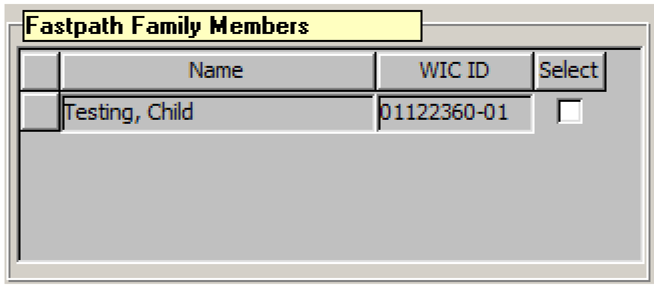


Figure 3: *Family Members* Section

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.

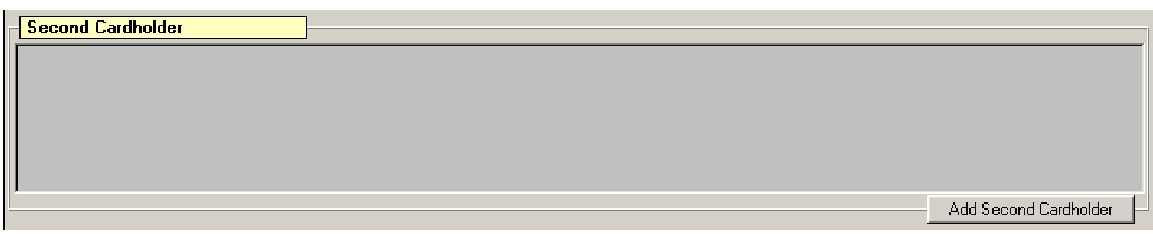


Figure 4: Add Second Cardholder Button

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.

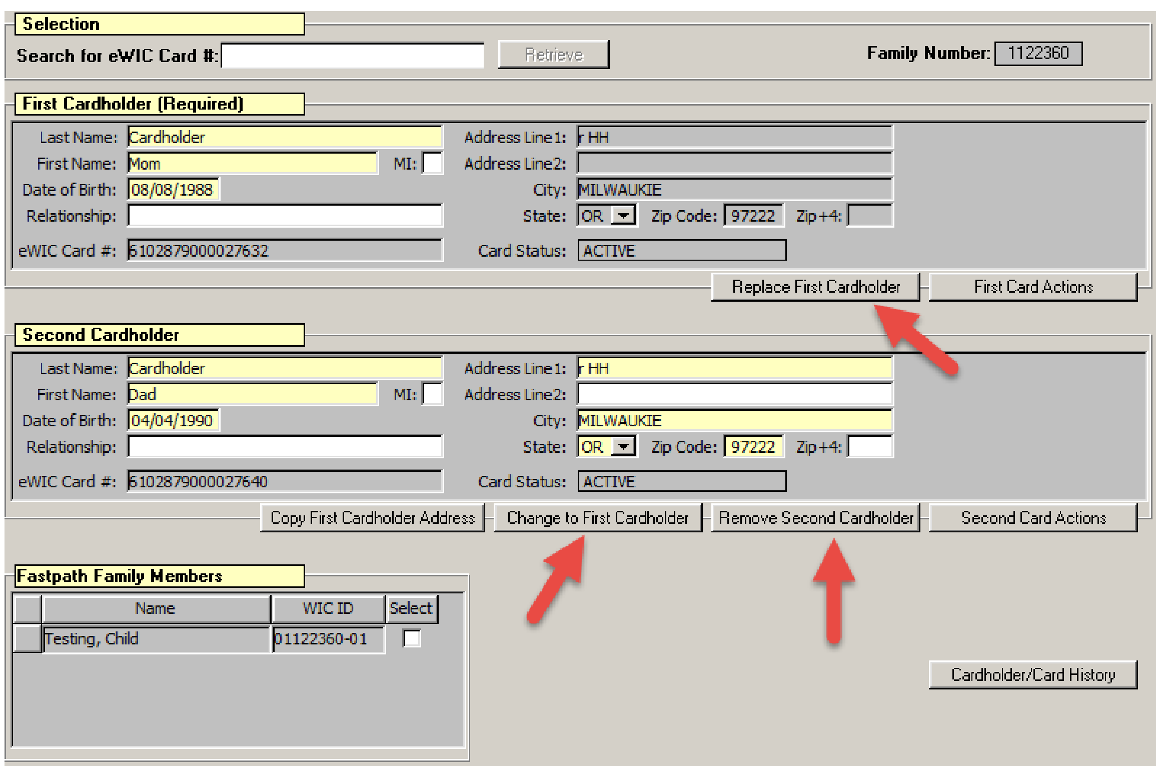


Figure 5: Buttons Used to Change Cardholders

"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.**
    - The Second Cardholder will continue to use their current card.
    - 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.

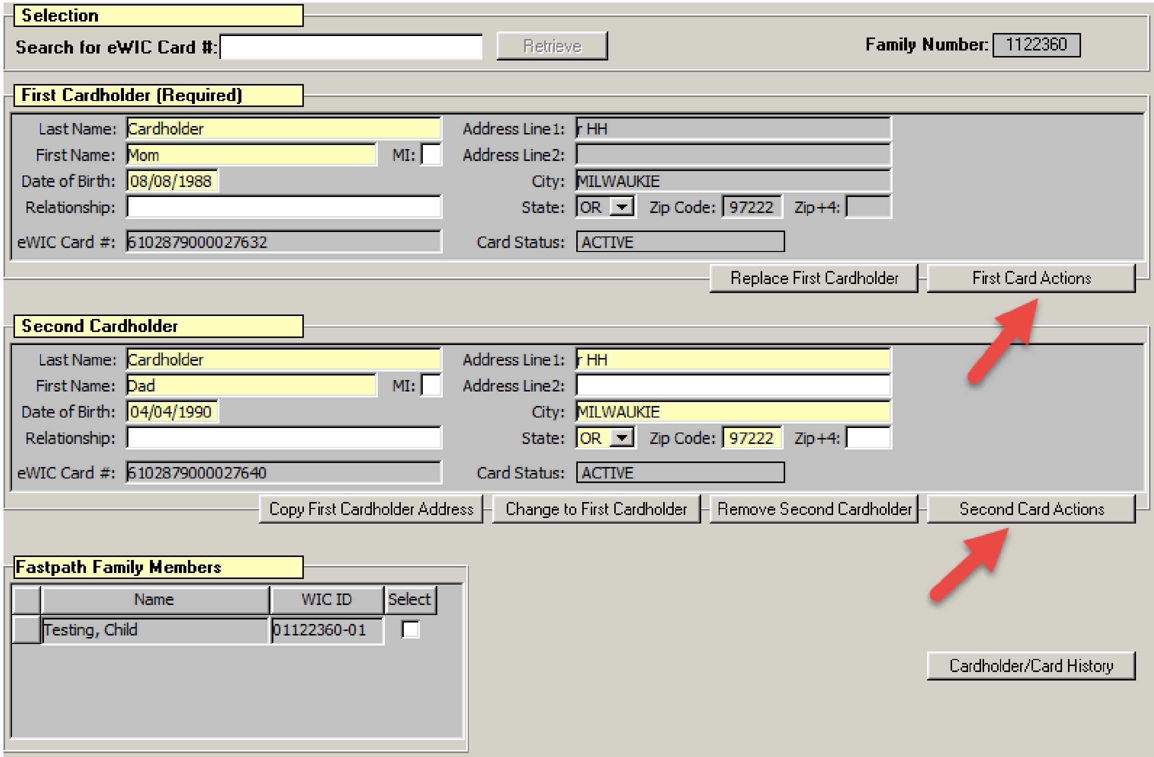


Figure 4: Buttons Used to Replace eWIC Cards

"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

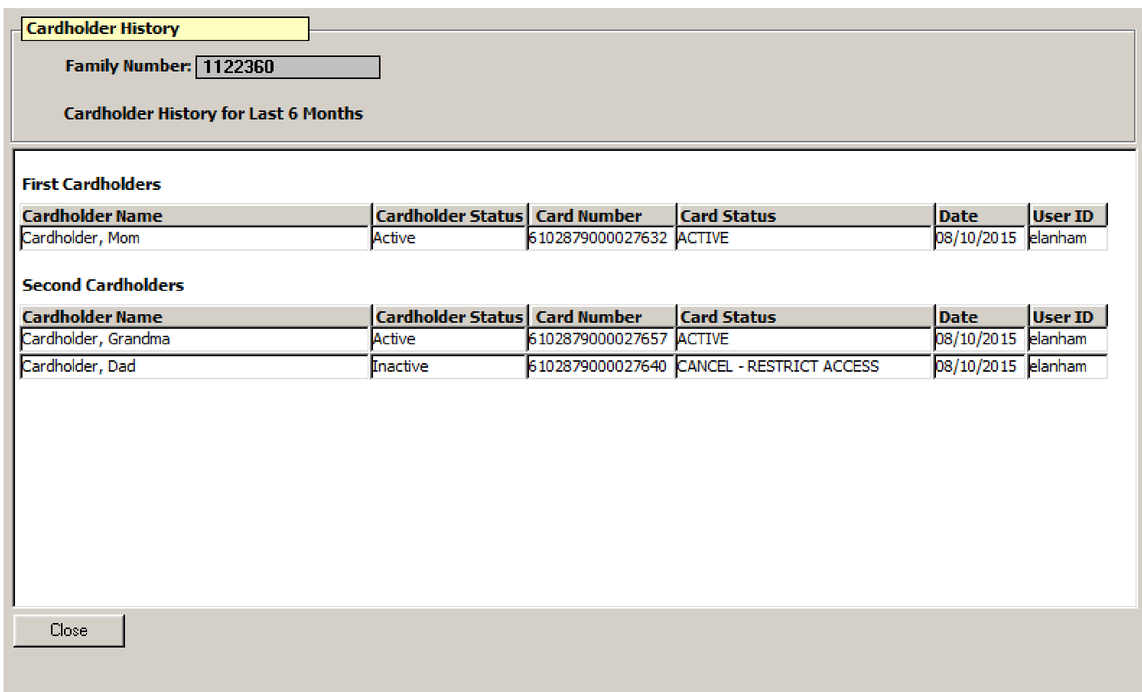
To update the first cardholder address, fast path to the Client Master Demographics and make the necessary changes. This updates the first cardholder's address, but does not update the second cardholder address, even if it had been the first cardholder address originally.

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.


Cardholder History

Family Number: 1122360

Cardholder History for Last 6 Months

First Cardholders

Cardholder Name	Cardholder Status	Card Number	Card Status	Date	User ID
Cardholder, Mom	Active	6102879000027632	ACTIVE	08/10/2015	elanham

Second Cardholders

Cardholder Name	Cardholder Status	Card Number	Card Status	Date	User ID
Cardholder, Grandma	Active	6102879000027657	ACTIVE	08/10/2015	elanham
Cardholder, Dad	Inactive	6102879000027640	CANCEL - RESTRICT ACCESS	08/10/2015	elanham

Close

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:

Chapter 4: Appointment Scheduler
Section 1: Scheduler Basics
Lesson: Special User – Introduction to Appointment Scheduler

Objectives:

Upon completion of this lesson the user will be able to:
- identify and explain various appointment scheduler terminology and codes;
- choose appropriate appointment codes for a given local agency situation;
- assign time durations to all appointment types, and
- define agency time preferences for AM, PM and Eve appointments

Oregon Policies:

♦ 606 TWIST Minimum Scheduler Usage

Overview:

Efficient appointment scheduling is the backbone of a well-run WIC clinic. The appointment scheduler is flexible, efficient and user friendly. The scheduler provides for all of the scheduling needs of any WIC clinic, including individual and group scheduling, re-scheduling, documentation of appointment attendance, automatic scheduling, appointment notification, and a wait list.

The focus of this lesson will be appointment types and appointment type durations (how long a specific appointment will be).

Instruction:

Understanding Basic Appointment Types

There are seven basic two character appointment types:

- **New appointments** start with an "**N**" and include the category in the type. For example, "NC" means "new child" appointment.
- **Recertification appointments** start with an "**R**" and include the category in the type. For example, "RI" means "recertify infant" appointment.
- **Follow-up appointments** start with an "**F**." There are 3 follow up appointments, type 1, 2, and 3. The meaning of these appointments is defined by each local agency.

- **Mid-certification health assessment appointments** start with an "**M**" and include mid-cert appointments for infants, breastfeeding women and children with year certifications.
- **Group appointments** start with a "**G**." There are 2 group appointment types "group screen" (GS) and "group education" (GE).
- **Individual education appointments** start with "**I**." "IE" means "individual education." The "IE" appointment type replaces the old use of a "follow-up" appointment to provide nutrition education to individuals rather than groups.
- **Food instrument pick-up appointments** start with "**P**" for pick-up.

☺ See Job Aid "Appointment Types" for more information.

The starting point for this section is:

Appointment Scheduler ⇨ Tables

The duration defines the length of time your agency will set aside for each appointment type. All appointment types, except generic appointment types, must have a duration assigned to them. The appointment type duration table is set up and maintained by each local agency, since the duration for each appointment type is not consistent statewide.

1. **Select "Appointment Type Duration."**

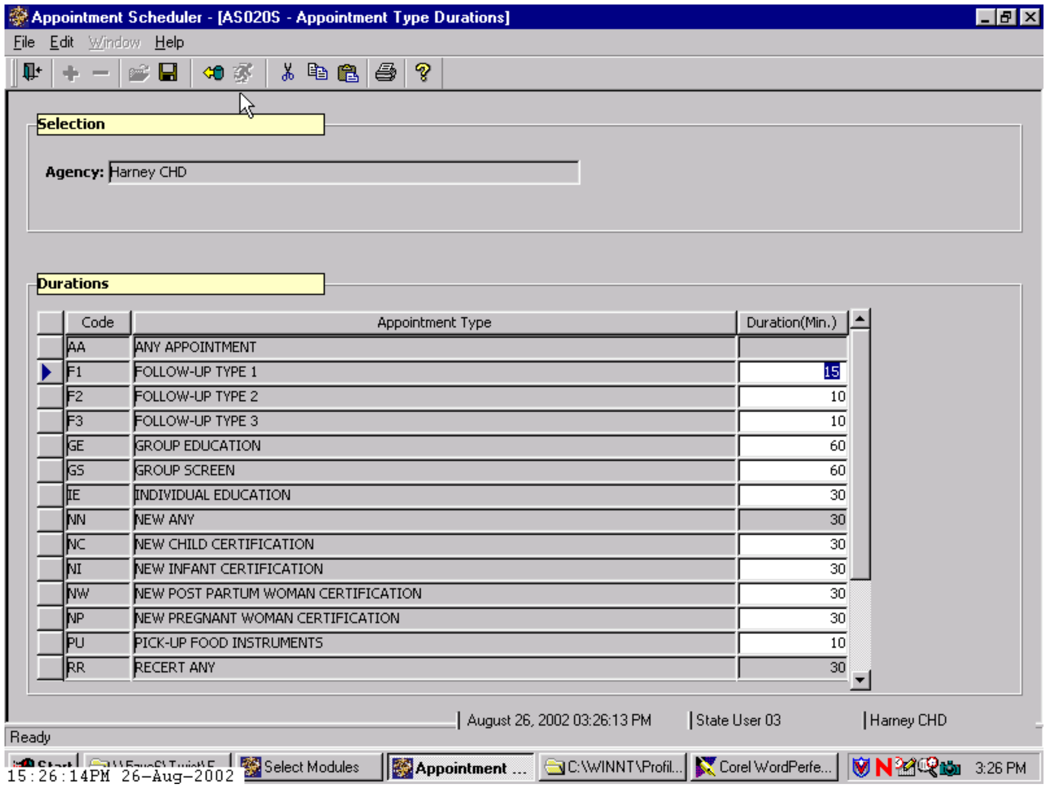


Figure 1: "Appointment Type Duration" Table

2. **Enter the duration for each appointment type in minutes using numerals only.**

3. **Exit.**

♫ NOTE: There will be three appointment types for which you will not be able to enter a duration: AA, RR and NN. These are generic appointment types and will be explained in the next section.

Understanding Generic Appointment Types

The starting point for this section is:

Appointment Scheduler ⇨ Tables ⇨ Generic Appointment Types

When setting up templates to create daily clinic schedules it is necessary to indicate which appointment type can be scheduled in each time slot. Using only specific appointment types (anything except AA, NN, RR) in a time slot would mean that in order for a client's appointment to be able to be scheduled into that slot it would have to be an exact match to the one the client needs.

In order for the system to be flexible there are "generic" appointment types. These are indicated by the "**is generic**" check box located in the appointment types base table. Generic appointment types remove the category requirement from the regular appointment types for recertification and new to create two generic types RR (any recert) and NN (any new) that will work for any category. The third generic type, AA (any appointment) removes the type and category requirement to create a generic slot that will work for any new or recert appointment for any category.

♬NOTE: Generic appointment types are used for creating time slots for schedule templates only and are never seen in a client's appointment record.

Each local agency will determine which regular appointment types can be slotted into times containing generic appointment types. For example,

- RR (any recert) could mean any combination or all of the recertification appointment types regardless of category.
- NN (any new) could mean any combination or all of the new appointment types regardless of category.
- AA (any appointment) could mean any combination or all of both recertification and new appointment types regardless of type or category.

See the scheduling examples below.

Example A limits what category of new or recertification appointment can be scheduled any a given time. This means when the system looks for an appointment for a client it will ignore any open appointments that do not exactly match the client's appointment type and category.

Example A

8:00	NW
8:30	RI
9:00	NC
9:30	RW
10:00	NI

Example B limits only when new appointments and recertification appointments can be scheduled and does not care about category. When the system looks for an appointment for a client it will ignore any open appointments that do not match the type of appointment the client needs (recert or new), but will disregard the category.

Example B

8:00 NN
8:30 RR
9:00 NN
9:30 RR
10:00 NN

Example C does not limit by type or category. When the system looks for an appointment for a client it will find all of these appointments to be available for any new or recertification appointment regardless of category.

Example C

8:00 AA
8:30 AA
9:00 AA
9:30 AA
10:00 AA

♫ NOTE: It is up to each individual agency to determine which (if any) generic appointment types will be used and what regular appointment types will be included in each generic type. Once set, generic appointment types apply to the whole agency and cannot be customized for each clinic within that agency

You will now be associating regular appointment types with generic types.

- All regular appointment types you associate with a particular generic type must have the same duration. For example, if you want to associate RC and RI with generic type RR, both RC and RI must have the same duration.
- Before beginning this exercise check the appointment type duration table to ensure that appropriate times are entered.

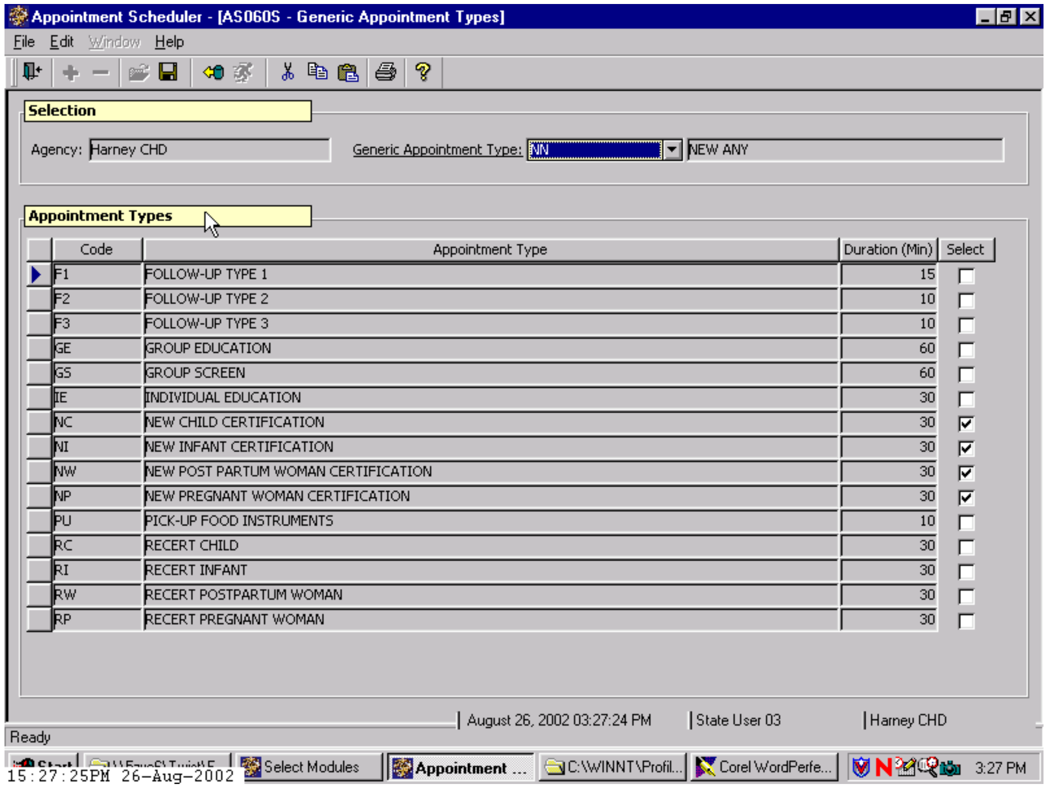


Figure 2: "Generic Appointment Type" Table

1. **In the selection area, click the drop down list on "Generic Appointment Type."**

2. **Select "AA (any appointment)."**

3. **In the appointment types area, click the select box beside each appointment type you want to include in the AA type.**

4. **Save.**

Set Time Preferences

The starting point for this section is:

Appointment Scheduler ⇨ Tables

The Time Preferences Table is used to specify how your agency chooses to define the "AM", "PM" and "EVE". For example, one agency might call any appointment after 4:00 p.m. and "evening" appointment, while another agency might prefer to start "evening" appointments at 5:00 p.m. The Appointment Scheduler uses this table when it matches appointment requests with time preferences indicated.

♫ NOTE: Time preferences can only be set for the whole agency, not for each individual clinic.

1. **Select "Time Preferences" from the drop-down list of tables.**

2. **Enter the start time and end time for each time preference.**

3. **Click "OK" and exit.**

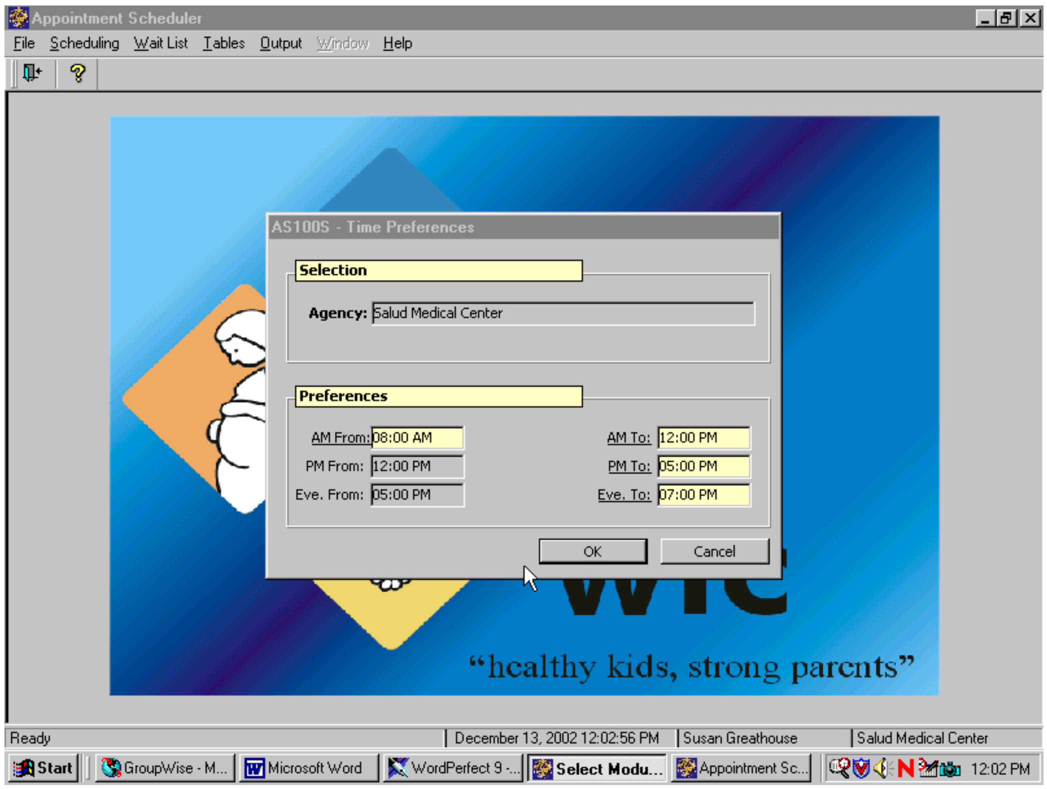


Figure 3: "Time Preferences" Table

✍ ***Notes:***

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Chapter 4: Appointment Scheduler
Section 2: Staff Schedules
Lesson: Special User – Template Maintenance

Objectives:

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

- create and maintain Appointment Scheduler templates.

Overview:

A well-designed appointment schedule is essential to all WIC clinics. In this lesson you will learn the first steps to creating a schedule — creating, modifying and copying templates.

Templates consist of time intervals, appointment types and other scheduling features. These templates will be used as patterns for "typical" days to create the clinic's appointment pages. Once a template is created you will be able to apply it to staff, specific days and clinic locations to build an appointment calendar for one day, a month or for an entire year. Templates may be used over and over again or they can be modified to meet the changing needs of the clinic.

Now let's look at setting up your templates to develop a "pattern" for your templates.

Instruction:

Creating A New Template

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Template Maintenance

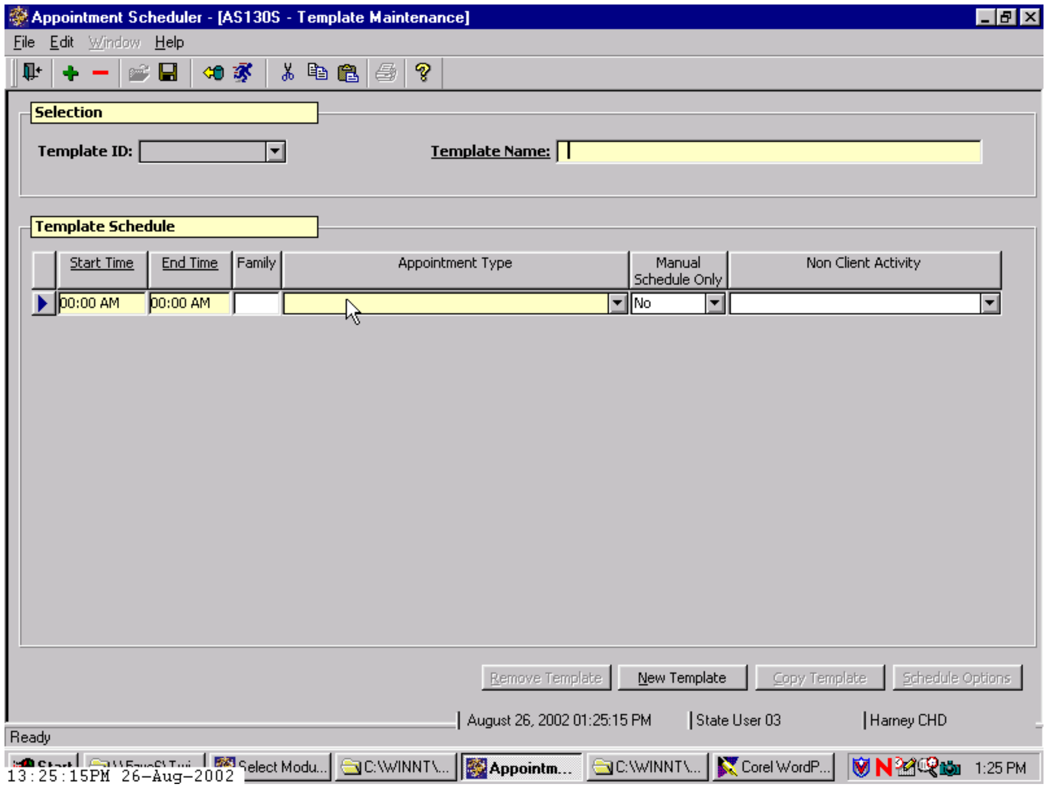

Figure 1: "Template Maintenance" Screen

1. **Click the "New Template" button.**

   The "**Template ID**" field will be grayed out and the cursor is now in the "**Template Name**" field.

2. **Enter the name of the template in the "Template Name" field.**

   The template name should reflect how the template will be used.

Example: A template used for all staff in clinic 0305 might be called 'Clinic 305 template.' The system will assign an ID number to the template once you have saved your work.

3. **Tab to the "Start Time" field and enter the time the first activity will begin.**

   - To change the AM to PM, hold down the shift key and enter a "P."
   - This field connects to the "**Clinic Hours**" in the "**Agency/Clinic Information**" screen in "**Operations/Management**." If you need to change the start or end times, you must first do this in the "**Clinic Hours**" tab.

4. **Tab to the "End Time" field.**

   - TWIST will calculate the "**End Time**" using the predetermined duration of the appointment type selected.
   - If information is entered in this field prior to selecting an appointment type, TWIST will override it with the predetermined end time for the appointment type selected.
   - The "**End Time**" may be modified after user selects appointment type.
   - If user changes the appointment type, a new end time will be calculated using the predetermined duration for the appointment type selected.
   - If non-client activities are selected, an end time must be entered.

5. **Tab to the "Appointment Type" field and select the appointment type from the drop down list.**

   Leave blank if this time slot is a "**Non Client Activity**."

♫ NOTE: Either appointment type or non-client activity must be selected.

6. **Tab to the "Manual Schedule" field.**

   6.1 The system defaults to "**No**." If this appointment is available for the automatic scheduler, leave "No" as the value.

   6.2 Setting this field to "**Yes**" reserves the appointment to save the slot for new or rescheduled appointments.

7. **Tab to the "Non Client Activity" and select the activity from the drop down list.**

   If this time slot is a client activity, leave blank.

   - Selecting a "**Non Client Activity**" will delete and grey out the "**Appointment Type**" and "**Manual Schedule**" field.
   - Either an "**Appointment Type**" or "**Non Client Activity**" can be selected, not both.

♫ NOTE: An inserting non-client activity prevents those times from being scheduled for any other activity or appointments.

8. **Tab to create additional rows.**

   - Follow steps three through eight to create additional appointments.

- Only one appointment type or activity can be selected for a time interval.
- If your time intervals overlap an error message stating "*Time cannot overlap*" will be displayed when you attempt to save your work.

9. **Save.**

   TWIST will display the ID number in the "**Template ID**" field.

♫ NOTE: Clicking the "**New Template**" button will clear the screen and allow you to begin a new template.

Modifying a Template

The starting point for this section is:
Appointment Scheduler ⇨ Scheduling ⇨ Template Maintenance

1. **Select the template to be modified from the "Template ID" drop down list.**

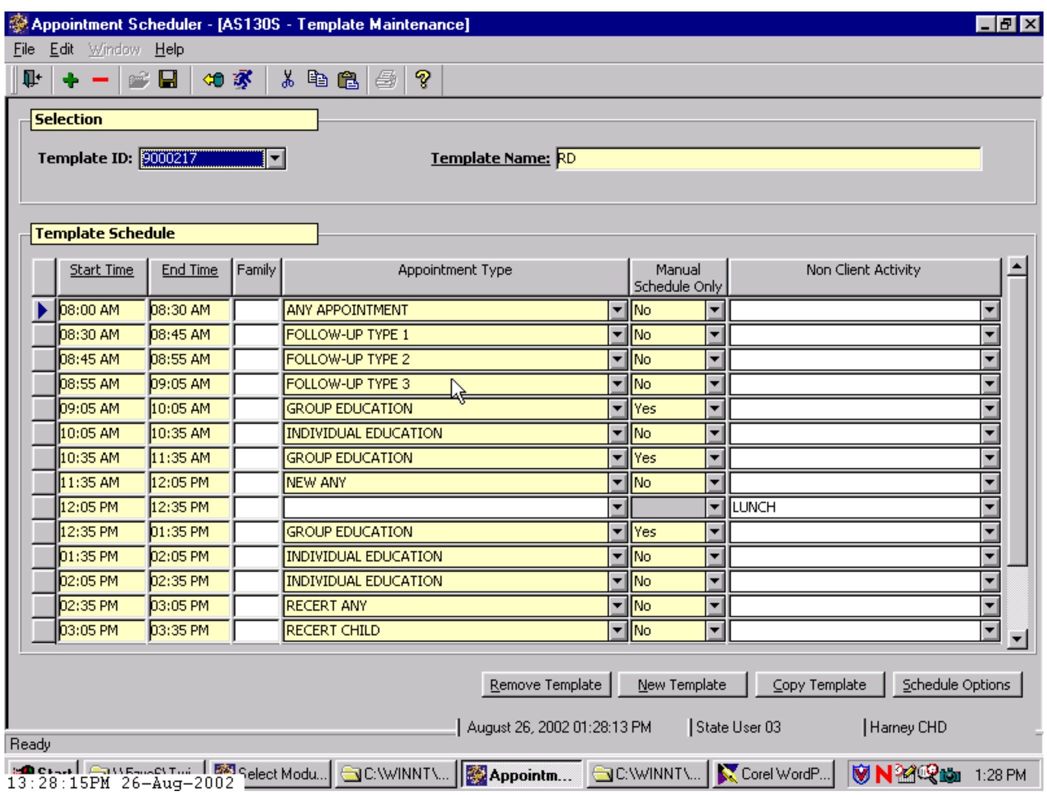

Figure 2: "Template Maintenance" Screen

The template information is displayed on the screen.

2. **Select the field you wish to modify and make your changes.**

   Any field in this screen may be modified except for the "**Template ID**" number.

3. **Save.**

   Your template has now been modified.

Copying a Template

This is a time saver for you. If you have more than one template that has the same basic pattern, you can copy the first one, rename it and simply make modifications to create a brand new template.

The starting point for this section is:
Appointment Scheduler ⇨ Scheduling ⇨ Template Maintenance

1. **Select the template to copy from the "Template ID" drop down list.**

   - The template information is displayed.
   - The number to the right of the "**Template Name**" indicates if this template is an original or a copy.
   - Any template followed by a zero is an original template.
   - If the template is followed by a number greater than zero, it is a copy of the template it is listed beneath.
   - You may only copy an original template.

2. **Click on the "Copy Template" button.**

   The "**Copy Template**" pop-up is displayed.

3. **Enter the name for the new template.**

4. **Click "OK."**

   The pop-up is closed and the "**New Template ID**" is displayed on the screen.

5. **Modify the template fields you wish to change.**

6. **Save.**

   Your copied template has been created.

Removing a Template

The starting point for this section is:
Appointment Scheduler ⇨ Scheduling ⇨ Template Maintenance

1. **Select the template to remove from the "Template ID" drop down list.**

   The template information will be displayed on the screen.

2. **Click the "Remove Template" button to remove this template.**

   A message stating "*Are you sure you wish to remove template?*" will be displayed.

3. **Click "Yes" or "No."**

♫ NOTE: You cannot remove an original template without first removing all the copies of it.

✂ *Tips and Shortcuts:*

- The "Refresh" icon will clear the screen and allow the user to create a new template or select from the drop down list.
- If you use the Automatic Scheduler function, be sure to code some of your template appointments as "manual – yes". This "saves" appointment slots to be used for reschedules and clean up after running the Auto Scheduler.

✍ *Notes:*

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Chapter 4: Appointment Scheduler
Section 2: Staff Schedules
Lesson: Special User – Template Scheduling Options

Objectives:

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

- set up a Daily Clinic Schedule.

Overview:

Now that you have learned how to create and modify templates, the second step to building a clinic schedule is to assign the template to staff members and specific days, weeks or months. The only difference in these three options is in how the time period to be scheduled is entered.

To schedule days you will enter only from and to dates. To schedule weeks you will enter a "from" date, the number of weeks to schedule and the days of the week to schedule. To schedule months you will enter the start month, the number of months to schedule and the days of the week to schedule.

In this lesson you will learn how to assign the template to any clinic, to one day or an entire year and to one or multiple staff members. In short, you will learn how to use templates to create a Daily Clinic Schedule.

Instruction:

Creating a Schedule

The starting point for this lesson is:

Appointment Scheduler ⇨ Scheduling ⇨ Template Maintenance

1. **Select the "Template ID" to be assigned to a staff member(s).** This can be an actual staff member or a pseudo (generic) staff member.

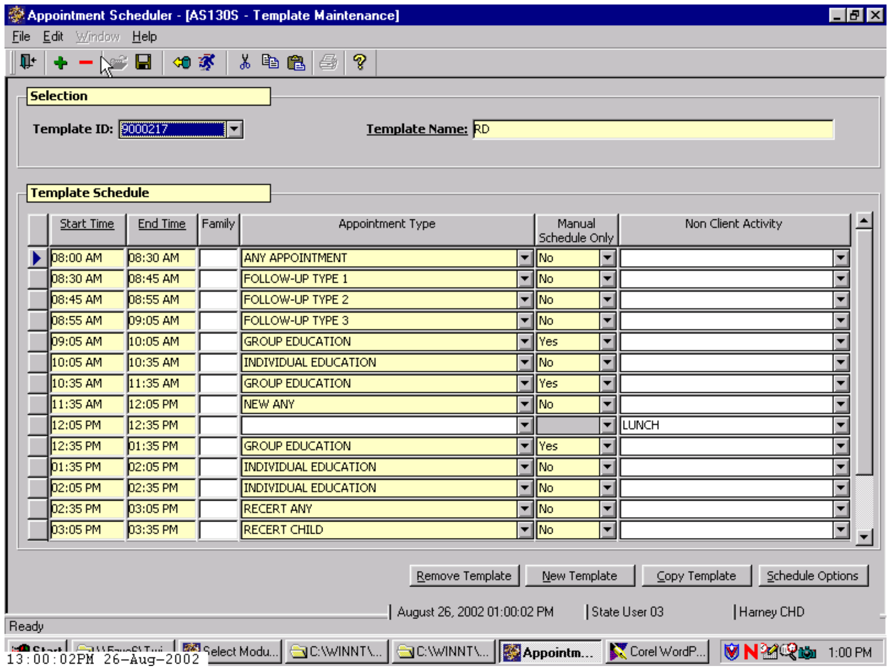

Figure 1: "Template Maintenance" Screen

2. **Click on the "Schedule Options" button.**

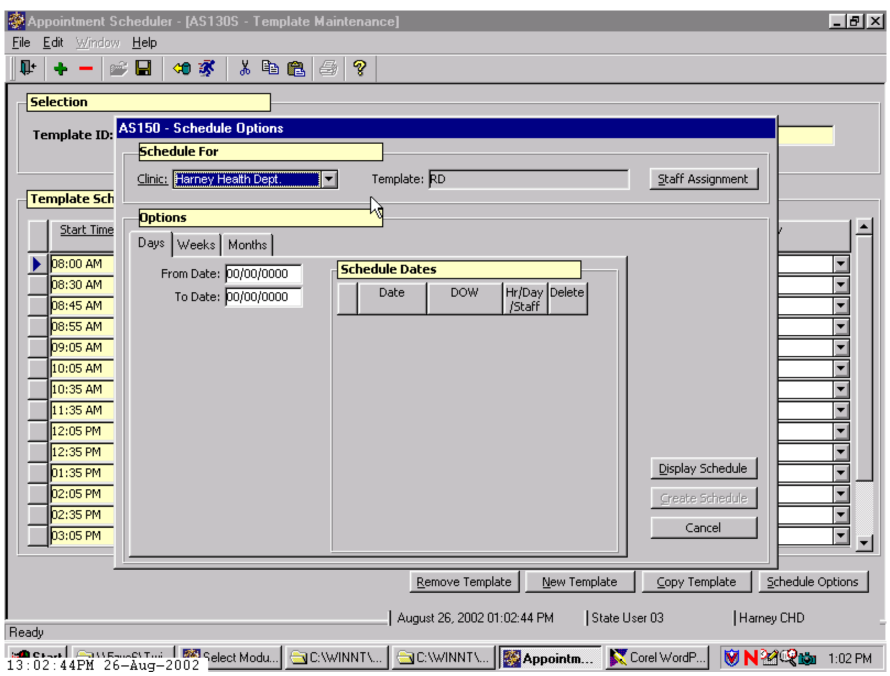

Figure 2: "Schedule Options" Pop-Up

3. **In the "Schedule For" section of the screen, select the clinic from the drop down list.**

   - The "**Template Name**" is displayed.
   - The "**Staff Assignment**" button is enabled.

4. **Click on the "Staff Assignment" button.**

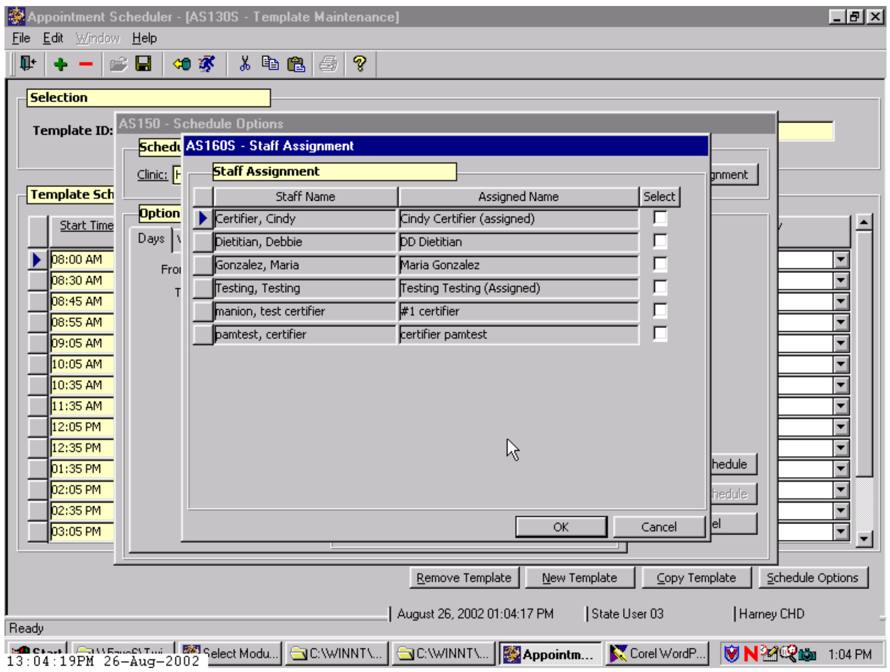

Figure 3: "Staff Assignment" Pop-Up

All the staff members assigned to this clinic are displayed in the "**Staff Assignment**" pop-up window.

5. **Check the "Select" box next to the name of the staff member(s) you want to assign the template.**

   One or more staff members may be selected.

6. **Click "OK" to close the pop-up.**

7. **In the "Options" section of the screen, select only one of the three time period selections:**

   7.1 "**Days**" – Choose this option to schedule for specific days.

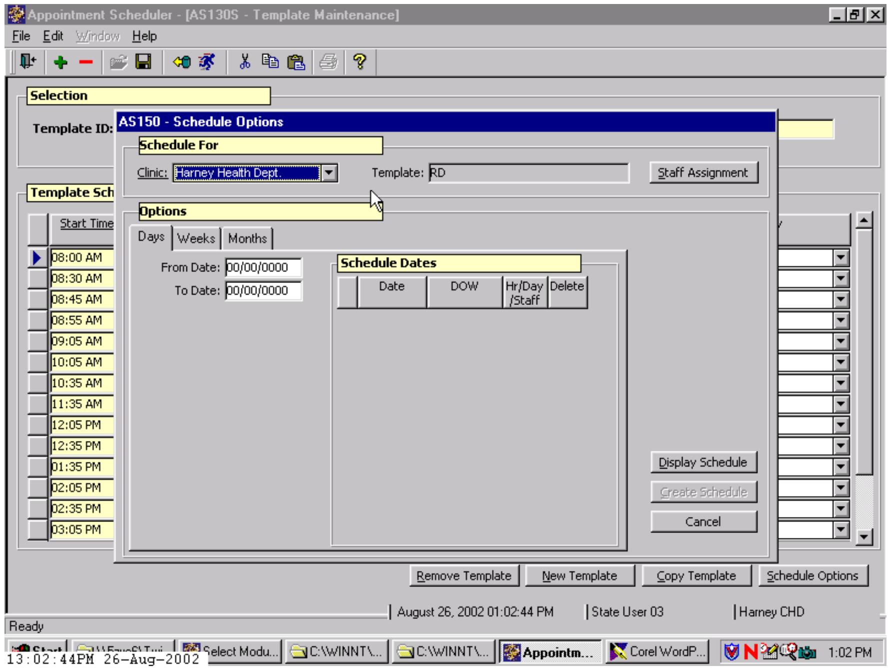

Figure 4: "Days" Selection

- Enter "**From Date**" and "**To Date**" dates.
- The end date may be the same as the start date when scheduling only one day.

7.2 "**Weeks**" – Choose this option to schedule for specific weeks.

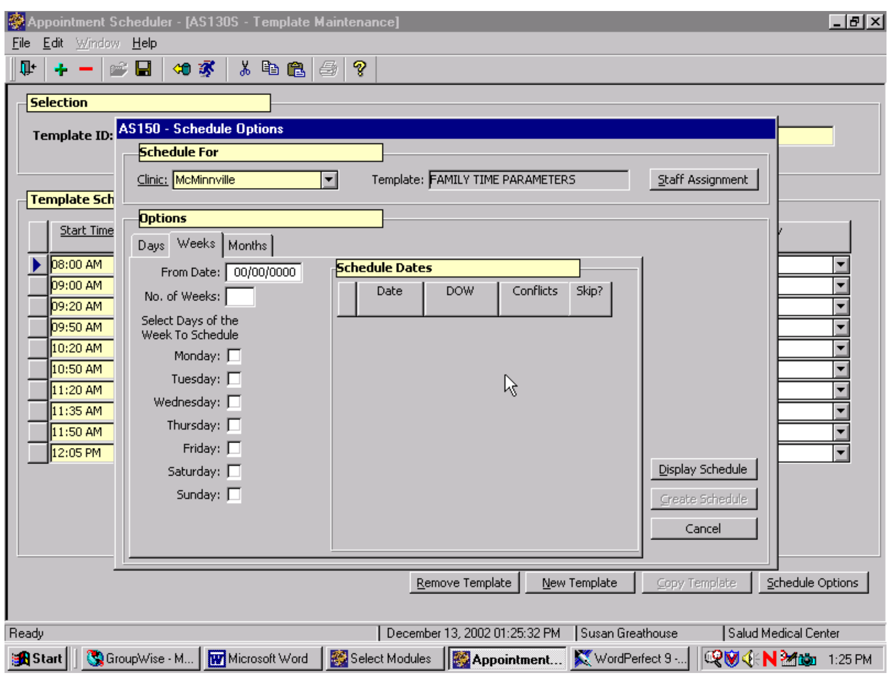

Figure 5: "Weeks" Selection

- Enter “**From Date**,” “**No. of Weeks**” and “**Days of the Week to Schedule**.”

7.3 “**Months**” – Choose this option to schedule for specific months.

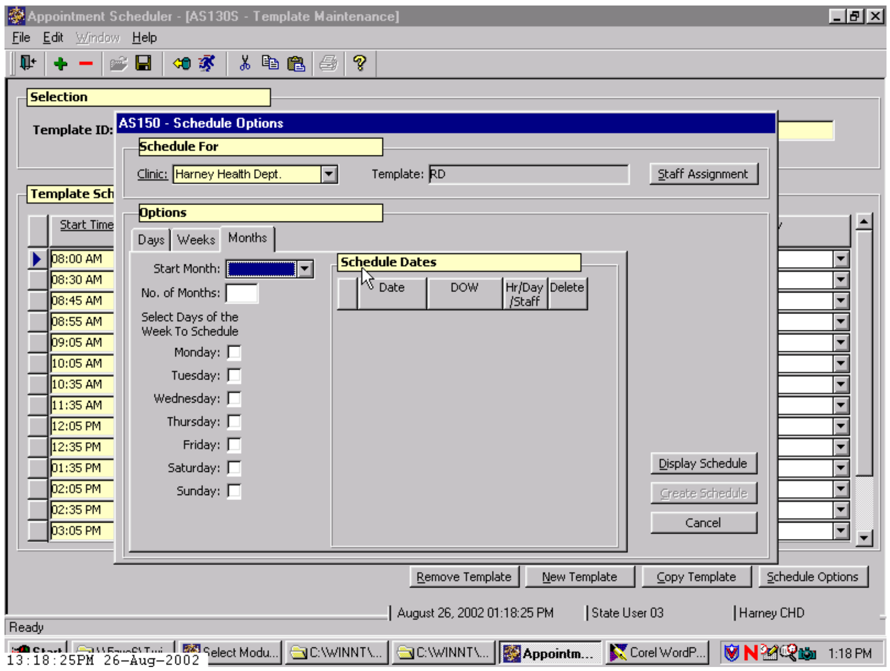

Figure 6: “Months” Selection

- Enter “start month,” the “number of months” and the “days of the week to schedule for.”

8. **Click the “Display Schedule” button.**

All days selected will display under the “**Schedule Dates**.”

8.1 The “**Date**” field will display the day of the month.

8.2 The “**DOW**” field will display the day of the week.

8.3 The “**Conflicts**” field will display codes when conflicts between clinic and template information exist.

- An “**A**” indicates that **appointment** slots already exist and the template overlaps these slots.
- A “**D**” indicates the clinic is closed on this **day**.
- An “**H**” indicates the **hours** in the template do not match the hours of operation for the clinic.

- An "**O**" indicates that the staff person is already scheduled in **other** clinic that same day.
- An "**S**" indicates **staff person** has appointments booked at this clinic or another clinic on this date. It does not indicate which staff when multiple staff were assigned.
- Multiple conflicts can exist.

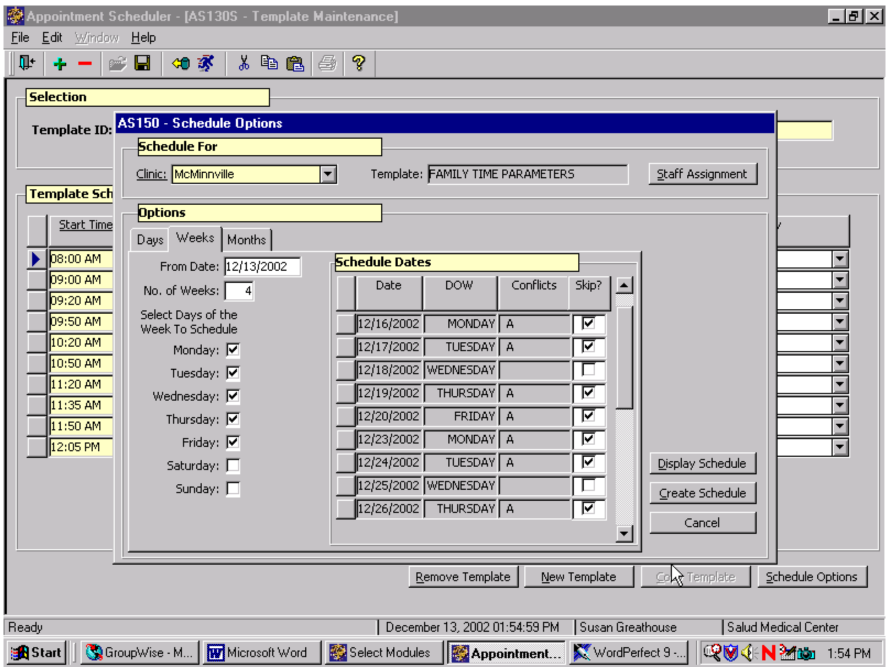

Figure 7: "Scheduling Conflicts" Screen

8.4 The "**Skip**" box will be automatically checked if the "**Conflict**" field is populated.

- TWIST will not create a schedule for days with the "**Skip**" box checked.
- The user can uncheck the "**Skip**" box and override the system to create the schedule for that day, unless there is an "**A**" code in the "**Conflict**" field. In this case, you must first reschedule any booked appointments for that day(s) before you can use the "**Skip**" function.
- The user may check the "**Skip**" box to manually exclude any particular day when creating the schedule.

☺ See Job Aid "Schedule Conflict Codes" for more information.

9. **Click the "Create Schedule" button.**

9.1 The schedule will be created for the selected staff members.

- The pop-up is closed and the user is returned to the "**Template Maintenance**" screen when the schedule is successfully created.
- If the schedule was not created, an error message will be displayed indicating the problem.
- If the error indicates a staffing problem occurred you will need to review each staff member individually to identify the problem and make corrections.

9.2 If you have unchecked the "**Skip**" box (for a template scheduling conflict) and then click the "**Create Schedule**" button, you will be given three options:

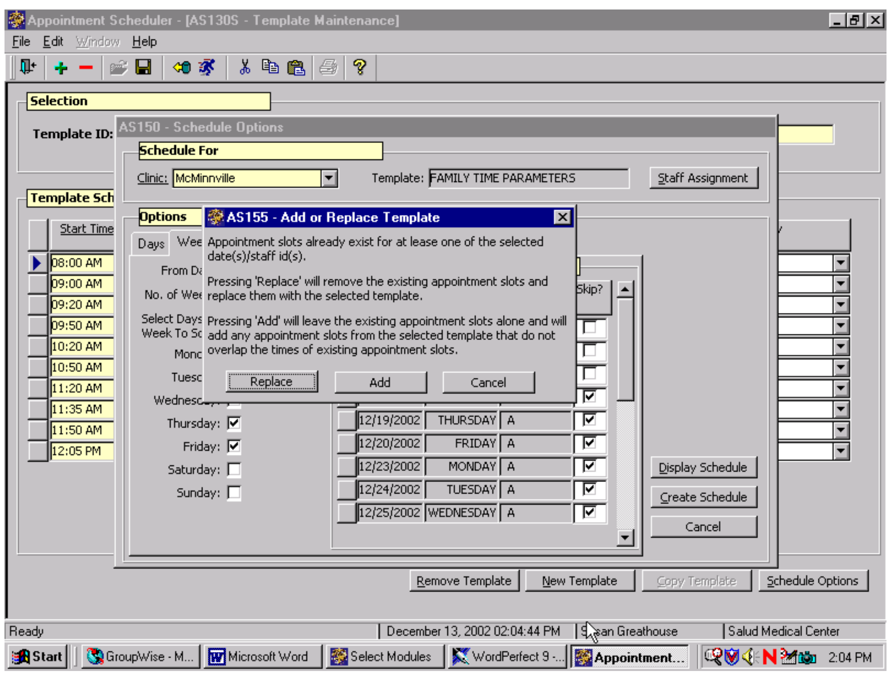

Figure 8: "Add or Replace Template" Pop-Up

- "**Replace**" will remove the existing appointment slots and replace them with the selected template. If the conflict code is "O" (staff has existing schedule in a different clinic), clicking "Replace" will delete the schedule in the first clinic and schedule the template in the new clinic.
- "**Add**" will leave the existing appointment slots alone and will add any appointment slots from the selected template that do not overlap the times of existing appointment slots.

Selecting the "Add" option when the schedule conflict is "O" will result in schedules being created for the same staff person in two different clinics.

- "**Cancel**" will close the pop-up and return you to the "**Schedule Options**" screen without scheduling the template.

10. **Exit the "Template Maintenance" screen.**

✂ *Tips and Shortcuts:*

- If an "**S**" is displayed in the "**Conflict**" field when multiple staff were selected, create the schedule for one staff person at a time to easily identify your error.
- You can make changes to a template and recreate the schedule without deleting any data providing no appointments have been scheduled for the days you want to recreate.

✍ *Notes:*

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Chapter 4: Appointment Scheduler
Section 2: Staff Schedules
Lesson: Daily Clinic Schedule

Objectives:

Upon completion of this lesson the user will be able to:
- have a general understanding of how Daily Clinic schedules are created;
- view appointments for a specific clinic day;
- understand and interpret all fields in the "Daily Clinic Schedule" screen; and find and interpret the appointments assigned to a staff person.

Overview:

The scheduling person in your agency creates daily clinic schedules by applying an appointment pattern (called a template) to specific days and staff.

Once a basic schedule has been created, your scheduling person will use the "Daily Clinic Schedule" screen to "complete" the schedule. This includes adding classes and group screenings, and finessing individual staff schedules to include things like doctors' appointments and meetings. Once schedules are complete, the "Daily Clinic Schedule" can be thought of as an appointment book from which appointments can be displayed, booked, rescheduled, deleted or canceled.

Instruction:

Reviewing the "Daily Clinic Schedule" Screen

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

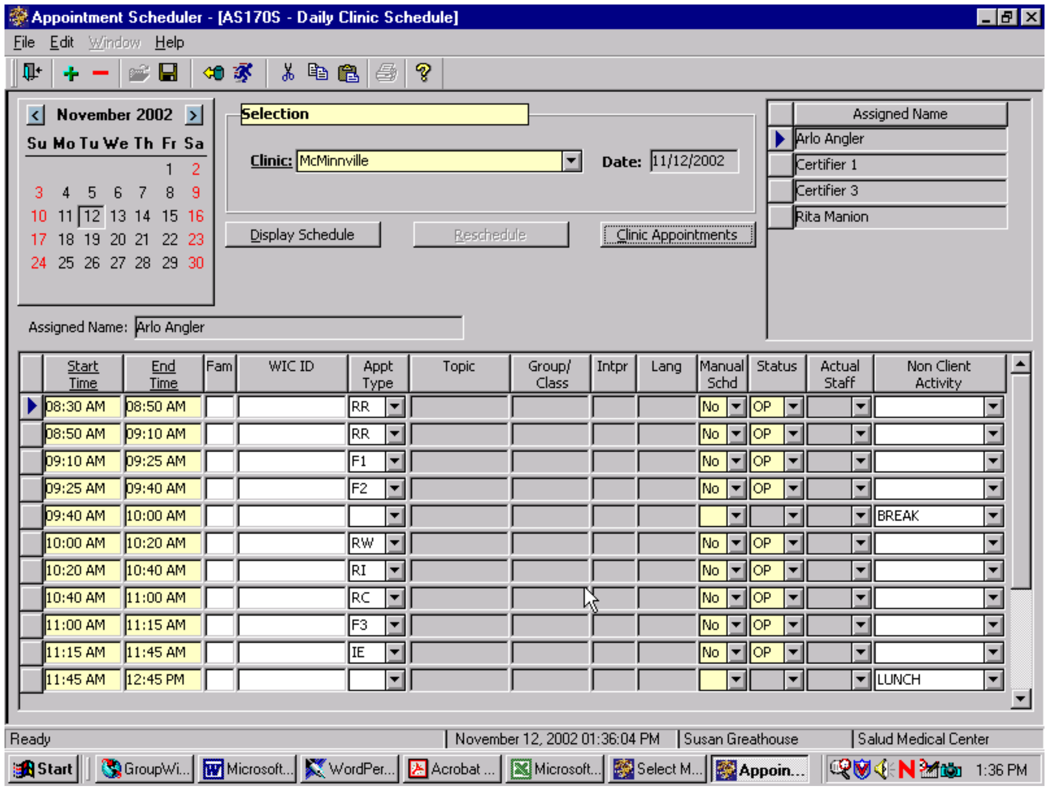

Figure 1: "Daily Clinic Schedule" Screen

The screen consists of four main sections:

- In the upper left there is a graphical calendar display which displays the days of the month and year.
- In the upper middle, the "**Selection**" section allows you to select the clinic for viewing the daily clinic schedule.
- In the upper right, the "**Assigned Name**" displays the staff names of those assigned to the schedule.
- The lower half of the screen is where the daily clinic schedule of appointments are viewed.

♫ NOTE: There are two "assigned name" fields on this screen. The one in the top right of the screen lists all staff that is scheduled for the day selected. The other one, found just below the calendar, lists only the single staff person whose schedule is displayed.

Viewing a Staff Member's Daily Clinic Schedule

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

1. **In the "Selection" section, select the "Clinic" from the drop down list.**

2. **In the "Calendar" section, click on the number corresponding to the day on which you wish to view appointments.**

   - When you first enter the screen, the current month will be displayed.
   - Click on the "**< >**" buttons to move forward or backward by month through the calendar.

3. **Click the "Display Schedule" button.**

   - The system displays the date selected in the "**Date**" field.
   - The "**Reschedule**" button is activated when you click on a filled appointment slot. This function will be discussed further in another lesson.
   - The "**Assigned Name**" section displays the list of staff names that have a schedule for the date selected. The person whose schedule is displayed will have the indicator arrow on their name.

4. **Click on any staff person listed under "Assigned Names."**

   - The schedule below the "**Assigned Name**" area will change depending on which staff you select.
   - The "**Assigned Name**" field just above the schedule will show the single staff person's name that you have selected.
   - Double-clicking on the assigned name of a staff person will show the staff name, risk level of client they are allowed to serve and the languages that they speak

5. **Click on an appointment slot in the schedule.**

   5.1 The "**Assigned Name**" field displays the staff member's name corresponding to the daily schedule you are viewing.

   5.2 The "**Start Time**" field is the scheduled start time of the appointment.

   5.3 The "**End Time**" field is the scheduled end time for the appointment.

   5.4 The "**Fam**" field indicates whether or not this time slot was set up for booking more restricted family coordinated appointments.

- If the "**Family Precoding**" field was set up as "**Yes**" in the "**Agency/Clinic**" screen, then family appointments booked by the automatic scheduler can only be booked into time slots that have an "**F**" in this field.
- If the schedule was set up with the "**Family Precoding**" as "**No**," then family coordinated appointments may be booked anywhere and the "**Fam**" field will be blank.

5.5 The "**WIC ID**" field displays a client's WIC ID number.

- Double-clicking a "**WIC ID**" field populated with a client's WIC ID number causes the "**Client Information**" pop-up to be displayed. This pop-up lists client's name, DOB and WIC category.
- If a GE (Group Education) or GS (Group Screening) appointment has been scheduled in this slot, the "**WIC ID**" field will be grayed out.

5.6 The "**Appt Type**" field lists the type of appointment that has either been scheduled or is designated for this time slot. Clicking on this field displays the list of appointment types and their corresponding codes.

5.7 The "**Topic**" field displays the topic of a scheduled GE appointment.

5.8 The "**Group/Class**" field displays the Group or Class code if the scheduled appointment is either a GE or GS appointment.

Double-clicking in the "**Group/Class**" field will take you to the "**Group Education Classes**" screen, where you can schedule and reschedule GE classes.

5.9 The "**Intpr**" field indicates whether or not an interpreter is needed for this appointment. The system automatically assigns "**Yes**" if, when scheduling, the staff's language(s) do not match the client's needs.

5.10 The "**Language**" field displays the language spoken by the client as indicated in their client record in the "**Client Primary**" screen. This field is only active if the "**Intpr**" field is "**Yes**."

5.11 "**Manual Schd**" displays "**Yes**" or "**No**" to indicate if this appointment can be scheduled manually. If yes, then when the

Automatic Scheduler is run it will not schedule anyone into the appointment slot. It will be reserved for manual scheduling and will show up as an available appointment.

5.12 The "**Status**" field displays the current status of the appointment. Clicking on this field displays the list of statuses and their corresponding codes. The appointment statuses are as follows:

- BK Booked appointment
- SH Showed for appointment
- NS No-show appointment
- OP Open appointment
- WI Walk-in appointment

When a status of "**Show**" is selected, the "**Actual Staff**" field becomes active but is not mandatory in Daily Clinic Schedule.

5.13 The "**Actual Staff**" field is used to capture the ID of the staff person who actually saw the client. This ensures that the correct staff person is given credit for seeing the client. This field can be entered on this screen but will usually be filled in by the certifier on the "**Family Appointment Record**" screen during an appointment.

5.14 The "**Non-Client Activity**" field is used to show the description of a non-client activity for this time slot, if one is scheduled. Clicking on this field displays the list of non-client activities. A non-client activity is any activity that does not include working directly with a client. It could be paperwork, meetings, vacation, etc.

➥ *Practice Activity #1:*

Now that you have learned how to view and move around the "Daily Clinic Schedule" screen, let's practice.

You are a WIC certifier and would like to see what your schedule looks like for an upcoming day. Take the appropriate actions to do this. Use the information from your ☛ Activity Sheet. Do a screen print of your schedule.

Viewing the Clinic Appointments List

This section is very similar to your appointment book or current schedule. Just like your appointment book, this screen lists all staff members' schedules; clients scheduled, and open appointment times. This screen can be sorted either by staff or time.

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

1. **Click the "Clinic Appointments" button.**

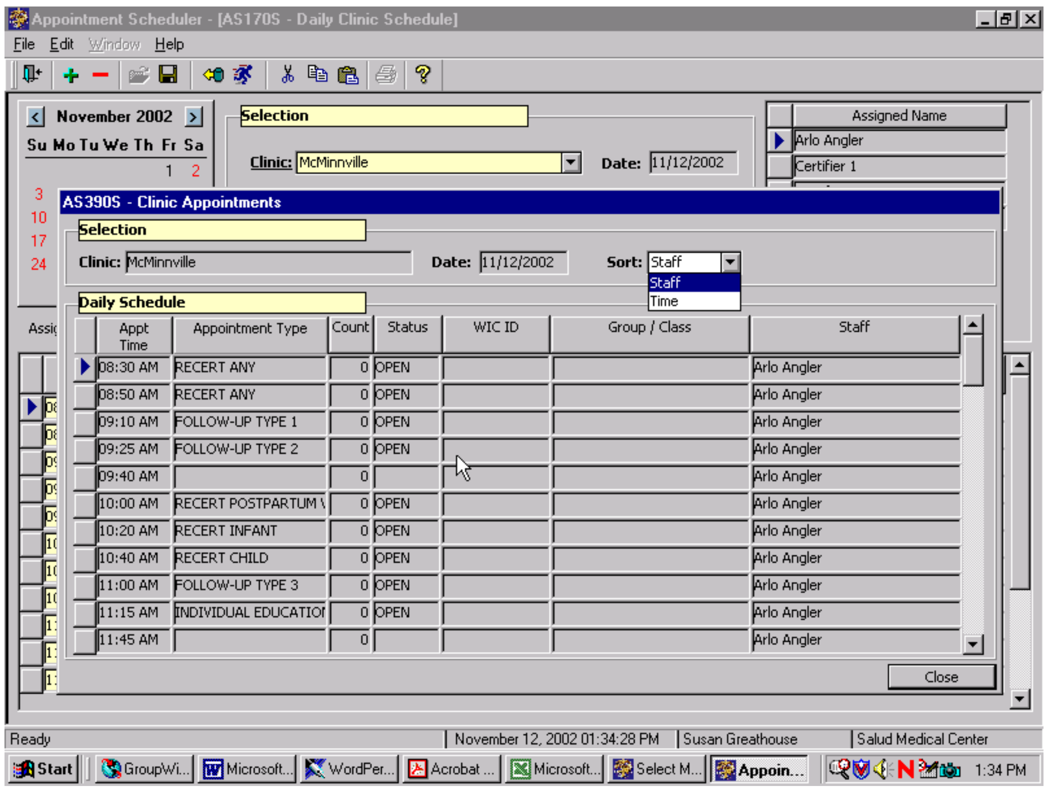

Figure 2: "Clinic Appointments" Pop-Up

- The system displays the "**Clinic**" and "**Date**" based on your selection on the "**Daily Clinic Schedule**" screen.
- Appointments can be sorted by staff or time

2. **Select "Staff" from the "Sort" field drop down list.**

   2.1 The daily appointment listings for the date and clinic selected will be displayed in chronological order, but grouped for each staff member in alphabetical order.

   2.2 The "**Appt Time**" field displays the scheduled start time of the appointment.

2.3 The "**Appointment Type**" field displays the description of the appointment type.

2.4 The "**Count**" field displays the count of clients scheduled for the appointment.

2.5 The "**Status**" field displays the status of the appointment.

2.6 The "**WIC ID**" field displays a client's WIC ID number. If a GE (Group Education) or GS (Group Screening) appointment has been scheduled in this slot the field will be grayed out.

2.7 The "**Group/Class**" field displays the Group or Class code if the scheduled appointment is either a GE or GS appointment.

2.8 The "**Staff**" field displays the name of the staff person assigned to this appointment slot.

3. **Click the "Close" button**

➥ *Practice Activity #2:*

Using the information on your ☛ Activity Sheet, follow the steps below to view the Daily Clinic Schedule.

The starting point for this activity is:

Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

1. Select the "Clinic" from the drop down list.
2. Click on the desired calendar date.
3. Click the "Display Schedule" button.
4. Click the "Clinic Appointments" button.
5. On the "Clinic Appointments" pop-up screen, select "Time" from the "Sort" field drop down list to view the appointments by time listing.
6. Select "Staff" from the "Sort" field drop down list to view the appointments by staff listing.
7. Click "Close."
8. Exit the "Daily Clinic Schedule" screen.

Updating a Staff Member's Daily Schedule

Schedules are never static, so there will always be times when changes to existing schedules must be made. The modification of an existing schedule is easily done on the "**Daily Clinic Schedule**" screen.

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

1. **In the "Selection" section, select the "Clinic" from the drop down list.**

2. **In the "Calendar" section, click on the number corresponding to the day on which you wish to view appointments.**

   - When you first enter the screen, the current month will be displayed.
   - Click on the "**< >**" buttons to move forward or backward by month through the calendar.

3. **Click the "Display Schedule" button.**

   - The system displays the date selected in the "**Date**" field.
   - The "**Reschedule**" button is activated if there are any appointments currently scheduled on this date for this staff member. This function will be discussed further in another lesson.
   - The "**Assigned Name**" section displays the list of staff names that have a schedule for the date selected. The person whose schedule is displayed will have the indicator arrow on their name.

4. **Click on any staff person listed under "Assigned Names."**

   - The schedule below the "**Assigned Name**" area will change depending on which staff you select.
   - The "**Assigned Name**" field just above the schedule will show the single staff person's name that you have selected.
   - Double-clicking on the assigned name of a staff person will show the staff name, risk level of client they are allowed to serve and the languages that they speak.

5. **Find an open appointment slot and delete it.**

   Use the "**Remove**" icon in the top tool bar to do this.

6. **Find an open appointment slot and add a non-client activity.**

   Use the drop down list in the "**Non-Client Activity**" field to do this. The appointment type will disappear once the non-client activity is selected.

7. **In another open appointment slot change the appointment type to "GE."**

   The appointment end time will change based on the duration of the "**GE**" appointment type.

8. **Manipulate or delete some of the appointment times after the "GE" appointment so there are no overlapping appointments.**

9. **Save and exit.**

♫ NOTE: If there are booked appointments in an appointment slot they must be rescheduled before the slot can be manipulated.

✂ *Tips and Shortcuts:*

- If you want to delete more than one row of a daily clinic schedule, you can click on the rows you want to delete while holding down the "Shift" key. The rows selected will be highlighted. Then click on the "–" icon to remove the rows.
- To delete an entire schedule, click on the bottom left edge of the schedule while holding down the shift key. This will highlight the entire schedule. Then click on the "–" icon to remove the rows.

➥ *Practice Activity #3:*

Using the information on your ☛ Activity Sheet, follow the steps below to modify an existing schedule.

The starting point for this activity is:
Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

1. Select "Clinic" from the drop down list.
2. Click on desired schedule date.
3. Click the "Display Schedule" button.
4. Select an open appointment slot and delete it using the "Remove" icon.
5. Select an open appointment slot and change the appointment type to "GE."
6. Modify (or delete) some of the appointment times after the "GE" appointment so there are no overlapping appointments.
7. Using the "Insert" icon, insert a row and add an appointment.
8. Save and exit.

✓ Skill Check:

Being able to modify a staff person's schedule is an important task for a person doing the scheduling. Let's see what you can do.

You are the person who creates and maintains schedules for your clinic. A certifier comes to you and tells you she has a doctor's appointment next month and will be out for the entire afternoon. She also has an hour-long meeting at 9:00 that same morning. Manipulate her schedule to accommodate her requests. Your instructor will give you the staff person's name to use.

Do a screen print of the schedule after it is modified.

✍ Notes:

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Chapter 4: Appointment Scheduler
Section 3: Automatic Scheduler
Lesson: Special User – Automatic Scheduler

Objectives:

Upon completion of this lesson the user will be able to:
- explain the basic functionality and potential use of the Automatic Scheduler and how it is linked to the client record; and
- use the automatic scheduler.

Overview:

Automatic scheduling is a feature of the TWIST appointment scheduler that allows you to give a client a "request" for an appointment for some month in the future that is then "booked" to a specific date and time when the automatic scheduler is run. This feature can be used to schedule individual appointments, including follow-up and FI pick-up appointments, group education/class appointments, and group screening appointments.

The automatic scheduler will go through a sort order as defined by the State that schedules the highest priority and most complicated appointments first. This is not an interactive process. The user must make a "request" for TWIST to run the auto scheduler, which is run as part of End of Day processes.

Instruction:

Automatically Scheduling Appointments

The starting point for this section is

Appointment Scheduler ± Scheduling ± Automatic Scheduler

This is the screen that you use to request an Auto Scheduler run.

1. **Click in the "Clinic" field**.

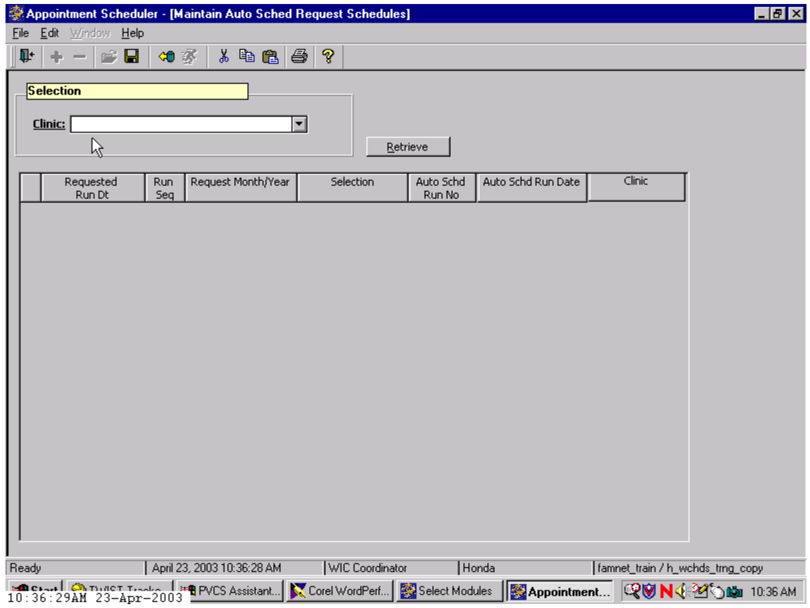

Figure 1: "Maintain Auto Scheduler" Requests

2. **Select the clinic for which you want to run the Auto Scheduler**
   If you leave the "Clinic" field blank, screen will display requests for the entire agency. You cannot enter information at the agency level, only at the clinic level.

3. **Click the "Retrieve" button to view existing auto scheduler requests.**

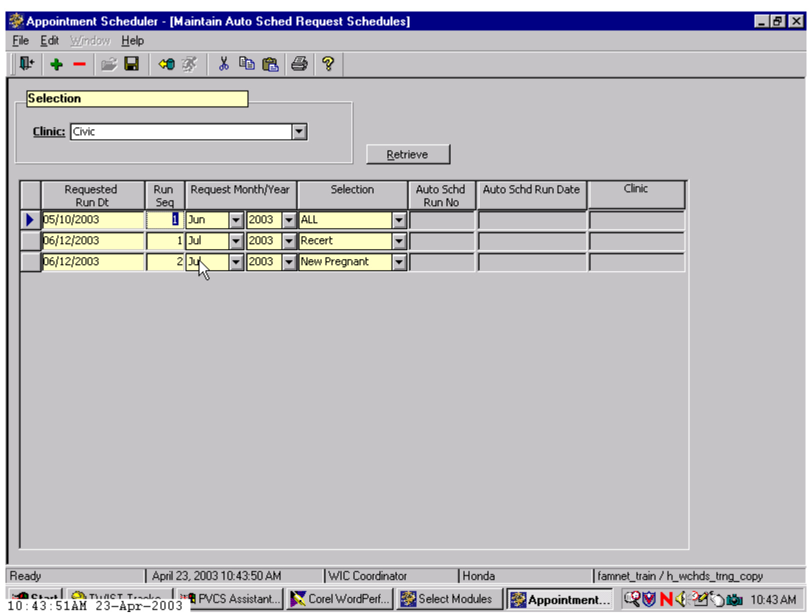

Figure 2: Existing Auto Scheduler Requests" Screen

3.1 **Requested Run Date** is the date when you want End of Day to run the auto scheduler.

3.2 **Run Sequence** is the order in which you want End of Day to run your requests when you have multiple requests for the same date. You must enter a number in this field.

3.3 **Request Month/Year** are drop-down windows where you select the month and year for which you are wanting to schedule appointments.

3.4 **Selection** allows you to select a specific type of auto scheduler run.

- **All** runs auto scheduler for <u>all</u> appointment requests in state-defined sort order. This is the option that you will use most often.
- **Recert** runs auto scheduler only for recertification appointment requests in the same sort order. This selection could be run first if you are concerned you might not have enough recertification or mid-certification health assessment appointments for the month.
- **New Pregnant** runs auto scheduler only for new pregnant appointments requests.
- **Pick Up** runs auto scheduler only for food instrument pick up appointment requests.
- **Class** runs auto scheduler only for group nutrition education class requests.
- **Group Screen** runs auto scheduler only for group screening requests.
- **Wait List** runs auto scheduler only for clients who are on the Appointment Needed wait list.

♬ Note: The autoscheduler will group requests for the appointment types "**MI,**" "**MC**" and **"MW"** with recertification appointment types. This means that if you select "**Recert**" the autoscheduler will attempt to book all "**MI,**" "**MC**" and "**MW**" types appointment requests along with those starting with an "**R.**"

4. **Enter the information for the clinic for which you are requesting an Auto Scheduler run.**

   The information on this screen can be modified at any time up until the evening that the auto scheduler is scheduled to run.

5. **Click "Save."**

6. **To delete an auto scheduler request, select that row and click on the "Remove" icon.**
Once Auto Scheduler has run, the system will fill in the information for the "Auto Schd Run No" and "Auto Schd Run Date". These rows can be left on screen to provide a history of the Auto Scheduler runs or can be deleted by the user at any time.

7. **To enter information for another clinic in the agency, select that clinic, click the "Retrieve" button, and enter the request information.**

8. **Click "Save" and exit.**

Auto Scheduler Sort Order and Exceptions

Sort Order

The sort order is designed to maximize the auto scheduler's use of available appointment slots:

- High risk families of 3 with the most complex requests are scheduled first.
- Next all remaining high risk clients are scheduled.
- After this, multiple family members with multiple requests are scheduled, and so on down to individual appointments.
- Group Nutrition Education appointments are scheduled separately.
- The auto scheduler will match first to the exact appointment type if you have specified a non-generic appointment type in your template. When there are no exact matches available, it will match to the appropriate generic appointment type.

Family Size

You can set the maximum family size to either 2 or 3 in the Agency/Clinic Information screen in Operations/Management. The default is three. See this lesson for additional information on setting this field.

- If one client in a family has a request for a high-risk appointment, all family members with requests for that same month will be scheduled as high risk.

Exceptions

There are situations that are “exceptions” where the auto scheduler is unable to match the request criteria to the existing open appointment slots:

- If a family larger than three members has requests in the same month.
- If two or more family members with requests in the same month have conflicting preferences.
- If a participant has both an individual appointment request and group appointment request in the same month.
- If there is no match available for the client’s preferences.
- If the request is marked “Inactive”, the autoscheduler will skip that request and not book it. Inactive requests will not show up on the “**Autoscheduler Unable to Schedule**” report.

Additional Information

- The system has background edits to match the appointment type to the client’s category before it books the appointment, but if the client’s category changes after the appointment request is made or the appointment is booked, the system will not edit.
- The request records for those clients being auto-terminated will be made “inactive” when termination takes place during the End of Day (e.g. missing proofs) or End of Month (e.g. one month past due for cert) processes.
- When searching for an appointment for a client who needs an interpreter, as indicated in their preferences, the system will first search for a staff member whose language matches the client’s needs. If no match can be found, the appointment will be booked with an English speaking staff person and the appointment flagged as “Interpreter needed - Yes”.
- The Automatic Scheduler can be rerun an unlimited number of times.
- An **“Auto Scheduler Unable to Schedule”** report will be created for any appointments with parameters which are unable to be scheduled.

Using the Auto Scheduler Reports

In order for the automatic scheduler to be most useful to you it is important that you take advantage of the “schedule planning” reports TWIST provides. These reports include:

- The “**Projected number of individual appointment requests**” report that will allow you to determine the total number of clients needing an appointment in a given month and allow you to schedule adequate staff to cover the necessary appointments.

- The “**Projected number of group education class requests**” report provides the same information as the “projected number of individual appointment requests” about the number of clients that need a class during a given time period. Again, you will be able to schedule staff to accommodate client needs more efficiently when you know how many clients need a specific class.
- The “**Interpreter needed**” report will provide you with a list of clients due for an appointment who also will be requiring the services of an interpreter. This will allow you to more efficiently utilize your interpreters.

- “**Auto scheduler unable to schedule**” report that lists all those clients that the automatic scheduler was unable to book. This allows you to add additional appointment times that meet the needs of the clients listed on the report and then re-run the automatic scheduler. You can also simply use the report as a list of clients who were not scheduled and then schedule them manually from the list.

- The “**Register of clients to schedule manually**” report will list all those clients that have an appointment request for a given time period to allow you to schedule them all manually.

(See Job Aid “Appointment Scheduler Reports” for more information.

(See Job Aid “Scheduling Clients with Language Needs” for more information.

Using the Auto Scheduler Unable to Schedule Report

The report has several sections that can be reviewed to help with fine tuning your scheduling or re-running scheduler to assure that all participants are scheduled.

1. To view details, you must first select the "**Run**" you want to see and then select "**Retrieve**":

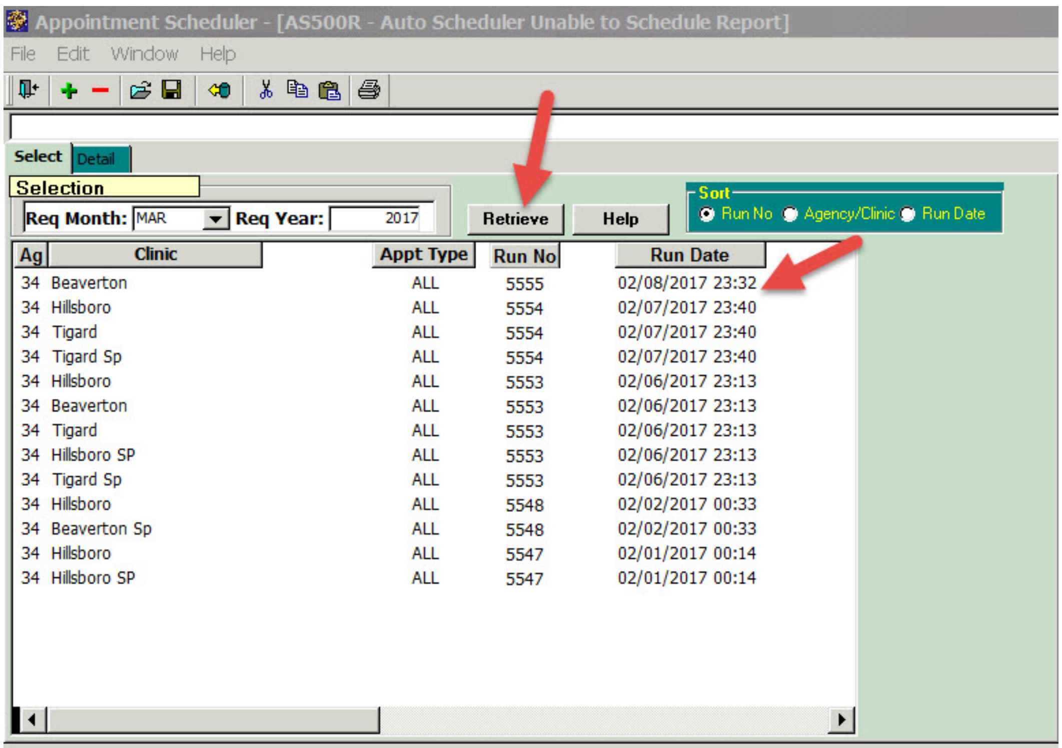

Figure 3: Auto Scheduler Unable to Schedule Report

2. In the "**Details**" section, you can see 3 tabs.

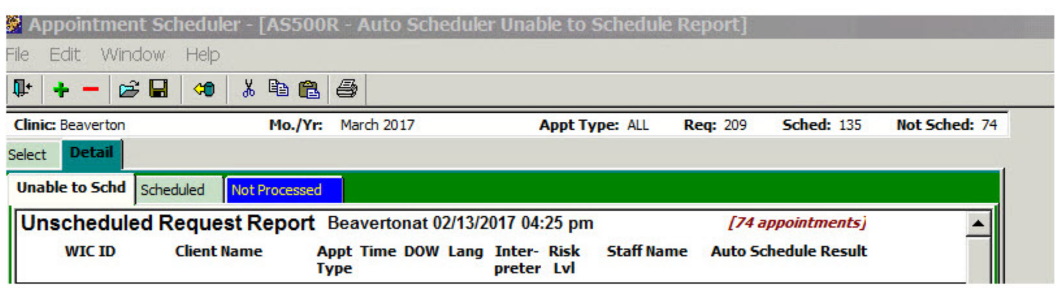

Figure 4: Auto Scheduler Unable to Schedule Report- Details

- **Unable to Schd**: Lists all participants for the run date selected that the auto scheduler could not find an appointment match and why. This is a dynamic report, so as you either manually schedule these participants, or you re-run the auto scheduler and they get scheduled, they will be removed from this tab.
- **Scheduled**: Shows a list of all appointments that were actually scheduled during that autoscheduler run.
- **Not Processed**: *It is important to always review this tab*, as the auto scheduler did not even process these participants for appointments during that run. Reasons for this include that the participant has a request but in either intake or Family Appt. Record, they are indicated as "auto schedule-No" or "Manual only". Requests highlighted in yellow mean that the certifier made the request after the auto scheduler ran for that month, and so the request could not be made. Sometimes it is not really clear why the participant did not get processed, and you will need to look at the record to determine what needs to happen next.

Tips and Shortcuts

- When the "Appointments Auto Scheduler Unable to Book" report lists the appointments which were not scheduled, it may be faster to change the Daily Clinic Schedule by opening more generic appointments as needed and then proceed with the "Run Selection" process rather than to manually schedule each appointment.

- When making requests for multiple family members, there are some important rules to be aware of for different scenarios:

  - **Requests for different individual appointments for 2 or more family members** (e.g. F1, IE, RC) – TWIST will schedule these on same day within 90 minutes as long as there are appropriate appointment slots available in daily clinic schedule within that time frame.

  - **Requests for more than one appt. type for the same person in the same month** (e.g. request for an IE and a GE, or two RC's, for the same person) – TWIST will not schedule these and will kick them out to the "Unable to Schedule" report.

  - **Requests for different appt. types, one for each family member, where one is an individual and one is a group, in same month** (e.g. IE and a GE) – TWIST will schedule these, although not on the same date. (If you are trying to coordinate one family member's individual follow-up with another' family member's GE class, you should schedule these manually at cert/recert appointment.)

- **Requests for two different GE classes for two different family members in <u>same</u> month** (e.g. a Prenatal Class for one and a Kids Club for another) – TWIST will not schedule these and will kick out on Unable to Schedule report as "conflicting preferences". If you want to do this, these should be manually scheduled.

- There are no Fast Paths from the Automatic Scheduler function.

Notes:

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Chapter 4: Appointment Scheduler
Section 3: Automatic Scheduler
Lesson: Appointment Requests

Objectives:

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

- set up appointment requests;
- set up appointment requests for a client with preferences;
- explain the business rules and messaging of the appointment request;
- set up requests for coordinated family appointments; and
- change an appointment request.

Overview:

In order to ensure that families can attend their appointments, we need to provide them with appointment times that fit their busy schedules. Appointment requests allow you to set up a client record incorporating a family's appointment preferences, and then make appointments using the Automatic Scheduling function.

When an appointment request has been saved in the system and the Automatic Scheduler is run, the system automatically matches the client to an appointment that meets whatever requests and preferences the client has made, which could include day of week, time, staff member, skill level, language or interpreter needs, etc. If an appointment cannot be found that matches the client's needs, an exception list is printed out in the Autoscheduler Unable to Schedule report, so that the appointment can then be manually scheduled or the daily schedule can be adjusted to accommodate the preferences.

Appointment requests can be made months in advance. This allows you to schedule up to three family members together. When a client is certified, TWIST will automatically create an appointment request for the next recertification appointment. TWIST will also automatically create a request for a mid-certification health assessment depending on infant's age at enrollment.

TWIST will make certain future appointment requests "inactive" in certain situations. The appointment types include any follow-up, GE or IE appointment requests in the following situations:

- When a client is transferred within Oregon,
- when a client is terminated either manually or automatically, or
- when a breastfeeding woman (WE or WB) changes category to a non-BF woman (WN).

When a request is inactive, the auto scheduler will not schedule it. If the client is reactivated, the "inactive" flag will automatically be removed from the request and the request will be available to be auto scheduled. In the above situations, any future recert or mid-cert assessment requests will be removed and then re-created if the client is reactivated. Clients who transfer out of state and deceased clients will have all future requests removed.

Instruction:

Reviewing the "Family Appointments" Screen

1. **Double click on the "Appointment Scheduler" icon.**
2. **Click "Scheduling" on the menu bar.**
3. **Click "Family Appointment Records."**

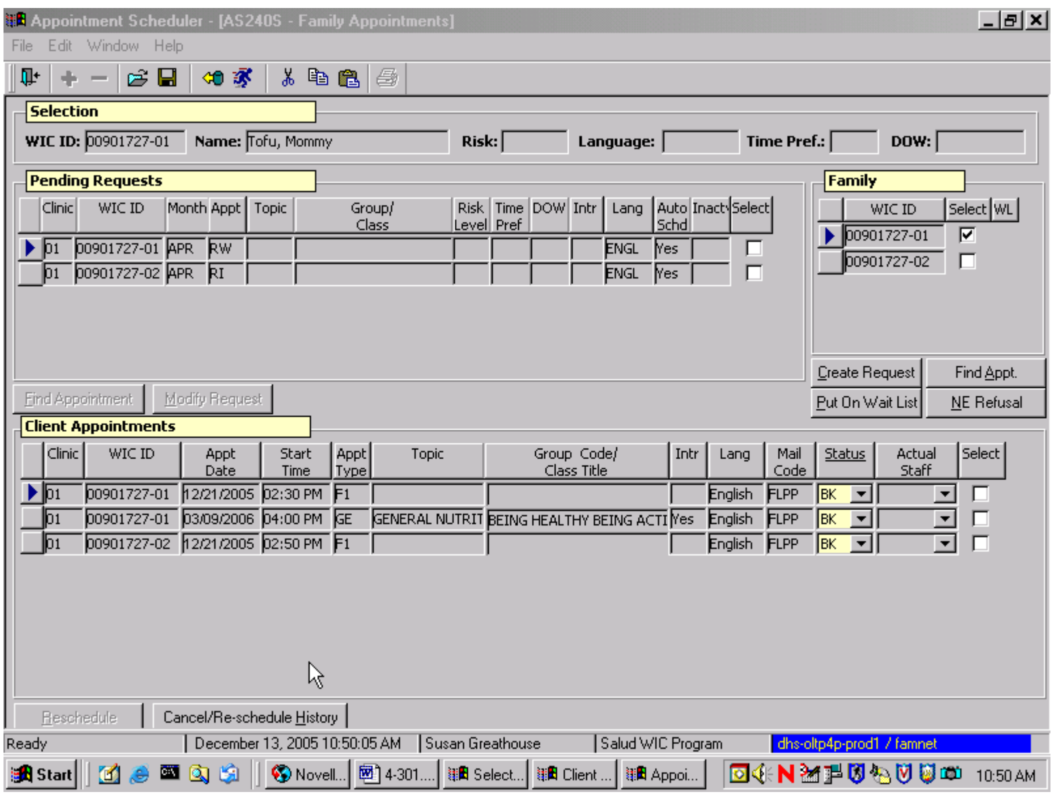

Figure 1: "Family Appointments" Screen

There are four sections to the "Family Appointments" screen: "**Selection**," "**Pending Requests**," "**Family**," and "**Client Appointments**."

- The "**Selection**" section displays the Client's "WIC ID," "Name," and, if known, "Risk," "Language," and appointment preferences for "Time Pref." and "DOW" (day of week).

- The "**Pending Requests**" section shows any appointment requests currently pending. We will review this section in more detail later.
- The "**Family**" section displays the "WIC ID" of any family members on WIC, and allows you to select a specific client in order to create a request, put them on a wait list or find them an appointment. We will also discuss this section later in this lesson.
- The "**Client Appointments**" section displays scheduled appointments for all the family members on WIC.

Creating an Appointment Request

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Family Appointment Records

1. **Retrieve the client for whom you wish to create a request.**

2. **In the "Family" section, click the "Select" check box corresponding to the client for whom you want to make an appointment request.**

    - You may select more than one family member at a time.
    - When you click the "Select" check box, the "Create Request," "Find Appt," "Put on Wait List", and "Refused" buttons are activated.

♫ NOTE: All family members need an appointment request for the same appointment types (either all group or all individual) in the same month in order for the Automatic Scheduler to coordinate family appointments.

3. **Click the "Create Request" button to open the "Appointment Request" pop-up.**

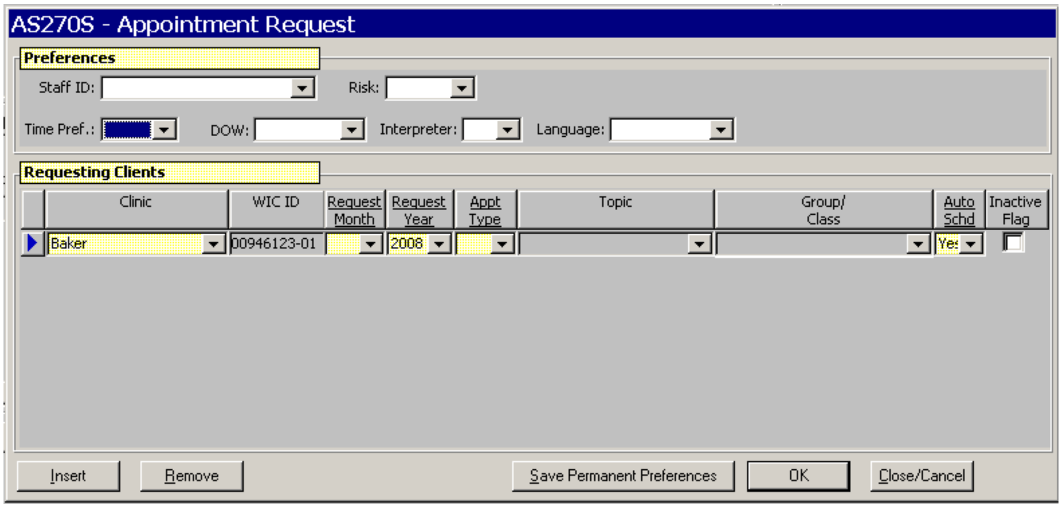

Figure 2: "Appointment Request" Pop-Up

In the "**Preferences**" section, you may enter any preferences you want associated with this request, and they will be used to book this request only. These are called "one time only preferences." If you want to save these preferences in the client's record for future appointments, click the "Save Permanent Preferences" button.

3.1 **Tab to the "Staff ID" field and select the appropriate staff person from the drop down list.**

This field is only used if a particular staff person must see this client.

3.2 **Tab to the "Time Pref." field and select AM, PM or EVE from the drop down list.**

3.3 **Tab to the "DOW" field and select the preferred day of the week for this family's appointments.**

3.4 **Tab to the "Interpreter" field and indicate if an interpreter is required for this family.**

Use this field if the spoken language in client primary is not one the client wants to speak during their appointment and an interpreter will be needed, or if there is no staff person who speaks the client's language.

3.5 **Tab to the "Language" field and select the correct language from the drop down list.**

Use this field when the spoken language in the client primary is not one the client wants to speak during their appointment.

3.6 **Tab to the "Risk" field and select the appropriate risk from the drop down list.**

The system will not assign risk for the appointment. The WIC Staff member making the appointment will need to be aware of the risk level of the client when making the appointment.

3.7 **Click the "Save Permanent Preferences" button at the bottom of the pop-up to save the preferences.** This will save the preferences you have selected for this appointment to apply to all future requests. Otherwise the preferences you have selected will apply only to this appointment request.

- Using the "Save Permanent Preferences" button establishes these preferences for all family members.

4. **In the "Requesting Clients" section, the client's assigned "Clinic" and "WIC ID" is displayed.**

   - The "Clinic" field can be changed if the client needs to have an appointment in a clinic other than the one to which they are assigned.

5. **In the "Request Month" field, select the month for the appointment from the drop down list**.

6. **In the "Request Year" field, select the year the appointment is to be scheduled in from the drop down list.**

7. **In the "Appt Type" field, select the type of appointment from the drop down list.**

   - If the appointment type entered is "GE," the "**Topic**" and "**Title**" fields becomes activated and a topic and title must be selected from the drop down list.
   - If the appointment type selected is "GS," the "**Group/Class**" field becomes activated and an appointment type must be selected from the drop down list.

♫ NOTE: The "**Auto Schd**" field defaults to "Yes" to indicate that the appointment is to be booked using the Automatic Scheduler function, but the user may use the drop down list to select “No.” The “**Inactive Flag**” checkbox is automatically checked by the system when a client is termed mid-cert and the check mark is automatically removed when the client is reactivated.

8. **Click “OK” to close pop-up and save the request.**

   After clicking “OK” and returning to the “Family Appointments” screen, the appointment request data is now displayed in the “Pending Requests” section of the screen.

   The “Cancel” button will allow you to close the pop-up without saving the appointment request.

♫ NOTE: Saving a permanent appointment preference for any family member affects every family member, as it is a family appointment preference. You do not need to select all family WIC IDs to have changes occur, any one member will suffice.

Modifying an Appointment Request

The starting point for this section is:
Appointment Scheduler ⇨ Scheduling ⇨ Family Appointment Records

1. **In the “Pending Requests” section of the “Family Appointments” screen, click the “Select” check box corresponding to the appointment to be modified.**

   The “Find Appointment” and “Modify Request” buttons are now activated.

2. **Click the “Modify Request” button.**

   The “Appointment Request” pop-up is displayed.

3. **Change the appointment request as needed and click the “OK” button.**

   The entire appointment can be deleted by clicking on the “Remove” button.

4. **Exit the “Family Appointments” screen.**

♫ NOTE: You can also manually schedule a request from this screen by selecting the appointment request you wish to schedule and clicking the “Find Appointment” button. Once the request is scheduled, the request is deleted from the “Pending Requests” section and is displayed as a booked appointment in the “Client Appointments” section.

Documenting Nutrition Education Refusal

If the client refuses to attend a secondary nutrition education appointment, you can document that here.

If the client refuses to attend a secondary nutrition education appointment, you can document this using the "**NE Refusal**" button on the Family Appointment Record screen. Refusal for nutrition education can also be documented on the "Non-WIC NE" screen in the certification area.

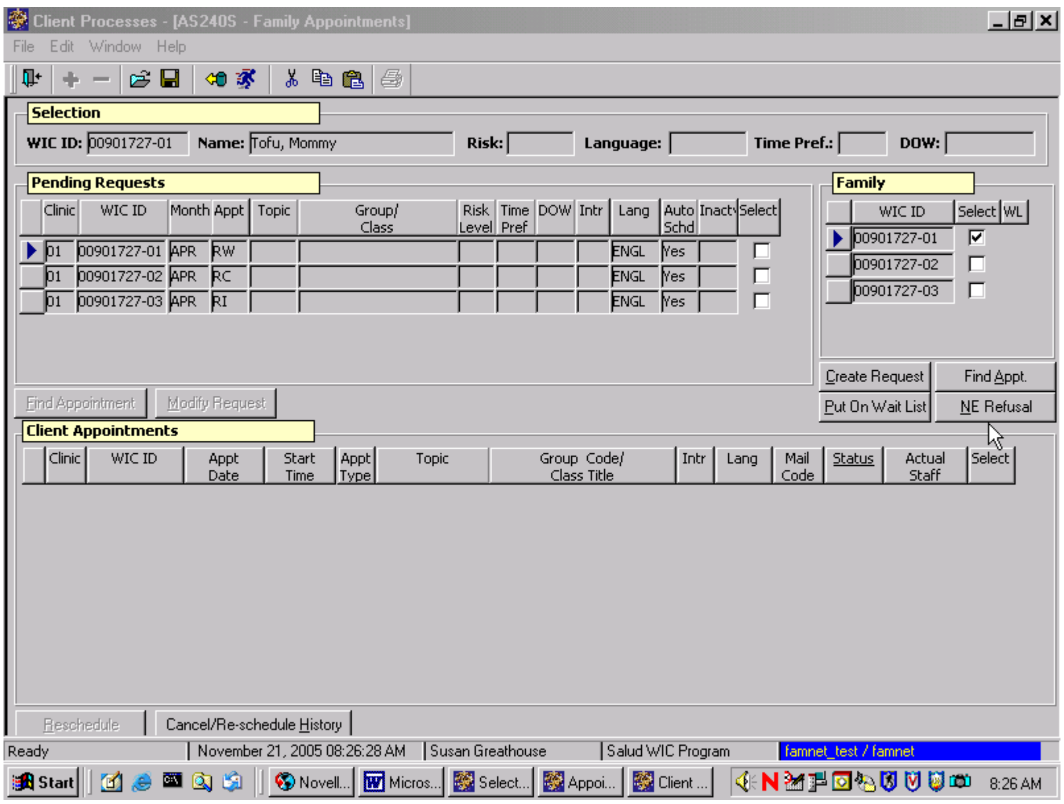

Fig. 3 "NE Refusal" button

This is discussed in more detail in Chapter 3, Lesson 902, *Nutrition Education Refusal*.

✂ Tips and Shortcuts:

Family preferences are used by the Auto Scheduler when coordinating family appointments. If a family has conflicting preferences (e.g. one as AM only and one as EVE only) the Auto Scheduler will not schedule and will appear on the Auto Scheduler Unable to Schedule report. They will need to be manually scheduled, or you will need to adjust your templates/schedules and re-run the

Auto Scheduler. The Auto Scheduler will begin scheduling appointments for those families who have the highest number of preferences first, i.e. the most restrictive preferences are booked first. If one member of a family has a high risk appointment request, then all family members scheduled for that same month will be scheduled with a high risk staff person. If you do not want this to be the case, then the appointments for that particular family should be manually scheduled.

✍ ***Notes:***

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Chapter 4: Appointment Scheduler
Section 3: Automatic Scheduler
Lesson: Coordinating Family Appointments

Objectives:

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

- coordinate family appointments using either the automatic or the manual scheduling options in TWIST.

Overview:

Scheduling and coordinating family appointments in the WIC Clinic allows us to provide better service for our clients as well as helping to streamline and avoid duplicate work for the clinic. TWIST allows us to quickly and easily coordinate family appointments by using the automatic scheduler or to search for consecutive appointment times for family members when using the manual scheduling functions. See also Lesson 3-1100, *Family Summary Screen* for more information on coordinating family appointments and FI issuance.

Instruction:

Automatically Coordinating Family Appointments

The Automatic Scheduler will automatically coordinate appointments for families of three or -fewer. In order for the Automatic Scheduler to be able to coordinate family members' appointments, a request for an appointment must be entered for each family member in the "Create Request" screen. In addition, all family members need an appointment request for the same appointment types (either all group or all individual) in the same month in order for the automatic scheduler to coordinate family appointments.

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Family Appointment Records

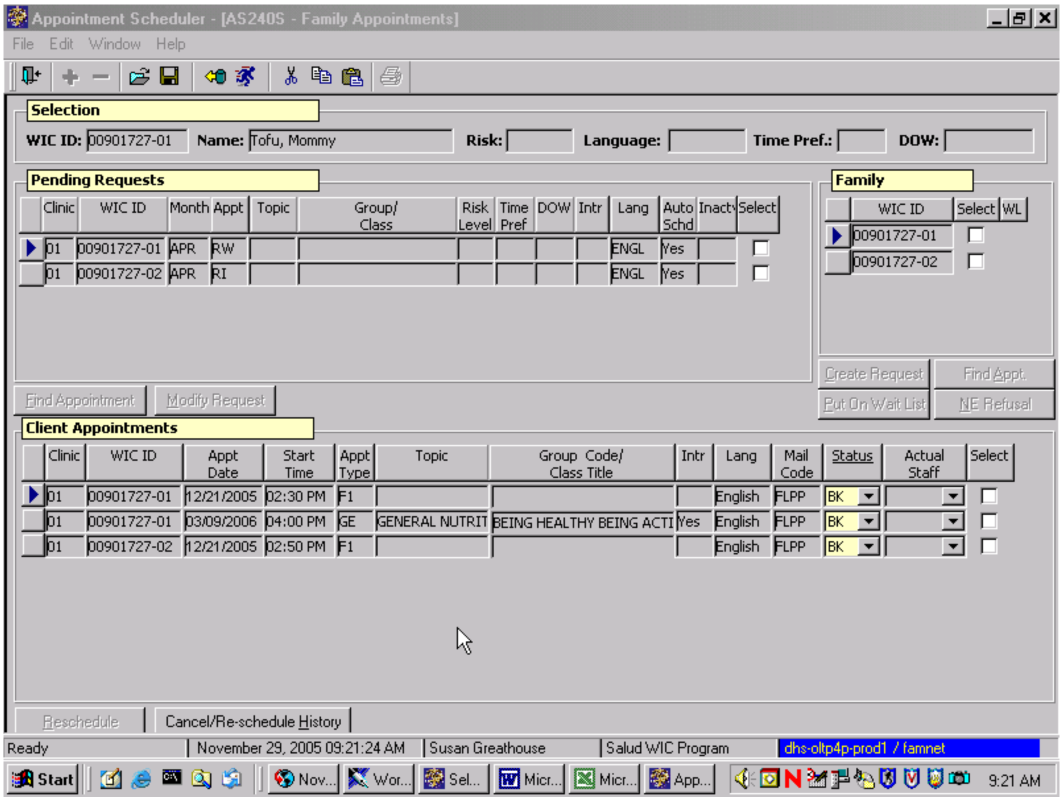

Figure 1: "Family Appointments" Screen

♫ NOTE: Please refer to Chapter 4, Lesson 301, *Appointment Requests* for more detailed information about creating an appointment request and refer to the "WIC Intake" section in Chapter 3, Lesson 100 *Applicant Prescreening* for information on modifying certification dates in order to coordinate family appointments.

1. **Retrieve a client from the family for whom you wish to coordinate appointments.**

2. **In the "Family" section, click the "Select" checkbox corresponding to the clients for whom you want to make coordinated family appointment requests.**

   - You must select all family members for whom you wish to coordinate appointments. Family members must have appointment requests for the same appointment types (group or individual) and for the same month.
   - The system will automatically coordinate families so appointments are with the same staff within 90 minutes or less of one another.

3. **Click the "Create Request" button to open the "Appointment Request" pop-up.**

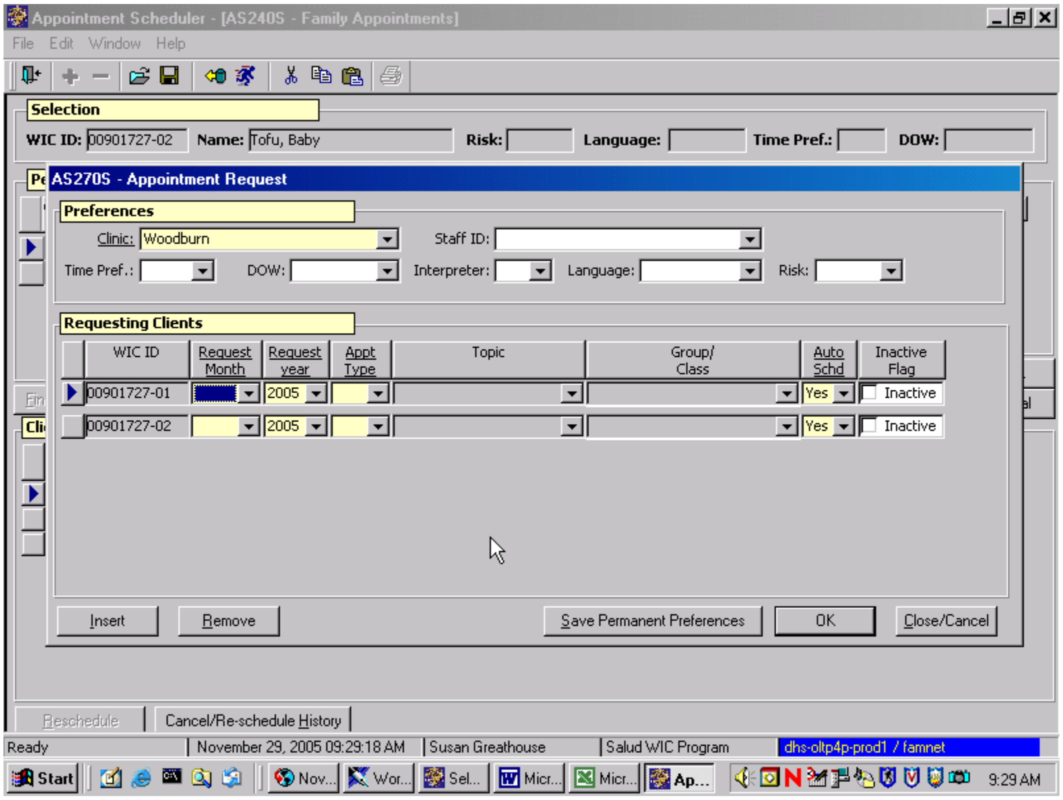

Figure 2: "Appointment Request" Pop-Up

4. **In the "Preferences" section, select the "Clinic" from the drop down list.**

5. **Select any other desired selection criteria.**

   If one family member you are trying to schedule is high risk, this will be the default preference used to book all family members.

6. **In the "Requesting Clients" section, complete the "Request Month," and "Appt Type" fields for each family member.**

   The "Inactive Flag" check box is auto-filled by the system when a participant is termed mid-certification. It is not used when coordinating family appointments.

7. **Click the "OK" button to close the pop-up and save this appointment request.**

   The appointment request data is now displayed in the "Pending Requests" section of the screen.

8. **Exit.**

Manually Coordinating Family Appointments

The starting point for this section is:

Appointment Scheduler ➪ Scheduling ➪ Family Appointment Records

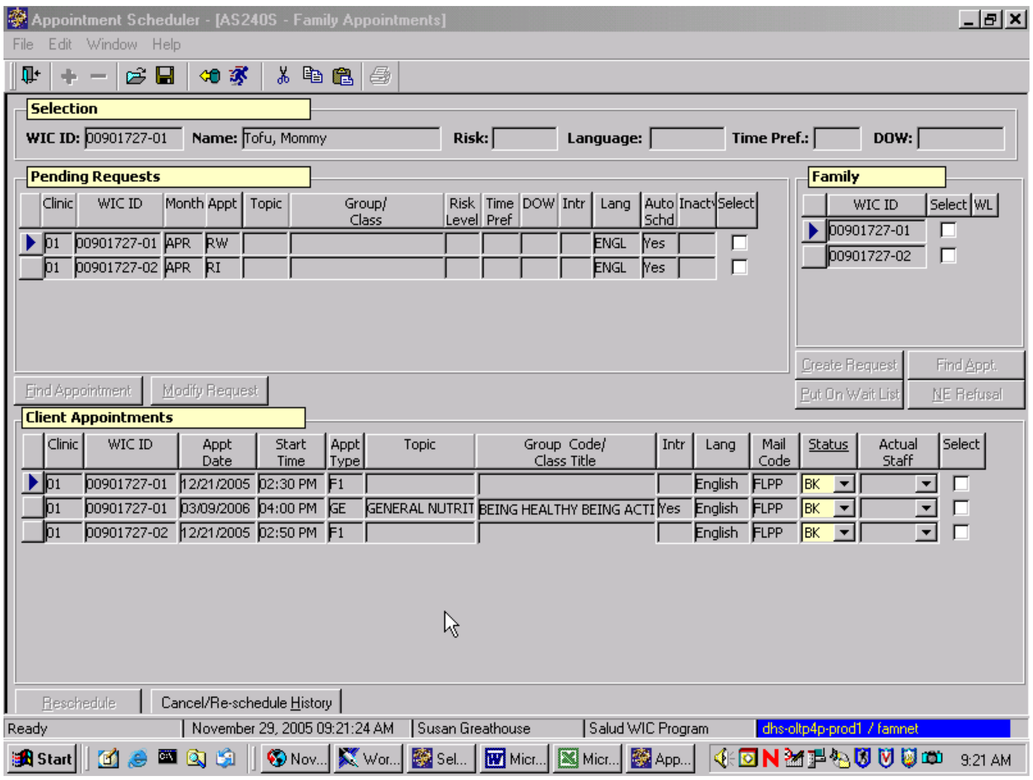

Figure 3: "Family Appointments" Screen

♫ NOTE: Please refer to Chapter 4, Lesson 402 *Schedule Appointment Now* for more detailed instructions on booking manual appointments and refer to the "WIC Intake" section in Chapter 3, Lesson 100 *Applicant Prescreening* for information on modifying certification dates in order to coordinate family appointments.

1. **Retrieve a client from the family for whom you wish to coordinate appointments.**

2. **In the "Family" section, click the "Select" checkbox corresponding to the clients for whom you want to make a coordinated family appointment.**

3. **Click the "Find Appt." button to view the "Find Appointment" pop-up.**

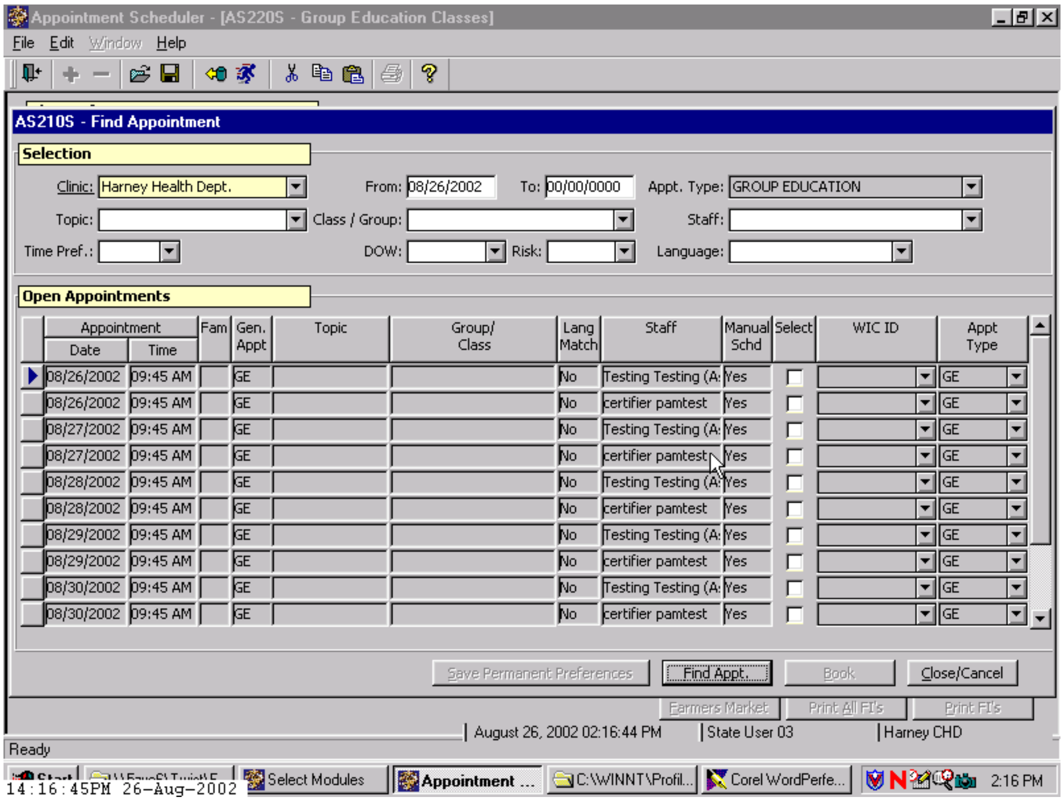

Figure 4: "Find Appointment" Pop-Up

4. **In the "Selection" section, select the "Clinic" from the drop down list.**

5. **Leave "Appointment Type" blank so you can be sure to bring back appointments that match the multiple types needed by the clients.**
6. **Select any other desired selection criteria.**

7. **Click the "Find Appt." button to display the open appointments that meet the selection criteria.**

8. **Search the open appointments for the number of consecutive appointments needed for the family appointments.**

   Make certain to select appointments for all family members with the same staff person.

9. **Check the "Select" checkbox next to the desired appointment for the first family member.**

   - Client with the lowest participant number appears in the WIC ID drop down box.
   - Use the drop down to indicate correct participant for appointment type.
   - If the appointment type chosen is a generic appointment type, you will have to enter the real appointment type in the "Appt. Type" field.

10. **Continue by checking the "Select" checkbox for the next desired appointment time.**

    - Click on the WIC ID field and select the correct client as necessary.
    - Indicate real appointment type as necessary if generic appointment type slots are chosen.

11. **Click the "Book" button to schedule the appointments and close the pop-up.**

    The "**Client Appointments**" section of the "**Family Appointments**" screen is now populated with the scheduled appointment information.

12. **Exit.**

♫ NOTE: These same functions can also be done in the Family Summary Screen section. See Chapter 3, Lesson 1100, *Family Summary Screen* for more information.

✍ ***Notes:***

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Chapter 4: Appointment Scheduler
Section 4: Scheduling Appointments
Lesson: Family Appointment Record

Objectives:

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

- maneuver between the “Family Record” screen, “Find Appointment” screen, “Appointment Request” screen and “Client Search” screen and understand how they interrelate; and
- read and understand all sections on the “Family Record” screen.

Overview:

The “Family Appointment Records” screen is the focal point of all searches, creating appointment requests and booking appointments throughout the Appointment Scheduler area. This screen allows you to view all family members’ appointment records on a single screen which makes it quick and easy to find appointment details for all family members, coordinate family appointments, manually schedule appointments or create appointment requests. A history of canceled and rescheduled appointments is also available from this screen.

Instruction:

Reviewing “Family Appointment Records” screen

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Family Appointments

1. **Select “Family Appointment Records.”**

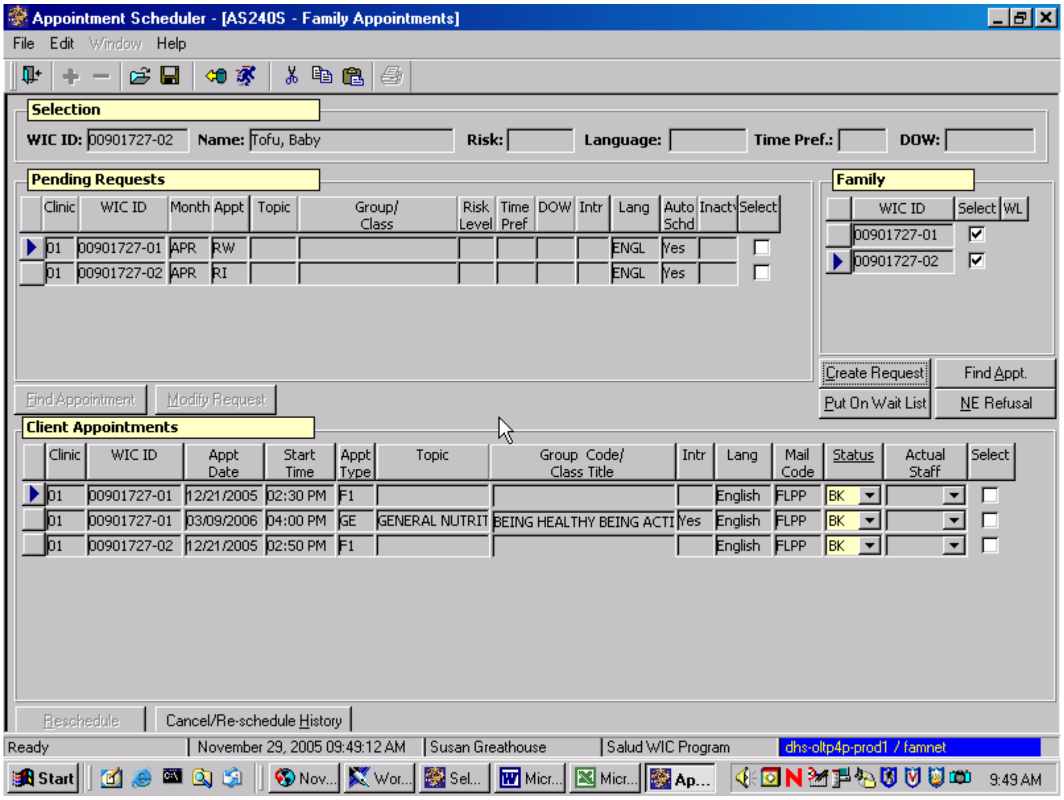

Figure 1: "Family Appointment Records" Screen

There are four sections to the "**Family Appointment records**" screen, "**Selection**," "**Pending Requests**," "**Family**" and "**Client Appointments**."

2. **Search for and return with client to "Family Appointment Records" screen.**

2.1 The "**Selection**" section displays the "**WIC ID**," "**Name**" and, if known, "**Risk**," "**Language**" and appointment preferences for "**Time Pref**." and "**DOW**" (day of week).

2.2 The "**Pending Requests**" section shows any appointment requests currently pending.

- "**Clinic**" displays the clinic where the appointment request is to be scheduled.
- "**WIC ID**" displays the WIC ID of the family member to be scheduled.
- "**Month**" displays the month the appointment request is to be scheduled in.

- "**Appt. Type**" displays the type of appointment to be scheduled.
- "**Topic**" displays the code for the class topic if the appointment type is "**GE**." (Group Education). If the appointment type is other than "GE" this field will be blank.
- If the appointment type is "GE", the title of the class will display in the "**Group/Class**" field. If the appointment type is "GS" (Group Screen) the real appointment type for the group screen will display. If the appointment type is other than "GE" or "GS" this field will be blank.
- "**Time Pref**" displays time preference associated with the specific appointment request. If no time preference, the field will be blank.
- "**DOW**" displays the day of week preference associated with the specific appointment request. If no day of week preference, the field will be blank.
- If the user has indicated that an interpreter is needed for the appointment requested, the "**Intr**" field will display "yes." If an interpreter has not been indicated, the field will be blank.
- If the user has indicated a language other than the client's usual spoken language for a specific request, it will display in the "**Lang**" field.
- The "**Auto Sched**" field indicates whether or not the auto scheduler is intended to schedule the appointment request.
- When the user clicks the "**Select**" box beside a specific request, the "**Find Appointment**" and "**Modify Request**" buttons become enabled. The "**Find Appointment**" button takes the user to the "Find Appointment" screen to schedule an appointment for the specific request. The "**Modify Request**" button takes the user to the "Appointment Request" screen where the request the user selected is available for modification.

2.3 The "**Family**" section displays the "**WIC ID**" of any family members on WIC, and allows you to select a specific client in order to create a request, put them on a wait list or find them an appointment. When the "**Select**" check box for a family member is chosen, the "**Create Request**," "**Find Appointment**," "**Put on Wait List**," and "**NE Refusal**" buttons are activated.

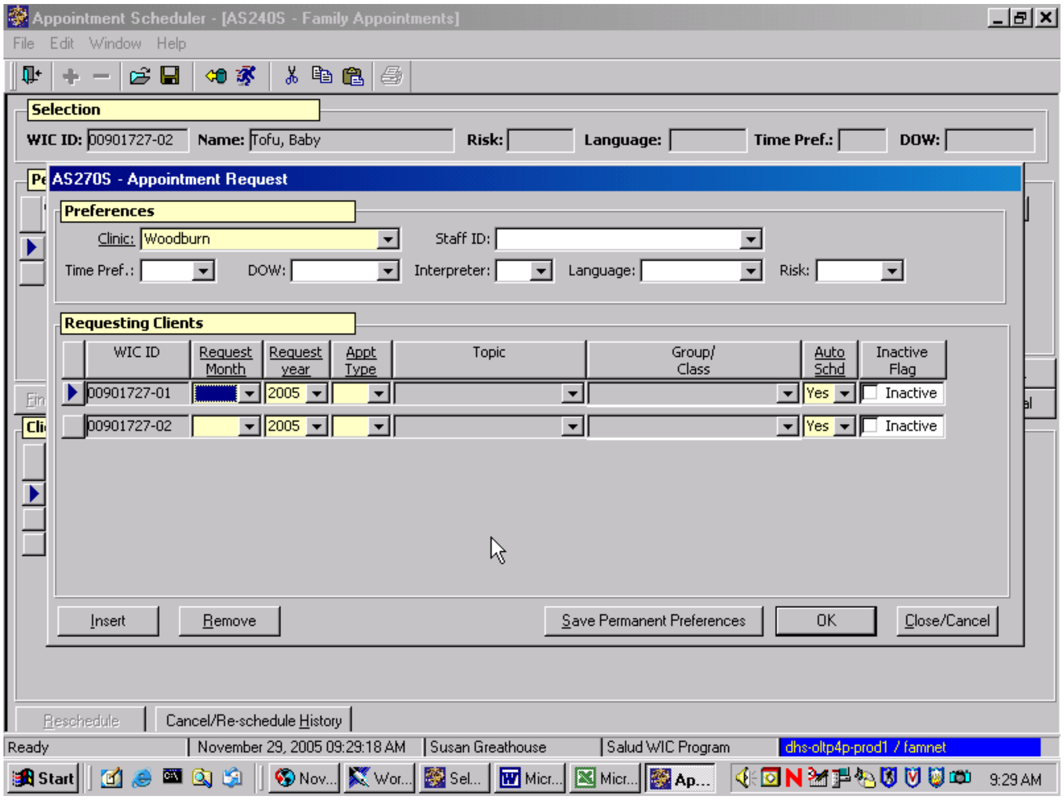

Figure 2: "Appointment Request" Screen

- The "**Create Request**" button takes the user to the "Appointment Request" screen for an appointment request to be created. Up to three family members may be selected at a time.

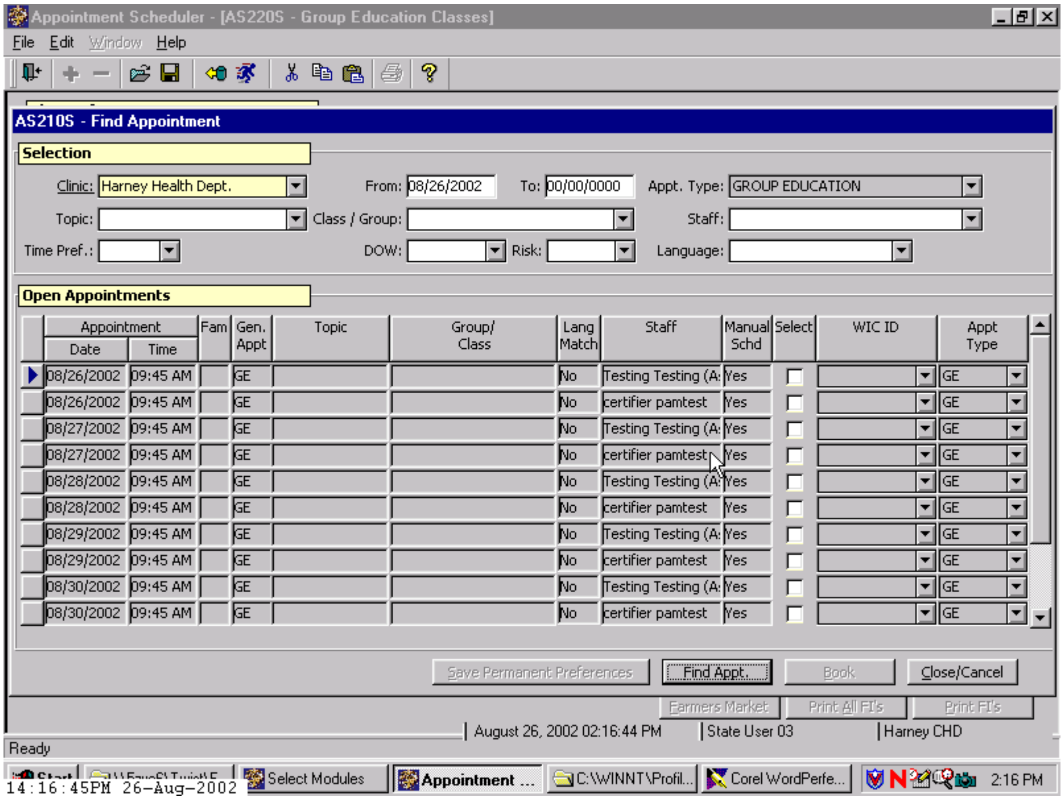

Figure 3: "Find Appointment" screen

- The "**Find Appointment**" button takes the user to the "Find Appointment" screen to schedule an appointment. Up to three family members may be selected at a time to schedule appointments for.
- The "**Put on Wait List**" button will take the user to a pop -up screen to choose which wait list to place client on. Only one family member at a time may be placed on the wait list.
- The "**NE Refusal**" button brings up a pop-up screen for user to document participant refusal to attend a second NE contact.

2.4 The "**Client Appointments**" section displays scheduled appointments for all the family members on WIC. From this area an existing appointment can be rescheduled, and the user can view the family's appointment cancel/reschedule history. Past appointments are archived off of this area 11 months after the appointment was last modified.

- "**Clinic**" displays the clinic the appointment is scheduled in

- "**WIC ID**" displays the ID number of the family member scheduled. Data in this column can be resorted by clicking on the column heading.
- "**Appt. Date**" displays the date of the scheduled appointment. Data in this column can also be resorted by clicking on the column heading.
- "**Start Time**" displays the start time of the appointment.
- If the local agency is using family precoding, the "**Fam**" field will display an "F" in the appointment was scheduled into a slot that was open for family coordination.
- "**Topic**" displays the class topic if the appointment type is "GE." (Group Education). If the appointment type is other than "GE" this field will be blank.
- If the appointment type is "GE", the title of the class will display in the "**Group/Class**" field. If the appointment type is "GS" (Group Screen) the real appointment type for the group screen will display. If the appointment type is other than "GE" or "GS" this field will be blank.
- If the user has indicated that an interpreter is needed for the scheduled appointment the "**Intr**" field will display "yes." If an interpreter has not been indicated, the field will be blank.
- If an interpreter is required for the scheduled appointment, the client's spoken language will display in the "**Lang**" field. If an interpreter is not required the field will be blank.
- "**Mail Code**" displays the client's mail code for the month the appointment is scheduled for.
- The "**Status**" field lists the current status of the appointment.
- "**Actual Staff**" is a drop down field that allows the user to document appointment attendance by choosing the name of the staff person who actually saw the client.
- When the "**Select**" box beside a specific appointment is checked, the "**Reschedule**" button is activated. The "**Reschedule**" button takes the user to the find appointment screen to reschedule the appointment selected. When an appointment is rescheduled the old appointment information is captured in the "**Cancel/Reschedule History**" and the appointment is re-opened for use.

♫ NOTE: Only current and future dates can be selected for rescheduling.

The "**Cancel/Reschedule History**" button takes the user to the "Cancel/Reschedule History" screen which displays a six month history of canceled and rescheduled appointments.

Chapter 4: Appointment Scheduler
Section 4: Scheduling Appointments
Lesson: Special User – Group Scheduling

Objectives:

Upon completion of this lesson the user will be able to:
- set up and maintain group nutrition education classes; and
- create and maintain Group Screening appointments.

Overview:

Before you can use the Appointment Scheduler to make appointments for Group Nutrition Education Classes and Group Screenings, you need to complete a few 'background' screens. Classes are set up under specific topics that come from the topics table, which is maintained by the state. Classes are maintained through base tables set up at the local level. You will also need to complete the "Class Locations" table in order to identify where the classes will be held within your agency.

The **"**Group Education Classes**"** screen allows the user to create or display information pertinent to a class. Once this screen is completed and booked into the Daily Clinic Schedule, clients can then be booked into the class either automatically or manually.

"Group Screening" is a way to schedule a group of clients into one appointment type and time frame. The **"**Group Screening**"** screen allows multiple clients to be scheduled as a group appointment. This screen works very much like the "Group Education Classes" screen.

Instruction:

Entering Class Locations

Class locations are entered here so when you are setting up your classes you are able to select a location for the class from a drop down menu. The address you choose when setting up your class is the address that will print on the client's appointment notice. We recommend that you put in an address for each site where you teach classes, including your main clinic sites. If you choose not to do this, however, the location for class will default to the address for the clinic the class was set up in.

The starting point for this section is:

Appointment Scheduler ⇨ Tables ⇨ Class Locations

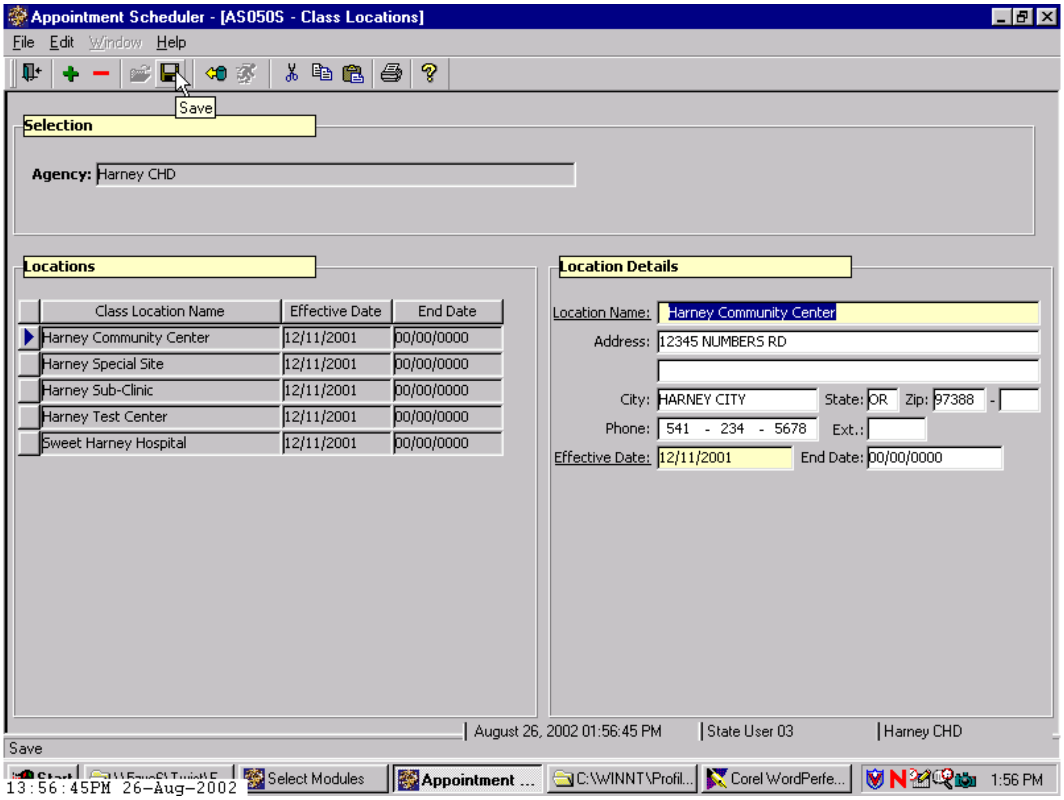

Figure 1: "Class Locations" Screen

- The screen is agency specific.
- The top part of the screen is labeled "**Selection**." The "**Agency**" field displays your local agency based on your log on.
- The bottom left side of the screen is labeled "**Locations**" and displays information input from the "**Location Details**" section.
- The bottom right side of the screen is "**Location Details**." This is where you input information about the class locations.

1. **Enter the "Location Name" for this class location in the "Location Details" section.**

    - When you enter this screen, the cursor will already be located in the "Location Name" field.
    - Click on the "Insert Record" icon to create a blank row for the new Class Location, if necessary.
    - When you tab off the "Location Name" field, the system displays this information in the "Locations" section.

♫ NOTE: To modify an existing location, you must first select that location on the left side of the screen in the "Locations" sections by placing your cursor on the location and clicking.

2. **Tab to the "Address" field and enter the address for this class location.**

   - This address will be printed for the class address on the appointment notices.
   - Complete the address for the class location by entering the "City," "State," and "Zip" fields.
   - If left blank, the physical address for the clinic will print on class appointment notices.

3. **Tab to the "Phone" field and enter the phone number for this location, if desired.**

   - If left blank, the client phone number for the clinic will print on the appointment notices.

4. **Tab to the "Effective Date" field and enter the date this location is effective as a class location.**

   The system displays this information in the "Locations" section.

5. **Tab to the "End Date" field, and enter the last date this location is to be used as a class location.**

   Leave as 00/00/0000 if unknown. The system displays this information in the "Locations" section.

6. **Save.**

7. **Exit.**

➥ *Practice Activity #1:*

Use the information from your Data Entry Document for this practice. You will be entering information about Class Locations for your agency.

The starting point for this activity is:
Appointment Scheduler ⇨ Tables ⇨ Class Locations

1. Click the "Insert Record" icon to create a new blank row.
2. Enter the "Location Name."
3. Tab to the "Address" field and enter the appropriate information.
4. Tab and enter the "City" and "Zip" fields data.
5. Tab and enter the "Phone" number.
6. Tab to the "Effective Date" field and complete.

7. Save and exit.

Entering Nutrition Education Classes

The starting point for this section is:

Appointment Scheduler ⇨ Tables ⇨ Nutrition Education Classes

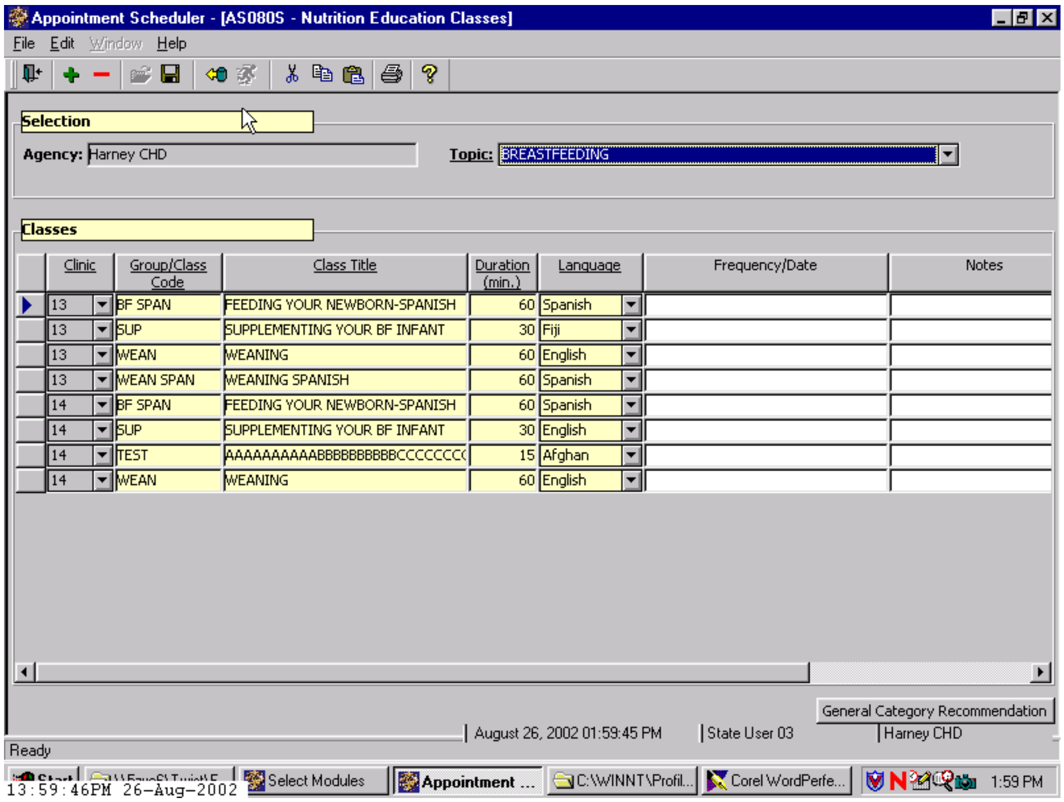

Figure 2: "Nutrition Education Classes" Table

- The top part of the screen is labeled "Selection."
- The "Agency" field displays your local agency based on your log on.

1. **Select the "Topic" for the nutrition education class from the drop down list.**

    - The system will display any nutrition education classes previously entered for this specific topic in the "Classes" section.
    - If there are no education classes displayed in this section, the system will provide a blank line for adding a new nutrition education class.
    - If necessary, click on the "Insert Record" icon to create a new line for entering the new nutrition education class.

2. **Complete the fields in the "Classes" section.**

   2.1 "**Clinic**" designates in which clinic this class is being taught. Select the clinic from the drop down list.

   2.2 "**Group/Class Code**" is the unique code for this class. The user enters the code which may be up to ten alphanumeric characters in length.

   2.3 The user must enter the "**Class Title**," which is the descriptive title for this class.

   - You will want to use the appropriate language in this table when setting up your classes since the class title prints exactly as written on the class appointment notices.

   2.4 "**Duration (min.)**" is the length (in minutes) of the class. This field is used for informational purposes only. The actual duration for the Group Education appointment type is assigned on the Appointment Type Duration Table.

   2.5 Select the "**Language**" in which the class is taught from the drop down list.

   2.6 "**Frequency/Date**" designates how often this class is taught at the selected clinic. For example, "Two times per month" or "The first and third Monday of the month." This field is informational only for staff scheduling the class.

3. **Double click on the "Notes" field.**

   - This field is in an inactive/display mode until you double click.
   - Double clicking will open the "**Notes**" pop-up.

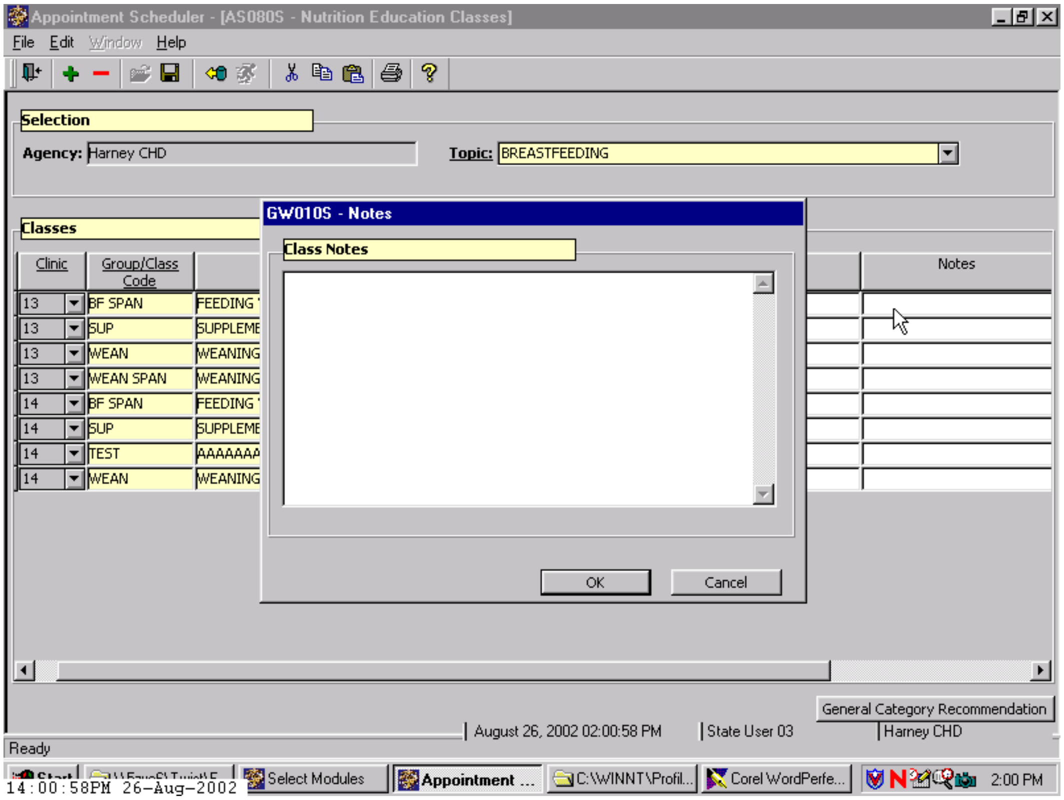

Figure 3: "Notes" Pop-Up

- You may enter free form notes about the class here.
- Click "OK" to save the notes and return to the "Nutrition Education Classes" screen.
- Click "Cancel" to close the pop-up without saving any data.

4. Scroll to right to see the "**Effective Date**" field, which is used to designate the first day the class is available for use on the Appointment Scheduler. This field must be filled in.

5. Complete the "**End Date**" field only when the class is no longer going to be used on the Appointment Scheduler, as it will prevent the class from being able to be scheduled.

♫ NOTE: If a class has been de-activated by putting in an end date, but you now want to start using the class again, you may change the effective date and delete the end date. This will allow the class to once again be scheduled.

6. **Save.**

Once the "Nutrition Education Classes" data is saved, the "General Category Recommendation" button in the lower right hand corner of the screen is activated.

7. **Click the “General Category Recommendation” button to bring up the “General Category Recommendation” pop-up**.

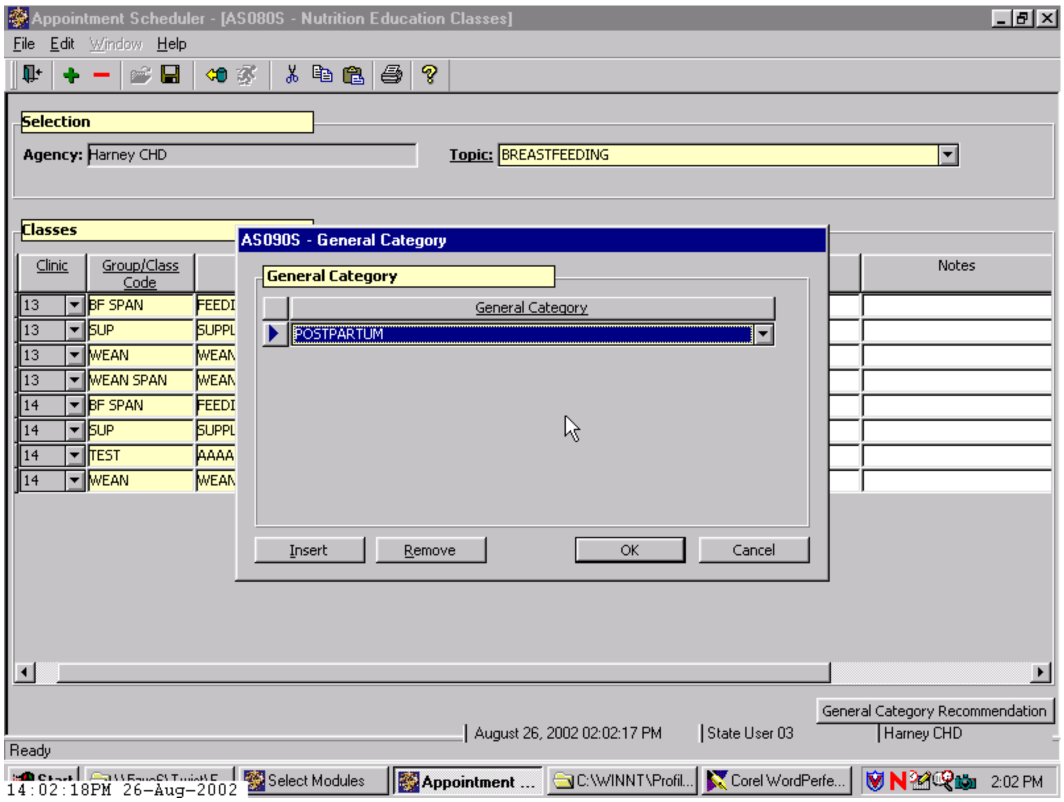

Figure 4: “General Category Recommendation” Pop-Up

This pop-up allows you to select which categories are recommended for each class.

♫ NOTE: Assigning recommended categories to a class here will cause those classes most pertinent to a client’s category to list first when scheduling a client into a class.

8. **Select a category from the drop down list.**

- The “Insert” and “Remove” buttons allow you to add more categories or delete categories not recommended for this class.
- The “OK” button will save the information and close the pop-up.
- The “Cancel” button will close the pop-up without saving the information.

9. **Save.**

10. **Exit.**

➥ *Practice Activity #2:*

Use the information from your Data Entry Document for this practice. You will be entering information about Nutrition Education Classes for your agency.

The starting point for this activity is:

Appointment Scheduler ⇨ Tables ⇨ Nutrition Education Classes

1. Select the “Topic” for the nutrition education class from the drop down list.
2. Click the “Insert Record” icon, if needed, to create a new line for your class.
3. Select the “Clinic” for this class from the drop down list.
4. Tab to the “Group/Class Code” field and enter the code.
5. Tab to the “Class Title” field and enter the descriptive title for the class.
6. Tab to the “Duration (min)” field and enter the descriptive title for the class.
7. Tab to the “Language” field and select the language from the drop down list.
8. Tab to the “Frequency/Date” field and enter this data, if appropriate.
9. Tab to the “Notes” field and double click on this field to display the “Notes” pop-up window.
10. Enter any applicable notes for this class.
11. Click “OK” to close the pop-up.
12. Tab to the “Effective Date” field and enter the effective date for this class.
13. Save.
14. Click the “General Category Recommendation” button to bring up the “General Category” pop-up.
15. Select a “Category” from the drop down list.
16. Select any additional categories recommended for this class.
17. Click the “OK” button to close the pop-up.
18. Save and exit.

Next, we are going to work on setting up the classes and booking them into the “Daily Clinic Schedule.” There are two ways to add a class into the daily clinic schedule. One way is through the “Group Education Classes” screen, and the other is from the “Daily Clinic Schedule” itself.

Booking a Group Education Class into the Daily Clinic Schedule via “Group Education Classes” Screen

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Group Maintenance ⇨ Group Education Classes

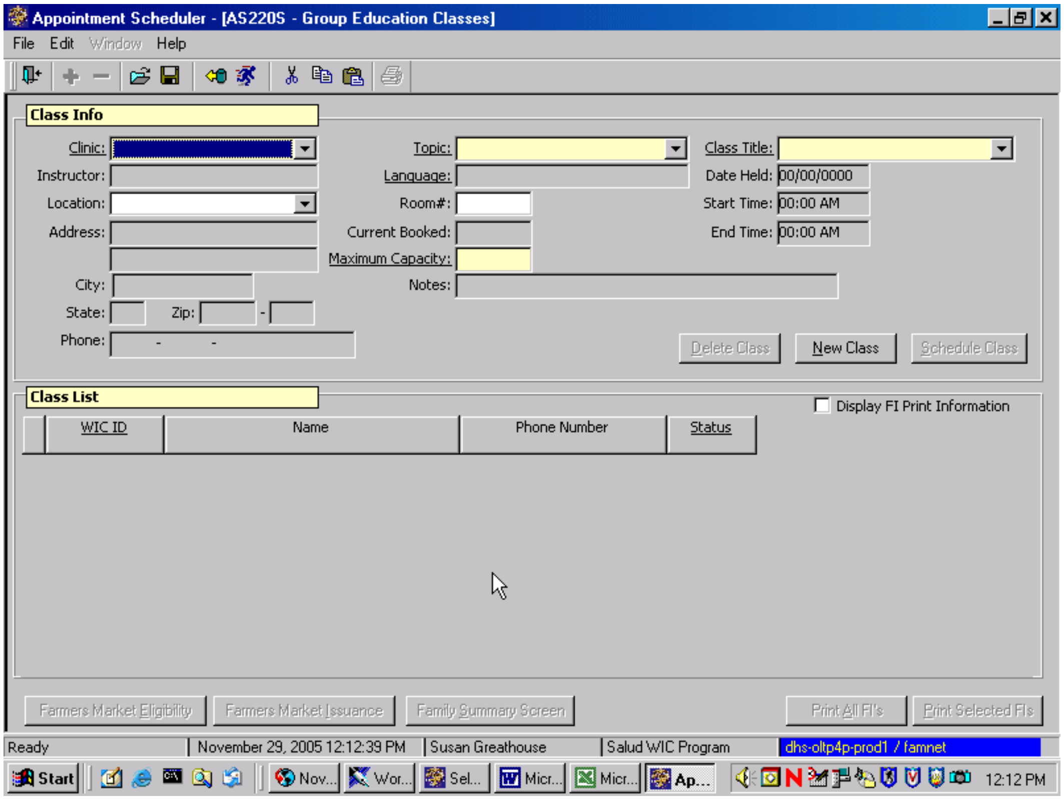

Figure 5: "Group Education Classes" screen

The top part of the screen is "Class Info" and is used to set up the classes at a clinic location and to book the class into the "Daily Clinic Schedule."

1. **Complete the mandatory and optional fields in the "Class Info" section.**

   1.1 Select the "**Clinic**" where the class is to be held from the drop down list.

   1.2 Tab to the "**Topic**" field and choose the topic for the class from the drop down list.

   1.3 Tab to the "**Class Title**" field and select from the drop down list.

   1.4 Tab to the "**Location**" field. Once you have selected the location from the drop down list, the address and phone number fields will be filled in with the information you entered on the "Class Locations" table.

   - The "**Location**" field will default to the clinic location if you don't select a location here.

1.5 Tab to the "**Room #**" field, and enter the room number where the class will be held, if appropriate.

- The "**Current Booked**" field displays the number of clients currently scheduled for this class. This is filled in by the system as clients are scheduled.

1.6 Tab to the "**Maximum Capacity**" field and enter the maximum number of clients for attending this class.

♫ NOTE: Setting maximum capacity will indicate the total number of clients who can attend the class. This number will need to be set approximately two times higher than the number you really want to attend the class to take into account the fact that all family members may have a class scheduled, and all will get class credit, only the parent/guardian may actually attend.

♫ NOTE: When maximum capacity is reached you will receive an error message when you attempt to schedule someone into the class. If you want to increase the maximum capacity, you will need to go back into the "**Group Education Classes**" screen and change it.

1.7 Tab to the "**Notes**" field and enter any free form notes for this class. The field works the same way at the other "Notes" field previously described.

2. **Save.**

♫ NOTE: If you are not ready to actually schedule the class to a specific date, time and staff, you can stop here. In order to find a class that has been set up, but not yet scheduled, a search screen can be accessed from this screen by clicking on the "Open" icon.

3. **Click the "Schedule Class" button to display the "Find Appointment" pop-up.**

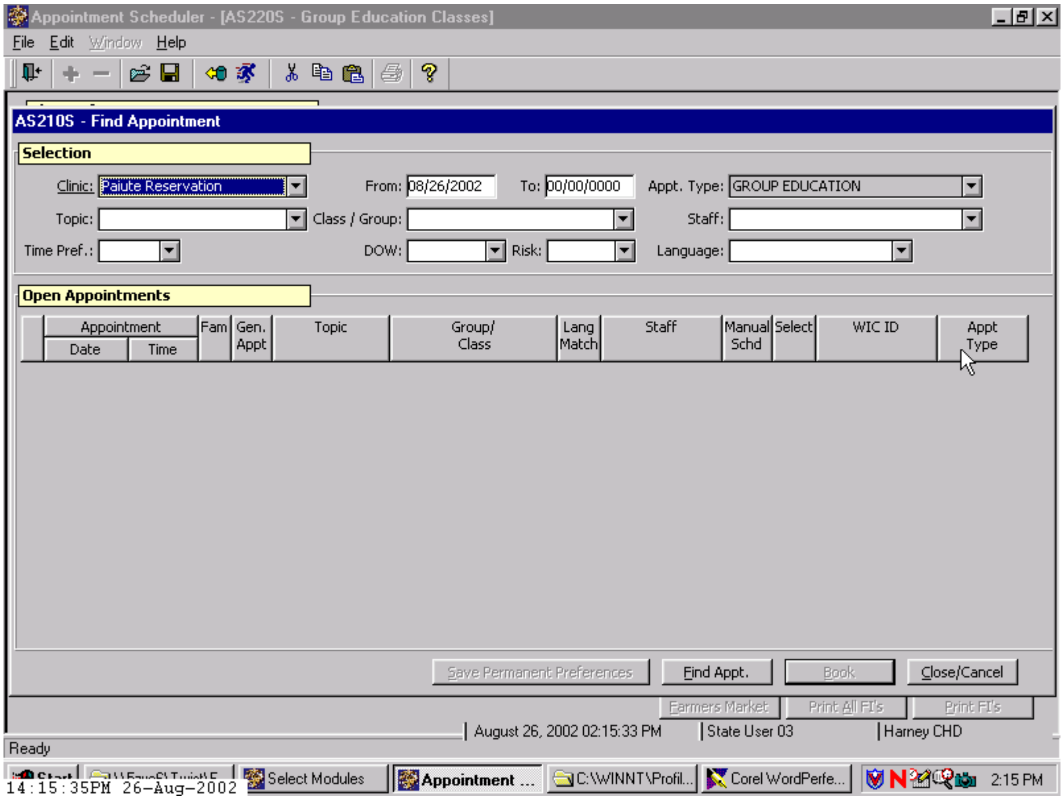

Figure 6: "Find Appointment" Pop-Up

The "Find Appointment" pop-up is used to search for available times to book the class into the "Daily Clinic Schedule."

3.1 In the "**Selection**" section, the system displays the Clinic from the "Group Education Classes" screen.

3.2 The "**From**" field defaults to today's date, but you may change this date to another date in the future.

3.3 The "**To**" field defaults to 00/00/0000, but you may enter a specific end date on which the system should search the Daily Clinic Schedule for available times.

3.4 The system displays the "**Appt. Type**" field as "group education" this cannot be changed.

3.5 To restrict the available appointments search further, you may complete these fields: **Staff**, **Time Pref** (select AM or PM), **DOW (Day of Week)**, **Risk**, **Language**.

3.6 Do not use **Topic** or **Class/Group** as selection criteria.

4. **Click the "Find Appt." button.**

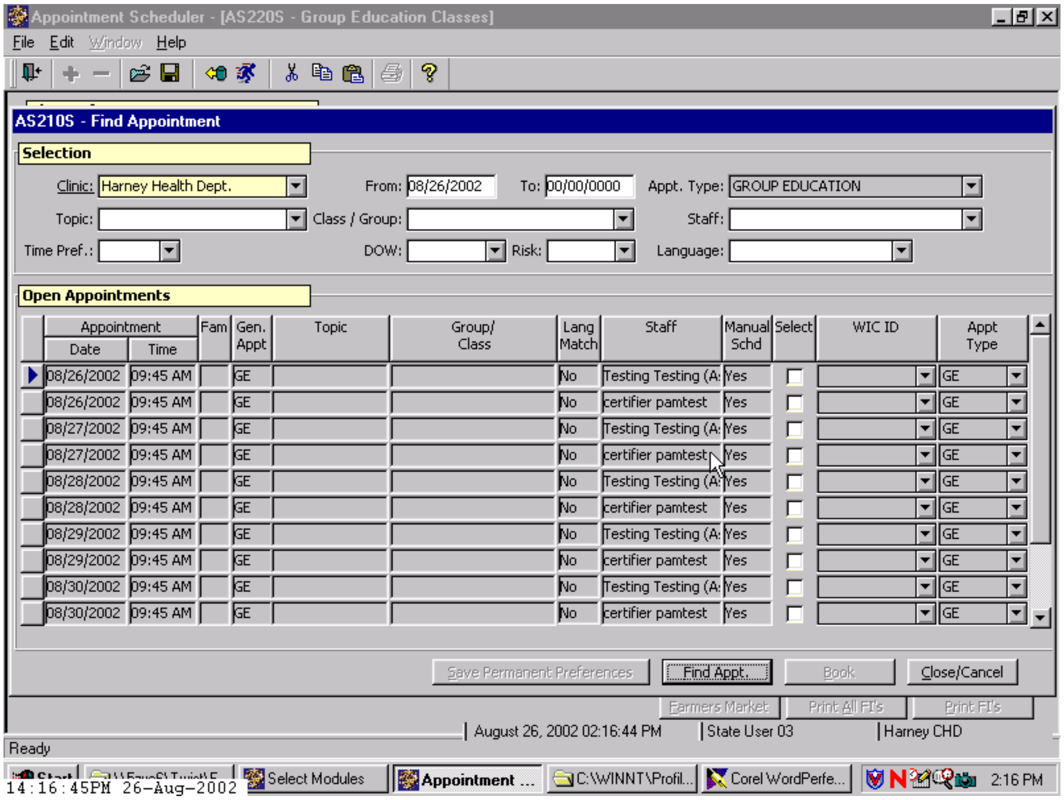

Figure 7: "Find Appointment – Open Appointments" Pop-Up

- This allows you to find a time in which to book the class. The system displays any available times for the class, based on the selection criteria, in the "**Open Appointments**" section.
- Clicking the "**Cancel**" button closes the pop-up without scheduling the class.

5. **Click the "Select" checkbox corresponding to the desired date and time slot for the class.**

6. **Click the "Book" button to book the selected time.**

- If you do not want to continue with booking the class, click the "**Cancel**" button to close the pop-up.
- When you click the "**Book**" button, the pop-up closes and the following fields in the Class Info section of the "**Nutrition Education Classes**" screen are now filled in: Instructor, Date Held, Start Time, and End Time.

7. **Save.**

♫ NOTE: To schedule another class, click the "New Class" button. The screen will clear allowing you to book the next class as previously described.

8. **Exit.**

➥ *Practice Activity #3:*

Use the information from your agency calendar for this practice. You will be entering information about Group Education Classes for your agency.

The starting point for this section is:
Appointment Scheduler ➪ Scheduling ➪ Groups Maintenance ➪ Group Education Classes

1. Select the "Clinic" from the drop down list.
2. Tab to the "Topic" field and select the topic from the drop down list.
3. Tab to the "Class Title" field and select from the drop down list.
4. Tab to the "Location" field and select from the drop down list.
5. Tab to the "Room #" field and enter the room number, if appropriate.
6. Tab to the "Maximum Capacity" field and enter the maximum number for this class.
7. Tab to the "Notes" field and enter any applicable notes.
8. Save.
9. Click the "Schedule Class" button.
10. On the "Find Appointment" pop up, edit the "From" and "To" dates if needed.
11. Click the "Find Appt." button.
12. Click the "Select" checkbox corresponding to the desired date and time for this class.
13. Click the "Book" button.
14. Save.
15. Exit the "Group Education Classes" screen.

Booking a Group Education Class into the Daily Clinic Schedule via the "Daily Clinic Schedule" screen

The starting point for this section is:
Appointment Scheduler ➪ Scheduling ➪ Daily Clinic Schedule

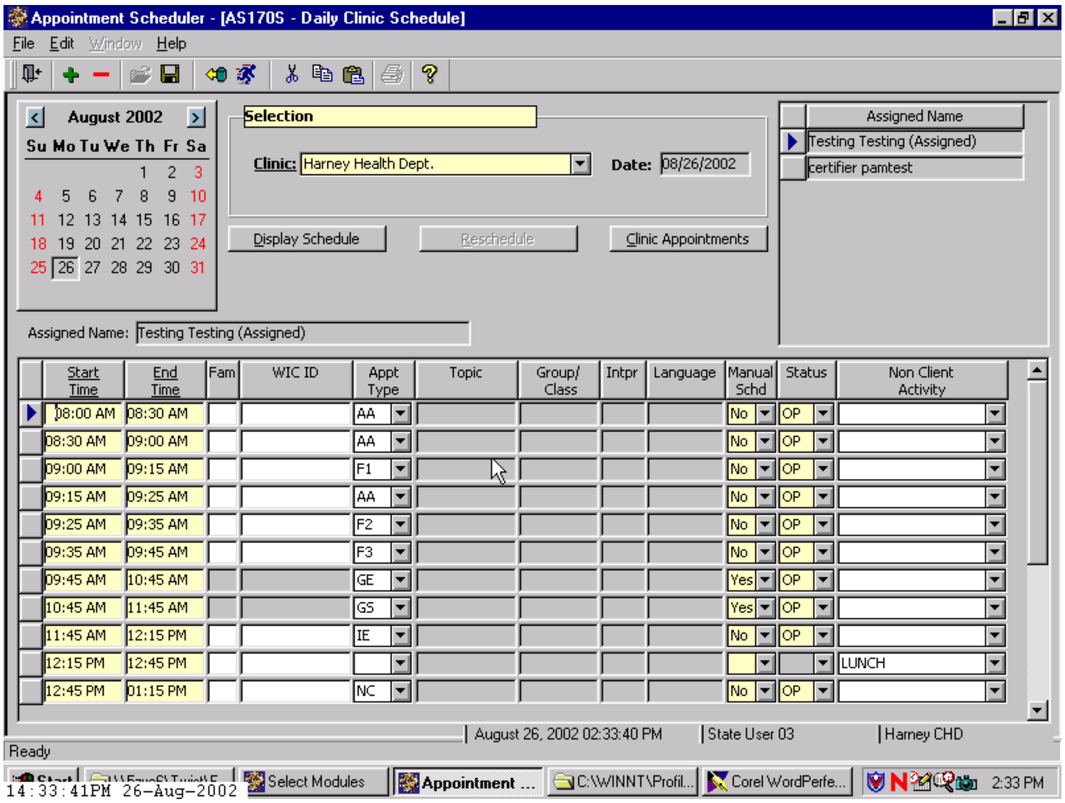

Figure 8: "Daily Clinic Schedule" Screen

1. **Locate the GE appointment slot you wish to set up and book.**

2. **Double click the "Group/Class" field on the row in which the GE appointment is located.**

   This brings up the "Group Education Classes" screen.

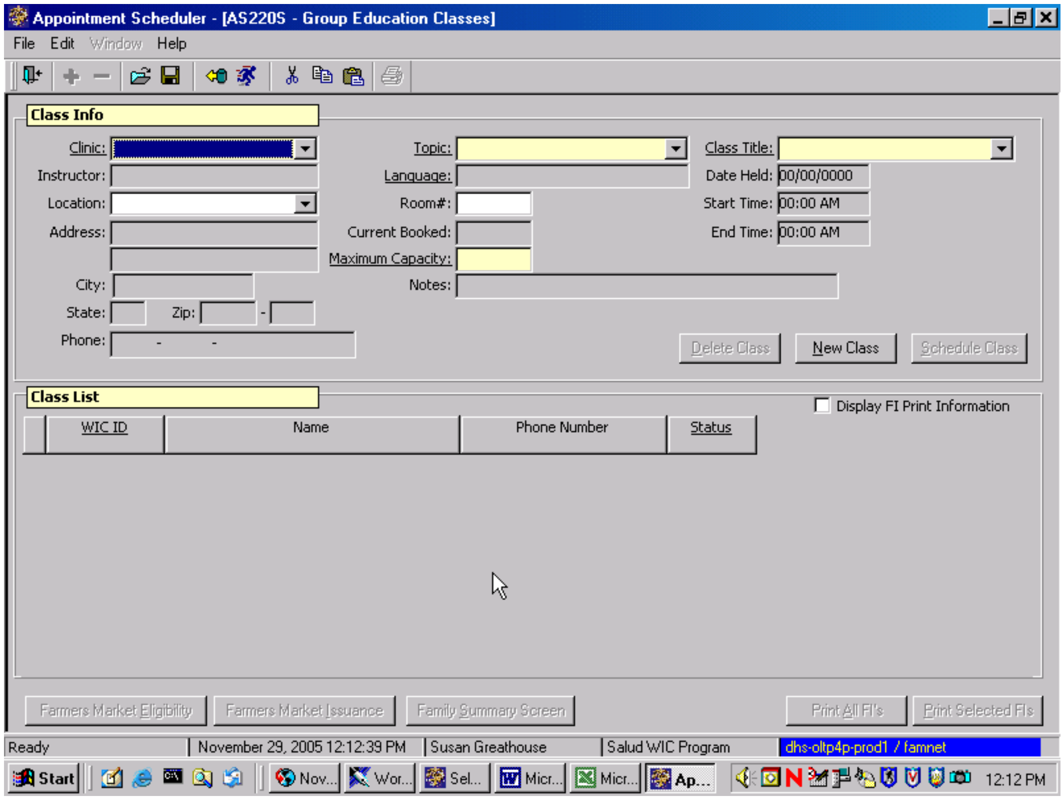

Figure 9: "Group Education Classes" Screen

3. **Complete the mandatory and optional fields in the "Class Info" section.**

4. **Save.**

5. **Exit the screen by clicking the "Exit" icon, which returns you to the "Daily Clinic Schedule" screen.**

6. **Click "Yes" on the pop-up to update the schedule with the class that you have just set up.**

   Clicking "**No**" means the class will not be scheduled.

> ☺ **See Job Aid "Making a Group Education Appointment."**

Booking a Group Screening

This function is similar to booking "Group Education Classes," only you are booking appointments for Group Screenings (sometimes called "group certifications") rather than group classes. We are going to work on setting up group screenings and booking them into the "Daily Clinic Schedule."

The starting point for this section is:

Appointment Scheduler ➪ Scheduling ➪ Group Maintenance ➪ Group Screening

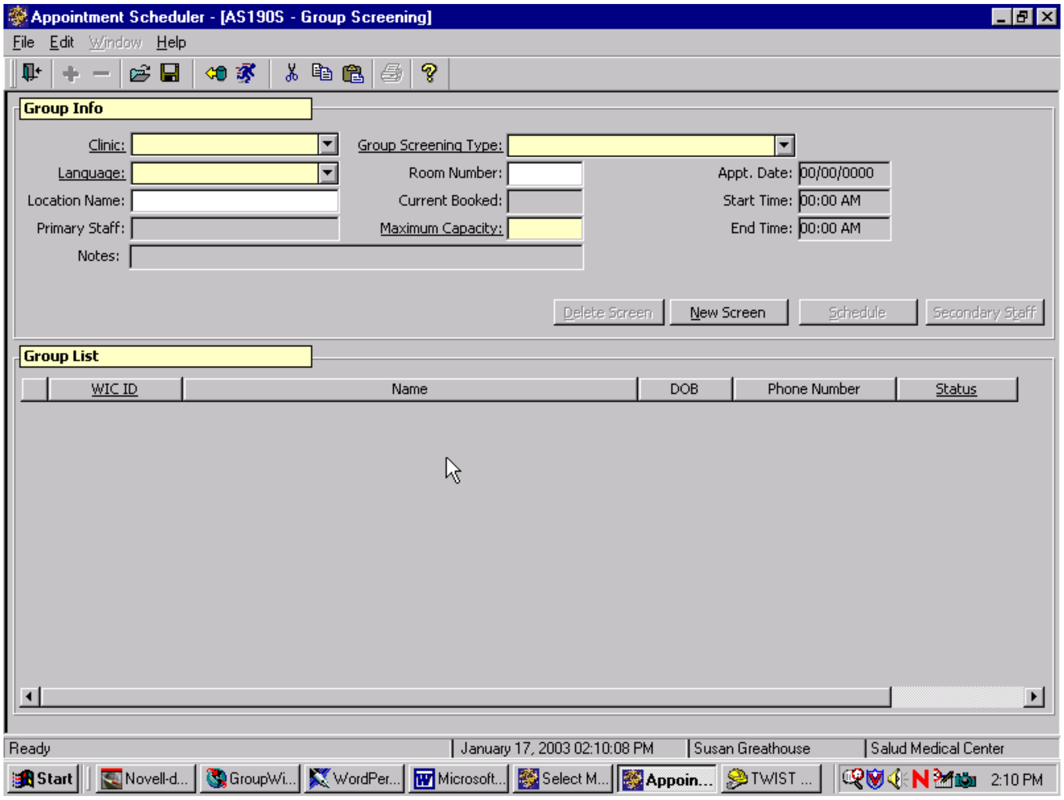

Figure 10: "Group Screening" Screen

The top part of the screen is "Group Info" and is used to set up the screening at a clinic location and to book the class into the "Daily Clinic Schedule."

1. **Complete the "Group Info" section.**

   1.1 Select the "**Clinic**" where the screening is to be held from the drop down list.

   1.2 Tab to "**Group Screening Type**" and enter appointment type from the drop down list.

   1.3 The "**Language**" field is a drop-down window that allows you to select the language in which the appointment will be conducted once the appointment has been booked using the "**Schedule**" button, which is discussed later.

   1.4 Tab to "**Room Number**" and enter if desired

1.5 The “**Appt. Date**,” “**Start Time**,” and “**End Time**” fields display the date and times for which the appointment is scheduled. These fields are filled in by the system once the class is booked.

1.6 Tab to “**Location Name**” and select location from the drop down list.

1.7 The “**Current Booked**” field displays the number of clients currently scheduled for this appointment. This is filled in by the system as clients are booked.

1.8 The “**Primary Staff**” field displays the name of the primary staff person assigned to this appointment once the appointment is booked.

1.9 Tab to “**Maximum Capacity**” and enter the maximum number of clients that can attend this screening.

♫ NOTE: Setting maximum capacity will indicate the total number of clients who can attend the screening.

♫ NOTE: When maximum capacity is reached you will receive an error message when you attempt to schedule someone into the screening. To increase the maximum capacity, you will need to go back into the “**Group Screening**” screen and change it.

1.10 Tab to “**Notes**” and enter any notes applicable to this screening.

2. **Save.**

♫ NOTE: If you are not ready to actually schedule the group screening to a specific date, time and staff, you can stop here.

♫ NOTE: In order to find group screenings that have been set up, but not yet scheduled, a search screen can be invoked from this screen by clicking on the open folder icon in the top tool bar.

3. **Click “Schedule” button. To display the “Find Appointment” screen.**

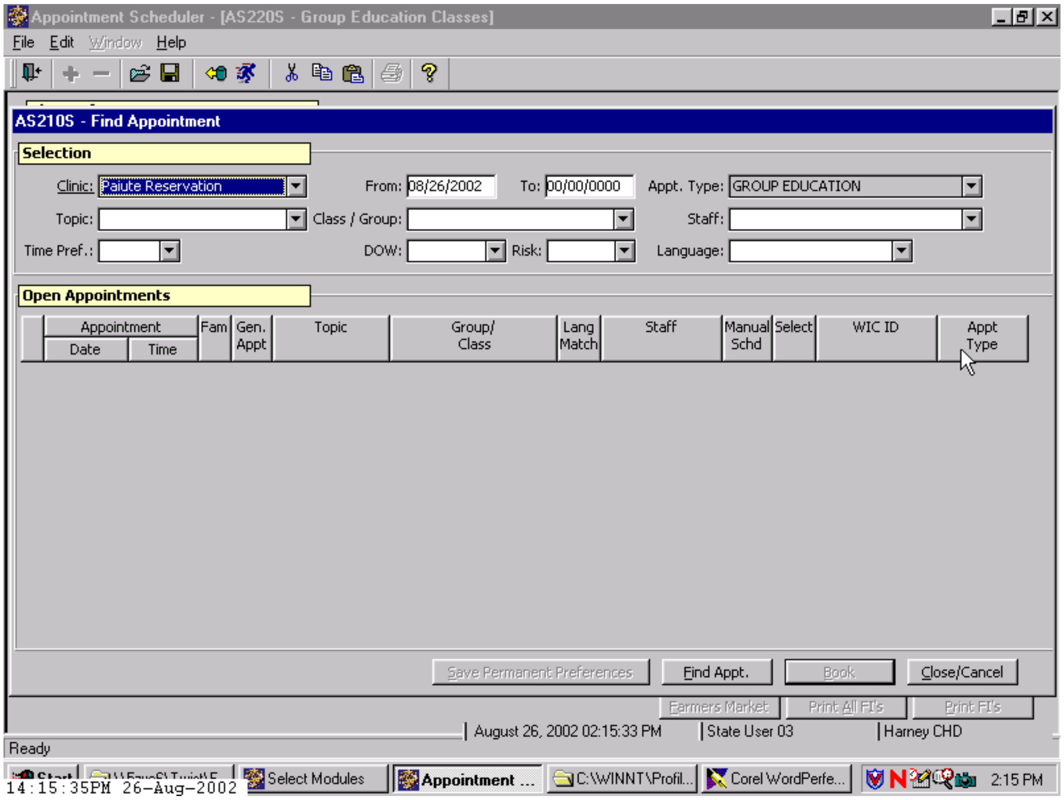

Figure 11: "Find Appointment" Pop-Up

3.1 In the "**Selection**" section, the system displays the Clinic from the "Group Screenings" screen.

3.2 The "**From**" field defaults to today's date, but you may change this date to another date in the future.

3.3 The "**To**" field defaults to 00/00/0000, but you may enter a specific end date on which the system should search the Daily Clinic Schedule for available times.

3.4 The system displays the "**Appointment Type**" field as "group screen" this cannot be changed.

3.5 To restrict the available appointments search further, you may complete the remaining fields: **Class/Group, Staff, Time Pref** (select AM or PM), **DOW (Day of Week)**, **Risk**, **Language**.

4. **Click the "Find Appt." button.**

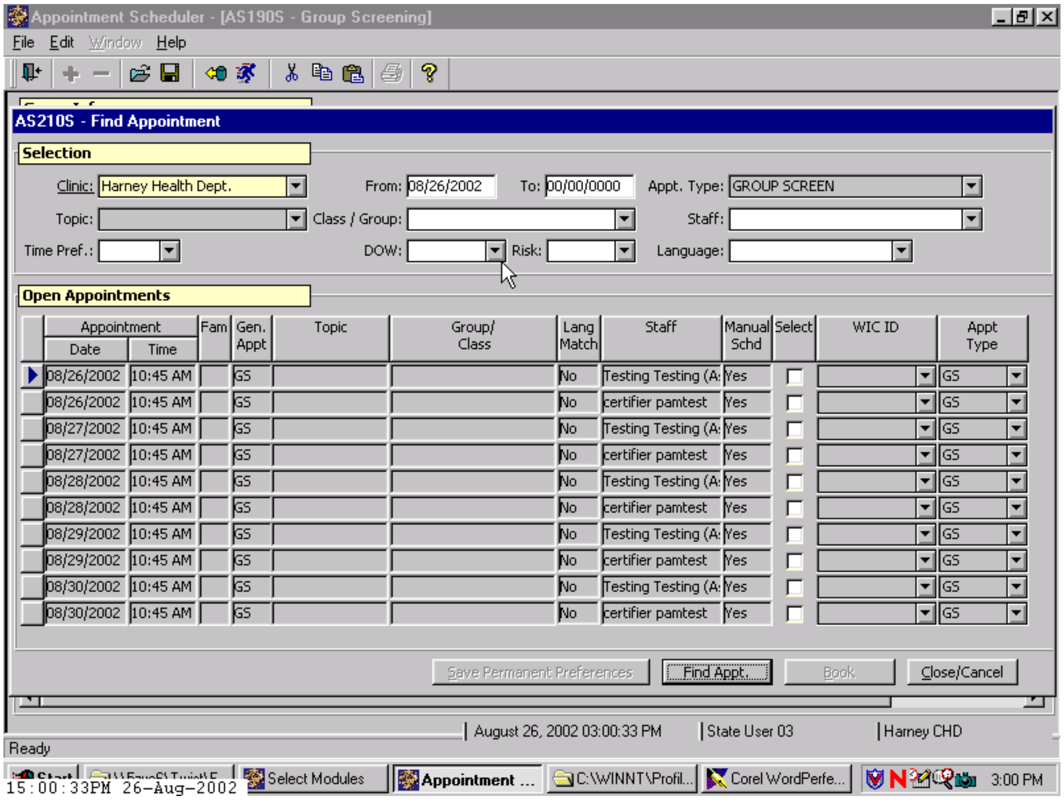

Figure 12: "Find Appointment-Open Appointments" Pop-Up

- This pop-up allows you to find a time in which to schedule the screening.
- The system displays any available times for the screening, based on the selection criteria, in the "Open Appointments" section.
- Clicking the "Cancel" button closes the pop-up without scheduling the screening.

5. **Click the "Select" checkbox corresponding to the desired date and time slot for the screening.**

6. **Click the "Book" button to book the selected time.**

   - When you click the "Book" button, the pop-up closes and the following fields in the Class Info section are now filled in: Primary Staff, Appointment Time, Start Time, and End Time.
   - The "Secondary Staff" button is also now activated.
   - If you do not want to continue with booking the screening, click the "Cancel" button to close the pop-up.

7. **Click the "Secondary Staff" button.**

This pop-up allows you to select other staff members to be assigned to the screening appointment.

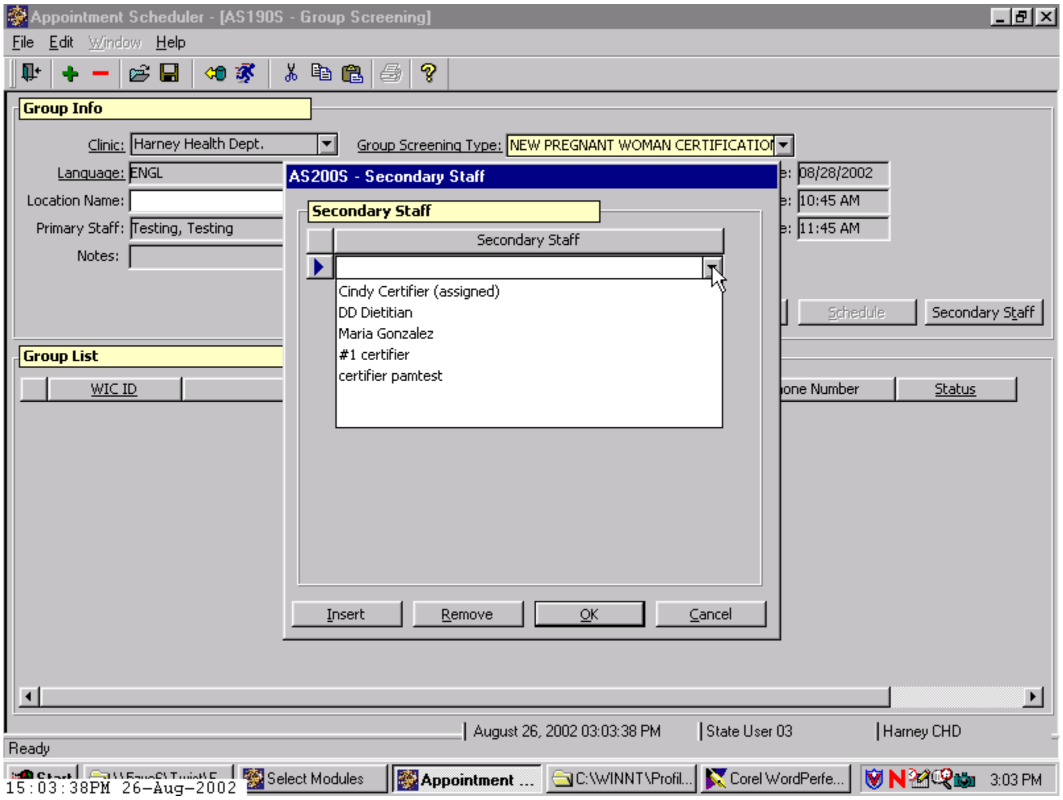

Figure 13: "Secondary Staff" Pop-Up

8. **Select a staff member from the drop down list.**

- The "Insert" and "Remove" buttons allow you to add more staff members, if available, or delete staff members not needed for this screening.
- The "OK" button will save the information and close the pop-up.
- The "Cancel" button will close the pop-up without saving the information.

9. **Save and Exit.**

♫ NOTE: To schedule another screening, click the "New Screen" button. The screen will clear allowing you to schedule the next screening as previously described.

♫ NOTE: To delete a screening that has not yet been booked, use the "**Delete Screen**" button. Once a screening has been booked, however, the "**Delete**

Screen” button is no longer enabled. To delete a booked screening, you must go to the Daily Clinic Schedule and change the GS appointment type to clear the scheduled screening.

♫ NOTE: Group screening appointments will not show up in reports, such as the Productivity or Show Rate reports.

♫ NOTE: You will not be able to print vouchers from the “**Group Screening**” screen.

➥ *Practice Activity #4:*

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

The starting point for this section is:
Appointment Scheduler ⇨ Scheduling ⇨ Groups Maintenance ⇨ Group Screenings.

1. Select the “Clinic” from the drop down list.
2. Tab to the “Group Screening Type” field and select the appointment type from the drop down list.
3. Tab to the “Room #” field and enter the room number, if appropriate.
4. Tab to the “Location” field and enter the location, if desired.
5. Tab to the “Maximum Capacity” field and enter the maximum number for this screening.
6. Tab to the “Notes” field and enter any applicable notes.
7. Save.
8. Click the “Schedule” button.
9. On the “Find Appointment” pop up, edit the “From” and “To” dates if needed.
10. Click the “Find Appt.” button.
11. Click the “Select” checkbox corresponding to the desired date and time for this screening.
12. Click the “Book” button.
13. Click the “Secondary Staff” button.
14. On the “Secondary Staff” pop-up, select any secondary staff to be assigned to this screening.
15. Click “OK.”
16. Save.
17. Exit the “Group Screenings” screen.

✓ Skill Check:

Using your Data Entry Document, complete the nutrition Education Classes table and set up your Group Nutrition Education classes as completely as you can.

✍ Notes:

Chapter 4: Appointment Scheduler
Section 4: Scheduling Appointments
Lesson: Schedule Appointment Now

Objectives:

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

- navigate to the Appointment Scheduler from the Intake functional area and schedule a client two different ways.
- use the "Family Appointment Record" to schedule an appointment.
- schedule an appointment from the Daily Clinic Schedule
- recognize the different appointment types available in TWIST; and
- distinguish between generic and specific appointments.

Overview:

You are in the middle of completing a certification, and you need to make an appointment, or on the phone prescreening a potential client and also want to book an appointment for them at the same time. What do you do? Well, with the help of fast paths or a push button on your screen, the TWIST Appointment Scheduler is just a click away! Let's review a few possible situations when you might need to quickly schedule an appointment and see how easily you can do it.

The Job Aid at the end of the chapter outlines the many ways that you can schedule an appointment in TWIST.

☺ See Job Aid "How to Make an Individual Appointment" for more information.

Instruction:

Scheduling an Appointment from Enrollment & Intake

There are two different ways to schedule an appointment from Enrollment & Intake. One is through "Applicant Prescreening" and other is through "Enrollment".

The starting point for this section is:

Client Processes ⇨ Enrollment and Intake ⇨ Applicant Prescreening

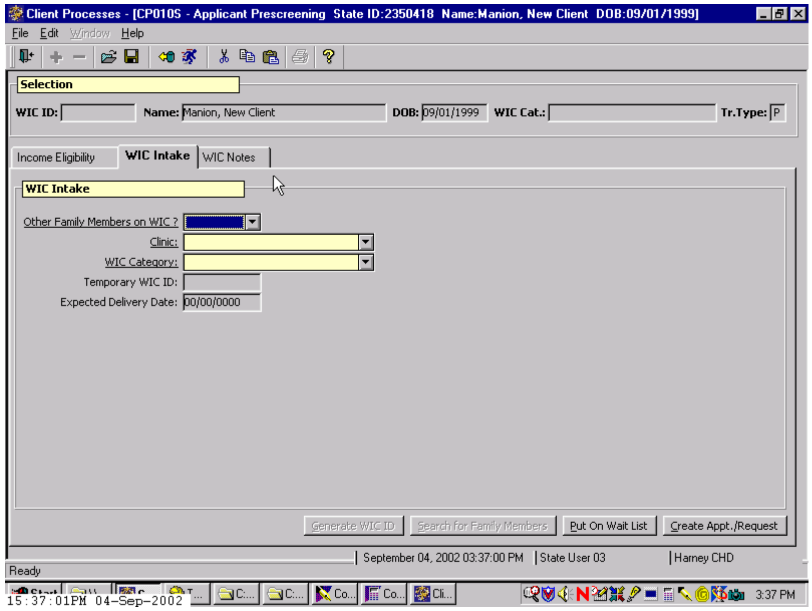

Figure 1: "Applicant Prescreening - WIC Intake" Screen

1. **Retrieve the client for whom you wish to make an appointment.**

2. **Click "Create Appt./Request" button.**

This will take you to the "**Family Appointment Record**" screen. The Family Appointment Record allows you to see all the appointments for the entire family. It is the most important screen for appointment scheduling.

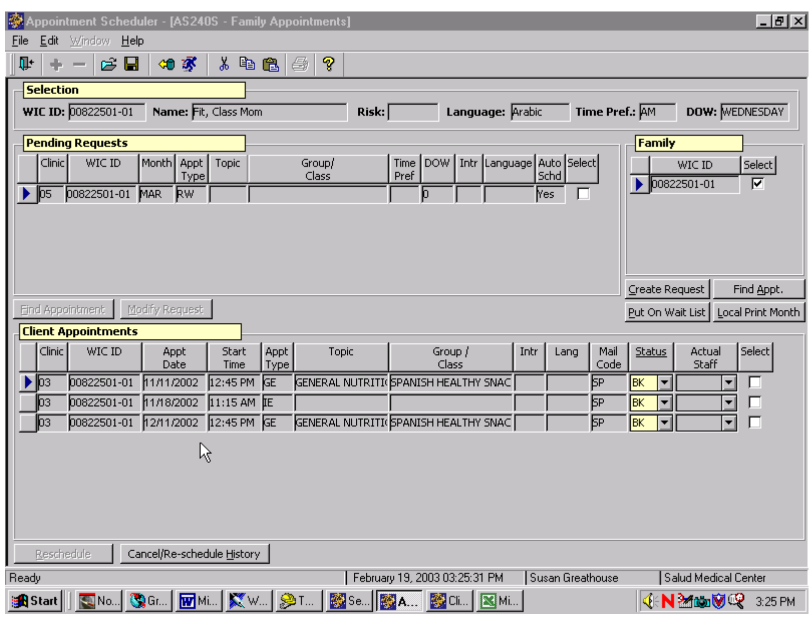

Figure 2: "Family Appointments" Screen

3. **In the "Family" section, click the "Select" checkbox corresponding to the client for whom you want to make an appointment.**

- When you click the "**Select**" checkbox, the "**Create Request**," "**Find Appt.**," "**Local Print Month**" and "**Put on Wait List**" buttons are activated.
- If you need to see more information on the client, double click on the WIC ID.

4. **Click the "Find Appt." button to view the "Find Appointment" pop-up.**

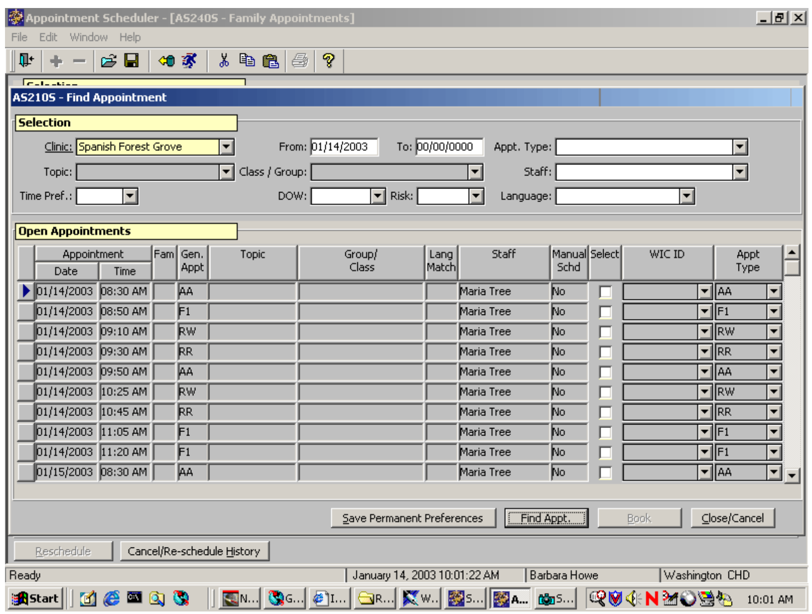

Figure 3: "Find Appointment" Pop-Up

- In the "**Selection**" section, "**Clinic**" will default to the clinic you are currently in. You can change this by selecting a different clinic from the drop down list.
- The system defaults the "**From**" date to today's date, but you may change this to any date in the future.
- The "**To**" date should be entered if there is an end date for which you need to limit the search. This may be left at the default "**00/00/0000**" if no end date is needed. If you have a large number of appointment templates already scheduled, it is better to put in an end date, so the system can respond more quickly to your query.
- You may enter any other selection criteria, if desired, for "**Appt Type**," "**Staff**," "**Time Pref.**," "**DOW**," or "**Interpreter**".

☺ See Job Aid "Appointment Types" for more information.

- "**Language**" refers to client language preference. This field does not need to be filled in unless you want the client to have an appointment in a different language from their spoken language indicated in the Client Primary. In other words, this field works as a language "override" of the language listed in the Client Primary.
- If you have selected the appointment type of group education (GE), you may select the "**Topic**". You may select the "**Class/Group**" if you have selected an appointment type of either group education (GE) or group screening (GS).
- The system will display the client's risk level in the "**Risk**" field if the client is already enrolled in WIC. If you are coming from prescreening, this field will be blank. The risk level is modifiable and is used to match the client to the appropriate staff person based on risk level.
- If you want to save "**Time Pref.**," "**DOW**" or "**Staff**" preferences in the client's record for future appointments, click the "**Permanent Preference Change**" button.
- Click the "**Cancel**" button to close the pop-up without making an appointment.

5. **Click the "Find Appt." button at the bottom of the pop-up screen.**

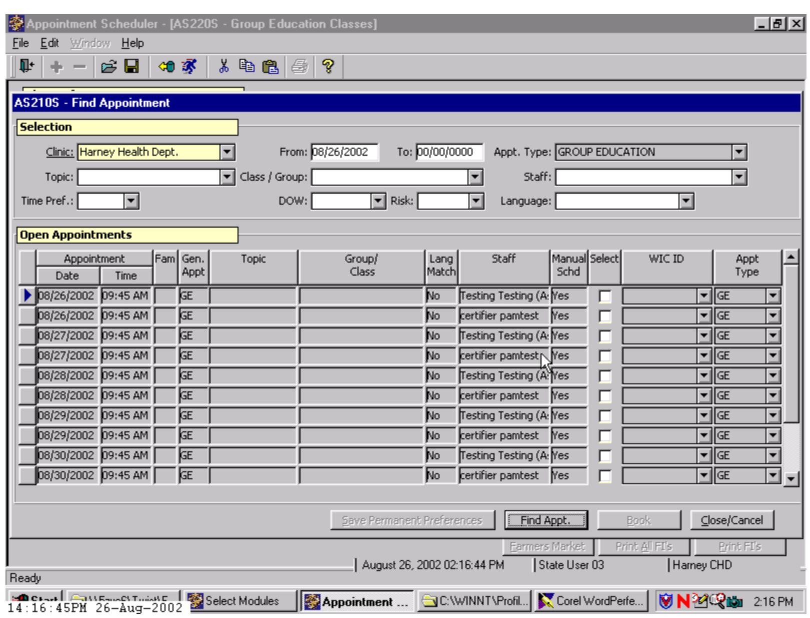

Figure 4: "Find Appointment" Pop-Up

- This displays the open appointments that meet the selection criteria.
- The "**Appointment Date**" displays the date of the available appointment.
- The "**Appointment Time**" displays the start time of the appointment.
- The "**Fam**" field will display an "**F**" if this appointment is restricted to coordinated family appointments times. Most agencies will not be using this feature.
- The "**Generic Appt Type**" field displays the generic appointment type if the appointment found is included in a generic type.
- The "**Topic**" field will be populated with the topic only when this appointment is for a GE (group education) class. (See Notes)
- The "**Group/Class**" field will be populated with the corresponding class or group code if this appointment is for a GS (group screening) or GE appointment.
- The "**Lang Match**" field displays a "**Yes**" if the language needs of the client match the language skills of the staff member. A "**No**" indicates that there is not a match between the client and the staff member's language. You can still, however, book the appointment with that staff and the appointment will display in the Family Appointment record with a "**Yes**" in "**Interpreter**" and the language needed.
- The "**Staff**" field displays the staff member's name.
- The "**Manual Schd**" field displays a "**Yes**" if the appointment must be scheduled manually. A "**No**" means that the appointment may be scheduled using the automatic scheduler. The default is "**No**".
- The "**Select**" checkbox is used to select the appointment for booking. You can un-select an appointment by clicking this box again before you book the appointment.
- The "**WIC ID**" field will display the client's WIC ID number once the "Select" checkbox has been marked for the appointment.
- The "**Appointment Type**" field displays the appointment type that will go in the client's record.

6. **Check the "Select" checkbox next to the desired appointment.**

- The system fills in the "**WIC ID**" field with the client's ID number.
- The "**Book**" button becomes activated.
- If a generic appointment type (AA, RR or NN) is selected, you must choose a real appointment type to fill the slot.

7. **Click the "Book" button to schedule the appointment and close the pop-up.**

- The client appointments section of the family appointments screen is now populated with the scheduled appointment information. The information is automatically saved.

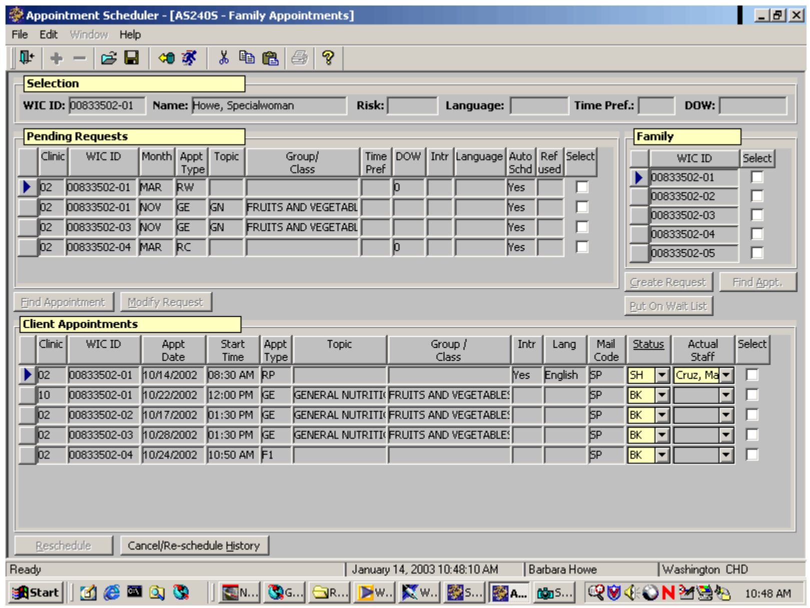

Figure 5: "Family Appointments" Screen

"Client Appointments" Section

- The "**Clinic**" field lists the clinic where the appointment is to be held.
- The "**WIC ID**" field displays the ID number for the scheduled client.
- The "**Appt Date**" field lists the date of the appointment.
- The "**Start Time**" field lists the scheduled start time for the appointment.
- The "**Appt Type**" field lists the specific appointment.
- The "**Topic**" field will display a topic if this is for a group education class.
- The "**Group/Class**" field will display the group or class title if this appointment is either a group education class or group screening appointment.
- The "**Intr**" field will display "**Yes**" if an interpreter is needed or "**No**" if one is not needed. See Figure 5: "Family Appointments" Screen for an example.

- The "**Language**" field will display the language for which an interpreter is needed, if "**Yes**" is displayed in the "**Intr**" field.
- The "**Mail Code**" indicates where the client's FIs will be printed. This field is display-only and based on what was entered in the client's intake record.
- The "**Status**" field lists the current status of the appointment.
- The "**Actual Staff**" field is used when documenting appointment attendance so the staff person who actually saw the client can be captured.
- The "**Select**" checkbox is used for rescheduling appointments. This is discussed in another lesson.

8. **Exit.**

Now that we know the first way to schedule a client through Enrollment and Intake, let's take a brief look at the other way.

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

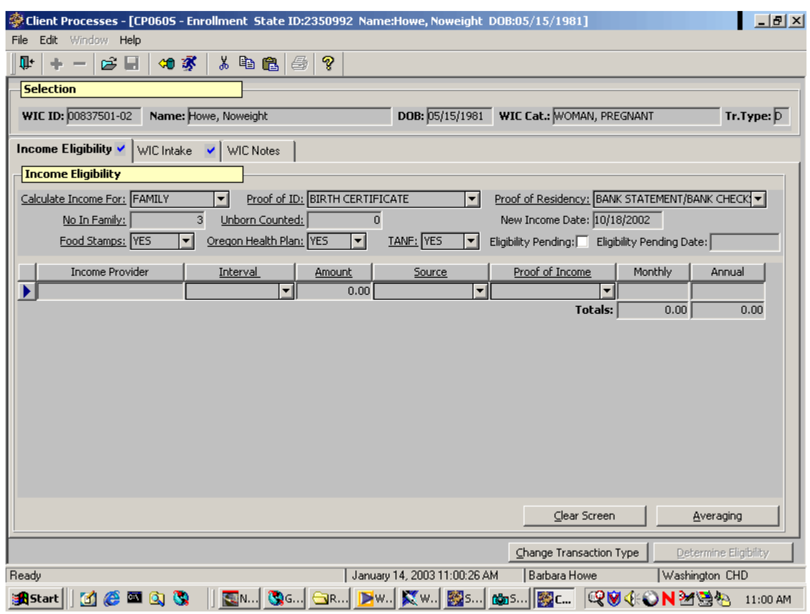

Figure 6: "Enrollment" Screen

1. **Click on the "open" icon to retrieve your client.**
2. **Fast Path to "Family Appointments".**
3. **Schedule the appointment as outlined earlier in the lesson.**

➥ *Practice Activity #1:*

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

The starting point for this activity is:

Client Processes ⇨ Enrollment and Intake ⇨ Prescreening

1. Click on the “Open” icon to open the “Client Search” pop-up and return to the “WIC Intake” screen with your client.
2. Click on the “Create Appt./Request” button to go to the “Family Appointments” screen.
3. Click the “Select” checkbox corresponding to your client’s WIC ID number.
4. Click the “Find Appt.” button to bring up the “Find Appointment” pop-up.
5. Enter the desired “Selection” criteria.
6. Click the “Find Appt.” button to display the open appointments.
7. Locate the desired appointment and click the corresponding “Select” checkbox.
8. Click the “Book” button.
9. Exit.

Scheduling an Appointment from Daily Clinic Schedule

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

1. **In the Daily Clinic Schedule, select the clinic and date where you want to schedule the client.**

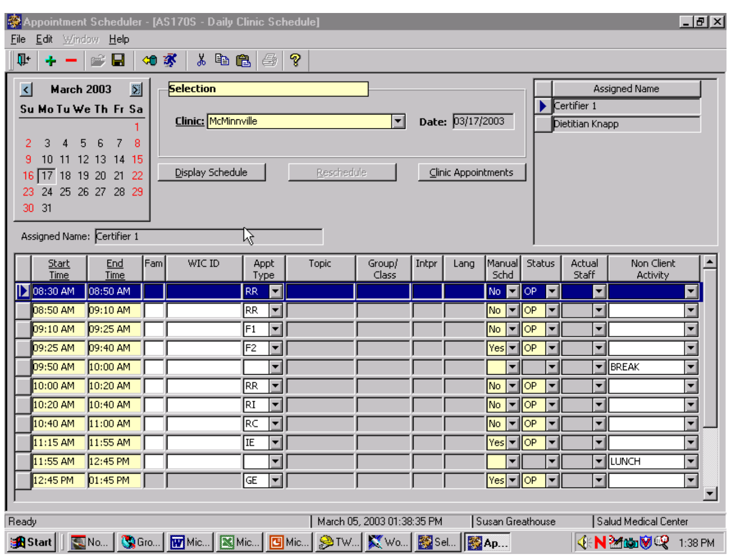

Figure 7: “Daily Clinic Schedule” Screen

2. **Select an open appointment time.**

3. **If you know the client's WIC ID number, enter that number in the WIC ID field for that appointment time.**

♫ NOTE: Remember you can double-click on the WIC ID number in the Daily Clinic Schedule to display the name, category and date of birth of the client.

4. **Tab to the Appointment Type field and select the correct appointment type for that client's appointment. You may need to adjust the start or end times for the appointments before and after if the appointment type you select doesn't match the appointment length in the schedule.**

♫ NOTE: If you do not know the client's WIC ID number, you can click on the open appointment slot and then use the Fast Path to go to the Client Primary and retrieve the client you are trying to schedule. As in Step 4 above, you may need to change the Appointment Type and adjust the appointment start and end time so that times do not overlap.

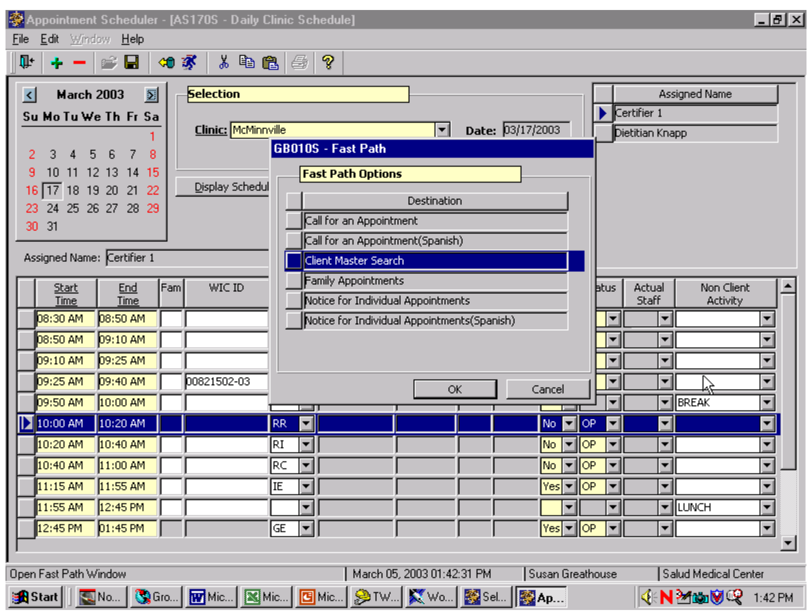

Figure 8: Fast Path from "Daily Clinic Schedule" Screen

5. **Click "Save" to save the scheduled appointment.**

✂ *Tips and Shortcuts:*

You can also schedule a client directly by starting in the Family Appointment record and retrieving the client for whom you are scheduling an appointment. The process for scheduling an appointment is exactly the same once you reach the "Family Appointment Record" screen, no matter how you get there.

You can reach the "Family Appointment Record" to schedule a client from:

- the "Applicant Prescreening" screen using the "Create Appt./Request" button,
- the "Enrollment" screen using the fast path,
- the "Nutrition Education Plan" screen using the "Schedule Appointment" tab, and
- the Appointment Scheduler module under "Scheduling"

↪ *Practice Activities:*

The starting point for this activity is:
Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

1. Select the date and clinic where you want to schedule your client's appointment.
2. Click on the WIC ID field on the time of the appointment.
3. Click on the Fast Path icon and select "Client Master Search".
4. Find yourself in the Client Master and click "Return with Client".
5. Adjust the appointment type to "F1".
6. Save and exit.

✓ *Skill Check:*

Now you are going to get a chance to put this new scheduling knowledge to the test!

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

1. Prescreen a client that does not yet exist, and make an appointment for their certification appointment from the "Applicant Prescreening" screen. Make up the client information.
2. Print out the "Family Appointments" screen for this client after you have booked the appointment.

✍ Notes:

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Chapter 4: Appointment Scheduler
Section 4: Scheduling Appointments
Lesson: Scheduling a Client into a Group Nutrition Education Appointment

Objectives:

Upon completion of this lesson the user will be able to:
- schedule clients into group nutrition education appointments.

Overview:

Scheduling and maintaining group appointments are important elements of WIC business. Federal regulations require that WIC clients be offered nutrition education contacts. Classes can be easily scheduled and maintained within the TWIST system using the same basic functionality that applies to scheduling individuals and families.

Instruction:

Reviewing the "Group Education Classes" Screen

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Group Maintenance ⇨ Group Education Classes

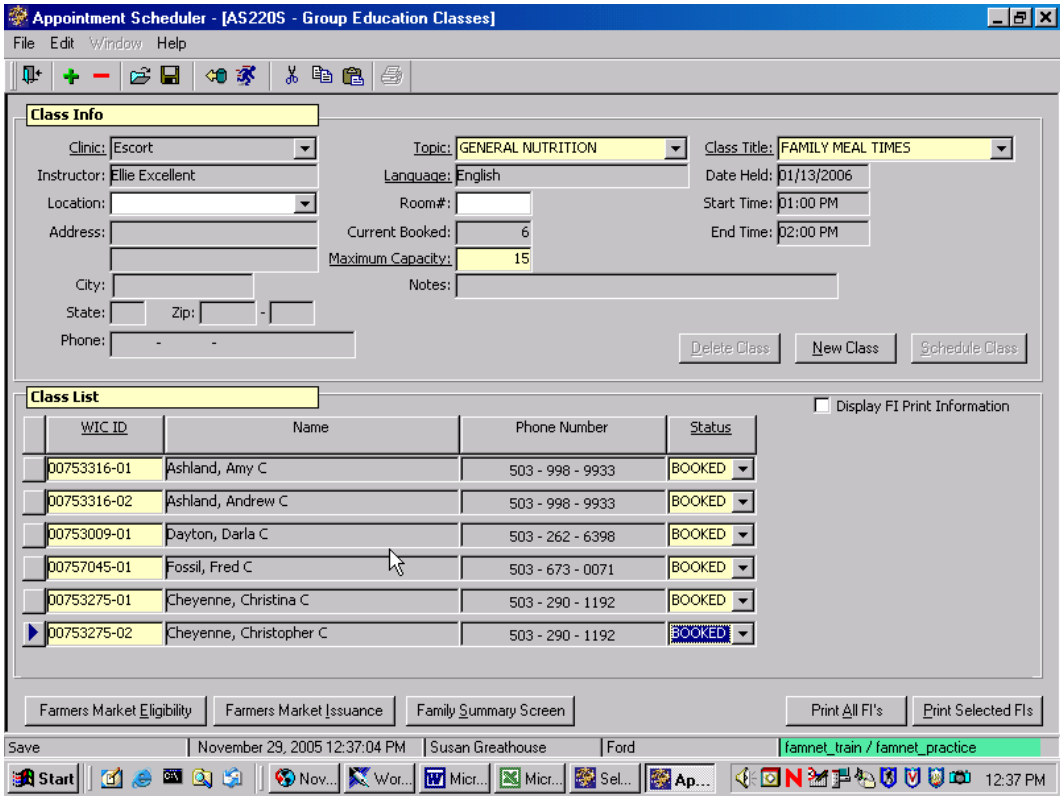

Figure 1: "Group Education Classes" Screen

- There are two parts to this screen: "**Class Info**" at the top, which displays information about the Group Education Class, and "**Class List**," which displays information about those clients scheduled to attend the class.
- The "Class Info" section is completed by the scheduling person in your local agency and booked into specific appointment slots on the "Daily Clinic Schedule." You will know that this has been done when you see both the "Topic" and the "Group/Class" fields are filled with text.
- After the class is scheduled in the "Daily Clinic Schedule," clients can then be booked into the class.

When you are using the "Group Education Classes" screen for scheduling, you will be using the "Class List" part of the screen, but let's briefly review the "Class Info" section so you know what information is available.

- The "**Clinic**" field will display the clinic at which the group education class will be held.
- The "**Topic**" field indicates the topic of the class.
- The "**Class Title**" indicates the name of the class.
- The system displays the "**Instructor**" field with the name of the staff person assigned to this class.

- The “**Language**” field displays the language in which the class will be taught.
- The “**Date Held**,” “**Start Time**,” and “**End Time**” fields will display the date and times for which the class is scheduled.
- The “**Location**” field displays the location of the class. If this is blank, the location will be the same as the physical address of the clinic where the class is scheduled.
- The “**Address**,” “**City**,” “**State**,” “**Zip**,” and “**Phone**” fields display the corresponding data for the class location site.
- The “**Room #**” field displays the room number where the class will be held, if available.
- The “**Current Booked**” field displays the number of clients currently scheduled for this class. This is filled in by the system as clients are scheduled.
- The “**Maximum Capacity**” field displays the maximum number of clients for attending this class. When booking clients, if the number of clients in the “Current Booked” field exceeds the number entered as the maximum, the system will display a message to prevent over booking. The “Maximum Capacity” may then be increased by the person in charge of scheduling, if desired, to accommodate more clients in the class.
- The “**Notes**” field shows any notes entered relating to this class.

♫ NOTE: The “New Class” and “Schedule Class” buttons are used by your scheduling person to book the Group Education class in your agency’s “Daily Clinic Schedule” screen.

Scheduling a Client in a Group Education Class

There are three different ways to book clients into group education classes by using: 1) the “Group Education Classes” screen, 2) the “Daily Clinic Schedule” screen or 3) the “Family Appointment Record” screen.

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Group Maintenance ⇨ Group Education Classes

1. **Click the “Open” icon to display the “Select Group Education Class” pop-up.**

    - This pop-up allows you to search for any scheduled group education class.
    - There are two sections to the pop-up: “Selection” and “Results.”

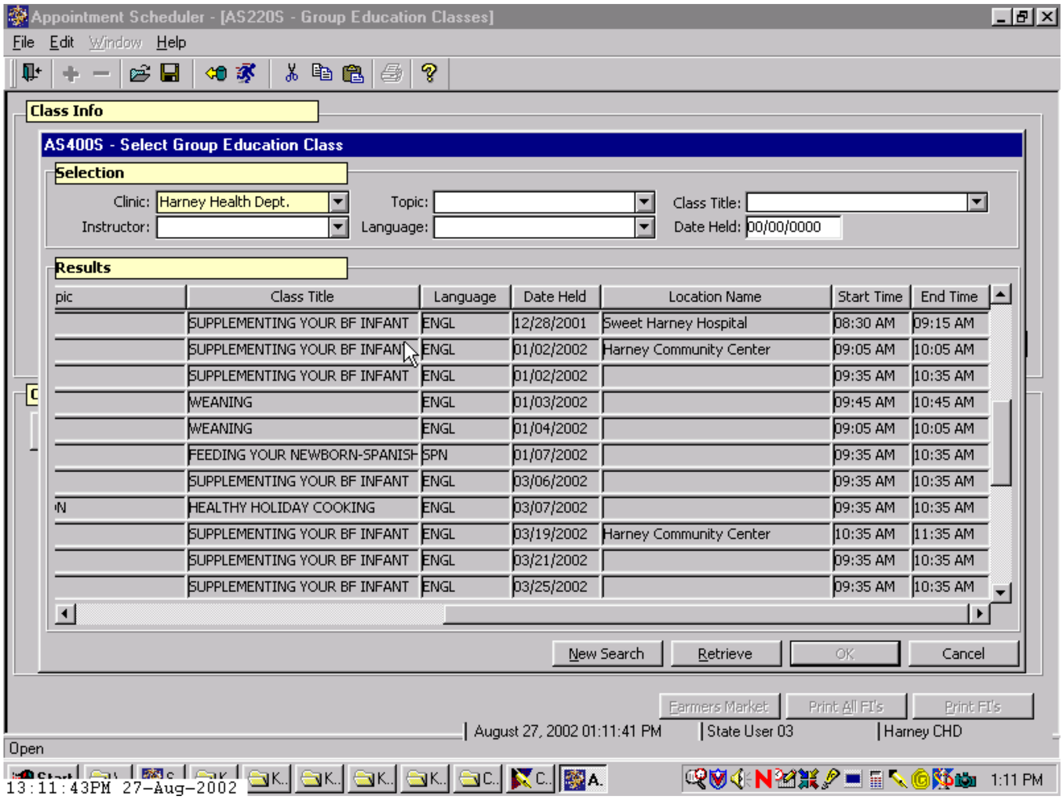

Figure 2: "Select Group Education Classes" Screen

2. **In the "Selection" section, enter data into the fields on which you wish to search for a group education class.**

    - Adding more information in the "Selection" section fields will give you more limited results.
    - You must enter at least the clinic name to search for a class.

3. **Click the "Retrieve" button.**

4. **Locate the desired group education class and double-click on that line.**

    - Once you double click on the appointment line, the pop-up will close and return you to the "Group Education Classes" screen with the "Class Info" data populated.
    - If clients have already been booked into this class, their names and corresponding information will be shown in the "Class List" section.

♫ NOTE: You may also click once on the desired appointment line and then click the "OK" button to close the pop-up and return to the "Group Education Classes" screen.

5. **Click the "Insert Record" icon to create a new row for scheduling a client to this group education class.**

There are two ways to enter the client information into the class:

5.1 **Enter the client's "WIC ID" and tab to the "Status" field.**

The system displays the client's "name" and "phone number" in the corresponding fields. The system defaults the "Status" field to "booked."

5.2 **If you do not know the client's ID number, you can fast path to client master search, search for and return with the client.**

The client will then be retrieved directly into the class.

6. **Save.**

- Notice that the "Current Booked" field in the "Class Info" section has been updated to include the client you just scheduled for the class.
- To continue booking other clients for this same group education class, tab off the "Status" field to create a new client row.

7. **Exit the "Group Education Classes" screen.**

♫ NOTE: The "**Farmers Market Eligibility**", "**Farmers Market Issuance**," and "**Family Summary Screen**" are all used when the class is held and are explained in detail in other lessons.
The "**Display FI Print Information**" checkbox, "**Print All FIs**," and "**Print Selected FIs**" buttons have been temporarily disabled.

➥ *Practice Activities:*

Using your ☛ Activity Sheet, follow the steps below to schedule your client to a group nutrition education class.

1. Click on "Appointment Scheduler."
2. Click on "Scheduling."
3. Click on "Group Maintenance."
4. Click on "Group Education Class."
5. Click the "Open" icon.
6. In the "Selections" section, enter the corresponding data from your activity sheet.

7. Click the "Retrieve" button.
8. Double click on the class designated on your activity sheet.
9. Click the "Insert Record" icon to create a new client row in the "Class List" section.
10. Enter the "WIC ID" number.
11. Tab to the "Status" field and keep the "booked" status entered by the system.
12. Save.
13. Exit the "Group Education Classes" screen.

Congratulations! You have scheduled your client to a Group Nutrition Education Class!

Scheduling a Client into Group NE via the "Daily Clinic Schedule" Screen

The "Group Education Classes" screen may also be accessed from the "Daily Clinic Schedule."

The starting point for this section is:
Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

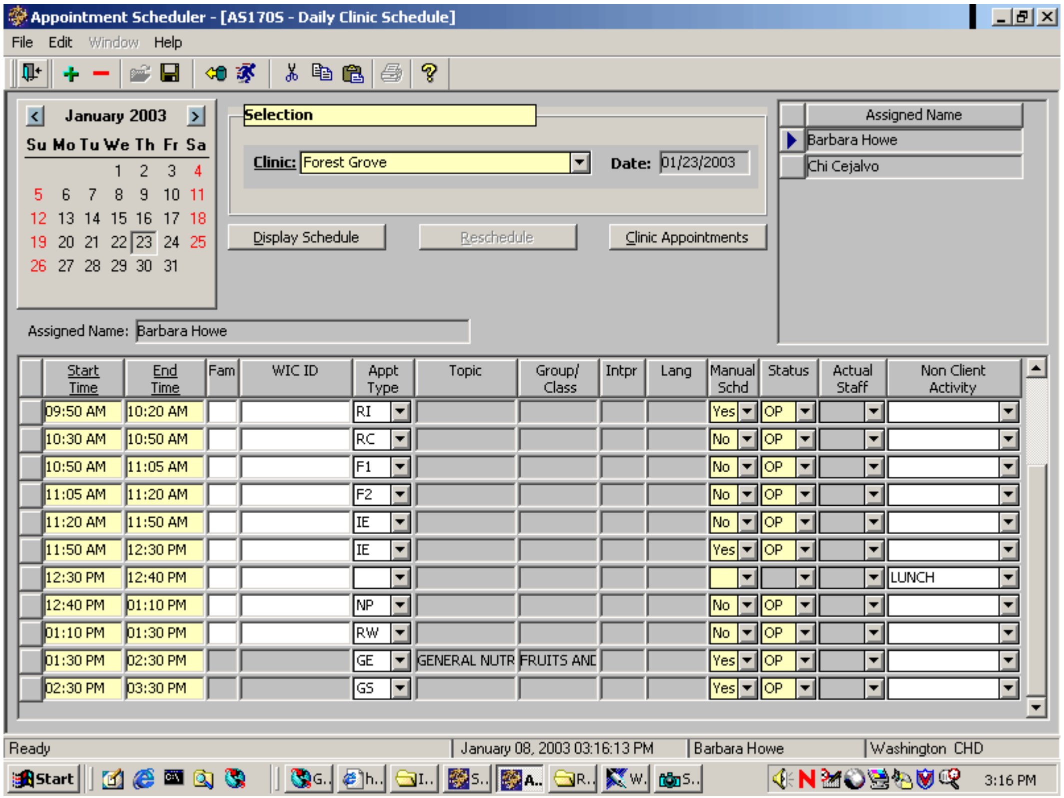

Figure 3: "Daily Clinic Schedule" Screen

1. **Double click in the "Group/Class" field corresponding to the desired group education class.**

   This will take you directly to the "Group Education Classes" screen. You can then schedule the client as previously outlined.

♫ NOTE: When the "Group Education Classes" screen is accessed this way it is not necessary to search for the class you want. You are already there!

Scheduling a Client in a Group Education Class via the "Family Appointment Record" Screen

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling Family Appointments ⇨ Family Appointment Record

1. **Using the "Open" icon, search for and return with the client to the "Family Appointment Record" screen.**

2. **Select the WIC ID number of your client by clicking on the select box.**

3. **Select the "Find Appt." button which will take you to the "Find Appointment" screen.**

   Please refer to the "Schedule Appointment Now" lesson for more information on this screen.

4. **Under the "Appointment Type" field, select "Group Education" from the drop down list.**

5. **Click on the "Find Appt" button.**

   All group education classes with openings will be listed under the "Open Appointments" section of the screen.

6. **Select the class by clicking on the select box.**

   The client's WIC ID number will auto-fill.

7. **Click on the "Book" button.**

You will be taken back to the "Family Appointment Record" and the class appointment you just made will be visible under the "Client's Appointments" section.

♫ NOTE: You can only schedule one family member at a time into a group NE class from the "Family Appointment Record" screen, even if it for the same class.

✓ *Skill Check:*

Use your ☛ Activity Sheet for this practice.

The client needs to be scheduled into a group nutrition education class on the topic of "General Nutrition."

Print out the blank "Group Education Classes" screen before you schedule the appointment and then print out the screen again after you have scheduled the appointment.

✍ *Notes:*

Chapter 4: Appointment Scheduler
Section 4: Scheduling Appointments
Lesson: Handle Walk-In & Overbook Appointments

Objectives:

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

- schedule walk-in clients in the "Daily Clinic Schedule."

Overview:

Making a space in the clinic schedule for walk-in appointments is a common WIC occurrence. TWIST allows you to book a walk-in appointment or add a necessary space in a busy schedule, while at the same time, keeping track of and reporting the number of walk-in appointments!

Let's go to the "Daily Clinic Schedule" and see how to handle a walk-in client.

Instruction:

How to Format a Lesson

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

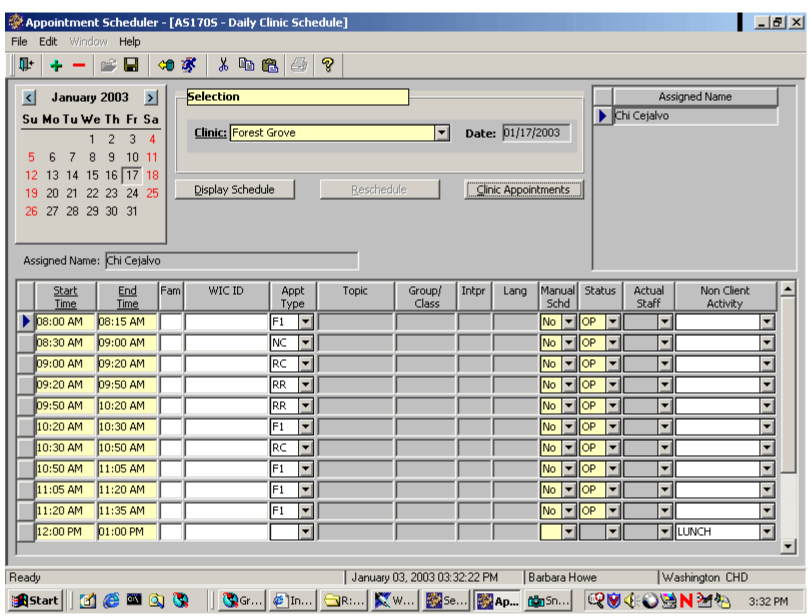

Figure 1: "Daily Clinic Schedule" Screen

NOTE: Please refer to Chapter 4, Lesson 202 *Daily Clinic Schedule* for more detailed instructions on the "**Daily Clinic Schedule**" screen.

In the "Selection" section, select the "Clinic" from the drop down list.

In the "Calendar" section, click on the number corresponding to the day on which you wish to schedule the walk-in appointment.

To move the calendar forward or backward by month, use the arrows in the left and right hand corners of the calendar.

Click the "Display Schedule" button.

The "**Assigned Name**" section displays the list of staff names assigned to the schedule for that date.

Click on the desired staff person's name to view their schedule for the day.

Search for an open appointment slot in the lower half of the screen.

If there is a blank row on the "**Daily Clinic Schedule**," signifying an open appointment slot, you may use this time slot to schedule the walk-in. If there are no open slots, you must create one.

Click on the "Insert Record" icon to create a new row.

You will then need to enter the "**Start Time**" field for this appointment time.

Set the "End Time" of the appointment just before the one you are creating so that it is the same as the start time of the appointment you are creating.

This is done so the new appointment does not start before the one before it ends.

Enter the client's "WIC ID" number.

If this is a new client, you will first need to complete the client demographics and prescreening data for them in order to get a temporary WIC ID number.

Tab to the "Appt Type" field and select the appointment type from the drop down list, if needed.

- If this is a newly created schedule row, you must select an appointment type from the drop down list
- If you are using an existing slot, and it already has the correct appointment type in the field, there is no need to change it.
- If the appointment type field is populated, but the appointment type is not correct, select the correct appointment type from the drop down list
- When an appointment type is selected, the end time will auto fill based on the duration of the appointment as defined in the appointment types duration table.

Adjust the "Start Time" for the appointment that begins after the one you are creating.

- This is done so the next appointment does not start before the one you are creating ends.
- If you are adding the appointment to the end of the day, there will be no next appointment.

Tab to the "Status" field and select "WI (Walk In)" from the drop down list.

- The "**Walk In**" status means the same thing as "**Kept**."
- Using the "**Walk In**" status instead of "**Kept**" allows the system to track and report on the number of Walk In appointments done in the clinic.

In the "Actual Staff" column, you can select the name of the staff person if you know who will be seeing this client. Otherwise, this can be left blank and the staff will document this later on the Family Appointment Record.

Save and exit.

"Refresh" to see the appointment on the "Family Appointment Record" screen.

♫ NOTE: Be sure and leave the status as "**Walk-in**" rather than "**Show**," so that your agency can track the number of walk-ins. If you change the status to "**show**" there is no way to distinguish between clients who had a scheduled appointment and those who did not.

✓ Skill Check:

Now that you have reviewed the “Daily Clinic Schedule” screen and practiced how to add a walk-in appointment, it’s time to give it a try on your own! Go to today’s “Daily Clinic Schedule” screen and add in a walk-in appointment for an existing client. When you are done, make a screen print of the “Daily Clinic Schedule” screen showing your scheduled appointment.

✍ Notes:

Chapter 4: Appointment Scheduler
Section 4: Scheduling Appointments
Lesson: Scheduling Group Screening Appointments

Objectives:

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

- schedule clients into group screening appointments.

Overview:

Group screening appointments, sometimes called "group certifications", are often used to screen and certify a group of WIC eligible clients who all belong to the same category. This group process often allows for the processing of more clients than could be done by scheduling individual appointments for them. This is especially true for clients new to WIC who need an orientation to the program.

Group screening appointments can easily be scheduled with the TWIST system using the same process as for other appointment types. Let's look at the "Group Screening" screen and see how easy it is!

Instruction:

Reviewing the "Group Scheduling" Screen

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Group Maintenance ⇨ Group Screening

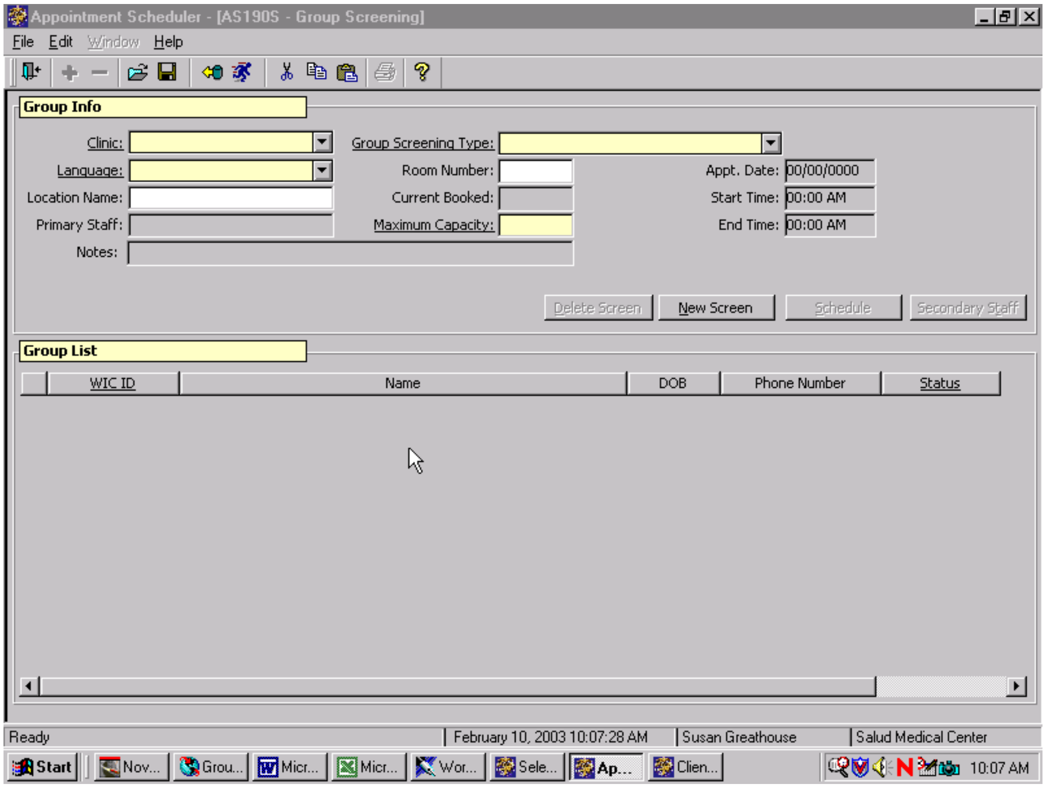

Figure 1: "Group Screening" Screen

- There are two parts to this screen, "**Group Info**" at the top, which displays information about the Group Screening appointment, and "**Group List**," which displays information about those clients scheduled to attend the appointment.
- The "**Group Info**" section is completed by the scheduling person in your local agency and booked into specific appointment slots on the "**Daily Clinic Schedule**."

When you are using the "**Group Screening**" screen for scheduling, you will be using the "**Group List**" part of the screen, but let's briefly review the "**Group Info**" section so you know what information is available.

1. **Review the "Group Info" section.**

   1.1 The "**Clinic**" field indicates the clinic at which the screening appointment will be held.

   1.2 The "**Group Screening Type**" field displays the type of group screening appointment (e.g., new child certification, new pregnant woman certification, etc.)

1.3 The "**Language**" field is a drop-down window that allows you to select the language in which the group screening will be conducted.

1.4 If applicable, "**Room Number**" shows the room in which the appointment will be held.

1.5 The "**Appt. Date**" field displays the date on which the appointment is booked.

1.6 "**Location Name**" lists the location for this appointment.

1.7 The "**Current Booked**" field displays the number count of clients already scheduled for this appointment. As you schedule clients for this appointment, you will notice the number changes accordingly.

1.8 The "**Start Time**" field displays the time this appointment starts. This comes from the "**Daily Clinic Schedule**" screen.

1.9 The "**Primary Staff**" field displays the name of the staff person who is scheduled as the primary staff person for this appointment.

1.10 The "**Maximum Capacity**" field lists the maximum number of clients who should be booked for this group appointment.

1.11 The "**End Time**" field displays the time this appointment is scheduled to end.

1.12 The "**Notes**" field shows any notes entered relating to this screening appointment.

1.13 The buttons to the bottom right of the "**Group Info**" section, "**New Screen**," "**Schedule**," and "**Secondary Staff**" are all used by the person setting up and scheduling the screening appointments.

Scheduling a Client in a Group Screening Appointment

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Group Maintenance ⇨ Group Screening

1. **Click the "Open" icon.**

This displays the "**Select Group Screening**" pop-up.

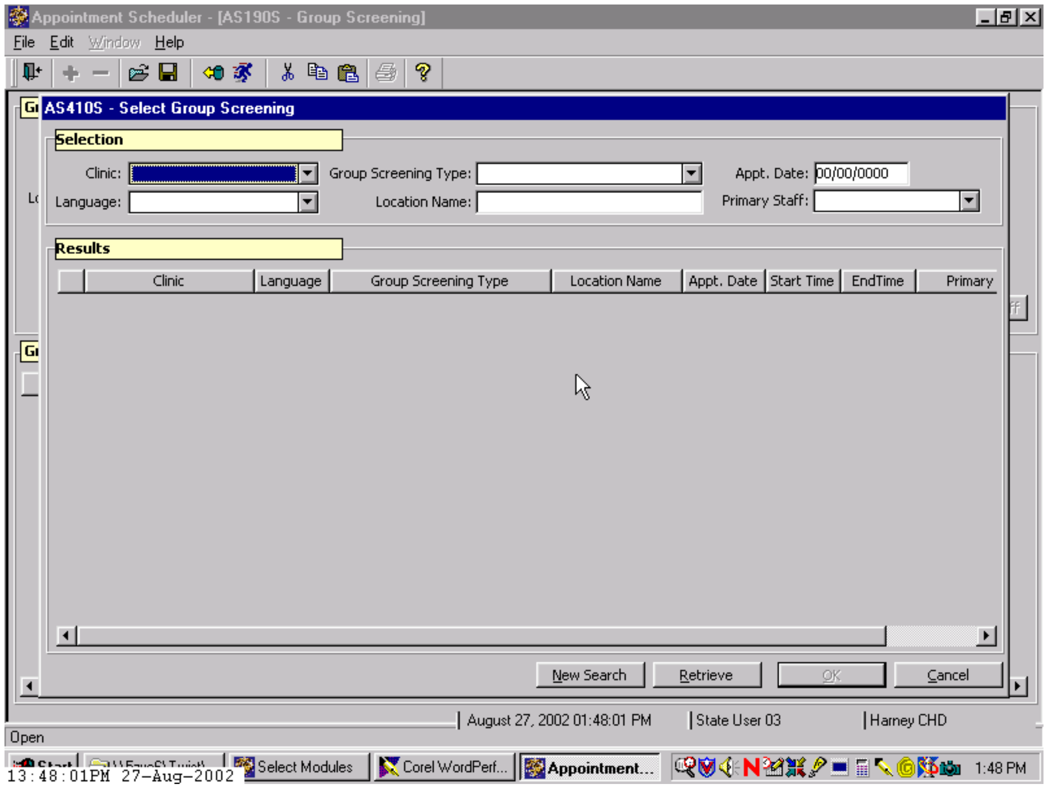

Figure 2: "Select Group Screening" Pop-Up

- This pop-up allows you to search for any scheduled group screening appointments.
- There are two sections to the pop-up: "**Selection**" and "**Results**."

2. **In the "Selection" section, enter data into the fields on which you wish to search for a group screening appointment.**

   - The more information you enter in the "**Selection**" section fields, will give you more limited results.
   - You must use at least one field from the "**Selection**" section on which to search.

3. **Click the "Retrieve" button**

4. **Double click on the appropriate screening appointment.**

   - Once you double click on the appointment line, the pop-up will close and return you to the "**Group Screening**" screen with the "**Group Info**" data populated.

- If clients have already been booked into this screening appointment, their names and corresponding information will be shown in the "**Group List**" section.

♫ NOTE: You may also click once on the desired appointment line and then click the "**OK**" button to close the pop-up and return to the "**Group Screening**" screen.

5. **Click "Insert"**

   This creates a new row for scheduling a client to this screening appointment.

6. **Enter the client's "WIC ID"**

   If you do not know the client's WIC ID, you can fast path to client master search, find and return with your client.

7. **Tab to the "Status" field.**

   - The system displays the client's "**Name**," "**DOB**," and "**Phone Number**" in the corresponding fields.
   - The system defaults the "**Status**" field to "**booked**."

8. **Save.**

   - Notice that the "**Current Booked**" field in the "**Group Info**" section has been updated to include the client you just scheduled for the appointment.
   - To continue booking other clients for this same screening appointment, tab off the "**Status**" field to create a new client row, or click the insert icon.

♫ NOTE: You cannot print vouchers from this screen. In addition, data from this screen does not appear on productivity or show rate reports.

9. **Exit.**

✂ *Tips and Shortcuts:*

The "Group Screening" screen may also be accessed from the "Daily Clinic Schedule" screen by double clicking in the "Group/Class" field corresponding to the desired group screening. When the "Group Screening" screen is entered this way it is not necessary to search for the screening you want. You are already there!

➥ Practice Activities:

Using the information on your ☛ Activity Sheet, follow the steps below to schedule your client to a group screening appointment.

The starting point for this activity is:

Appointment Scheduler ⇨ Scheduling ⇨ Group Maintenance ⇨ Group Screening

1. Click the “Open” icon.
2. In the “Selections” section, enter the corresponding data from your Activity Sheet.
3. Click “Retrieve.”
4. Double click on the screening appointment designated on your Activity Sheet.
5. Click “Insert.”
6. Enter your “WIC ID” number.
7. Tab to the “Status” field and select the status from the drop down list.
8. Save.
9. Exit the “Group Screenings” screen.

Great job! You have scheduled your client to their Group Screening appointment!

✓ Skill Check:

You are now going to schedule a client into a group screening. For the purposes of this activity, you are a WIC clerk. The person to your right will be your client. She is trying to make an appointment to put herself back on WIC. She is pregnant and will be scheduled into a group screening for pregnant women. Do a screen print of the screen that shows your client has been scheduled successfully. Good Luck!

Chapter 4: Appointment Scheduler
Section 5: Rescheduling
Lesson: Special User – Mass Rescheduling

Objectives:

Upon completion of this lesson the user will be able to:
- identify and explain the purpose of mass rescheduling; and
- perform a mass reschedule.

Overview:

In every WIC clinic, circumstances arise where you might need to reschedule all the clinic appointments for a day or for a specific staff member. The mass reschedule functions of TWIST allow you to handle these issues in one screen. The screen is clinic-specific which allows you to reschedule either an entire day's worth of appointments for a clinic or to reschedule all of the appointments from one staff member to another for any specific day.

Instruction:

Mass Rescheduling Appointments

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Manual Scheduler ⇨ Mass Reschedule

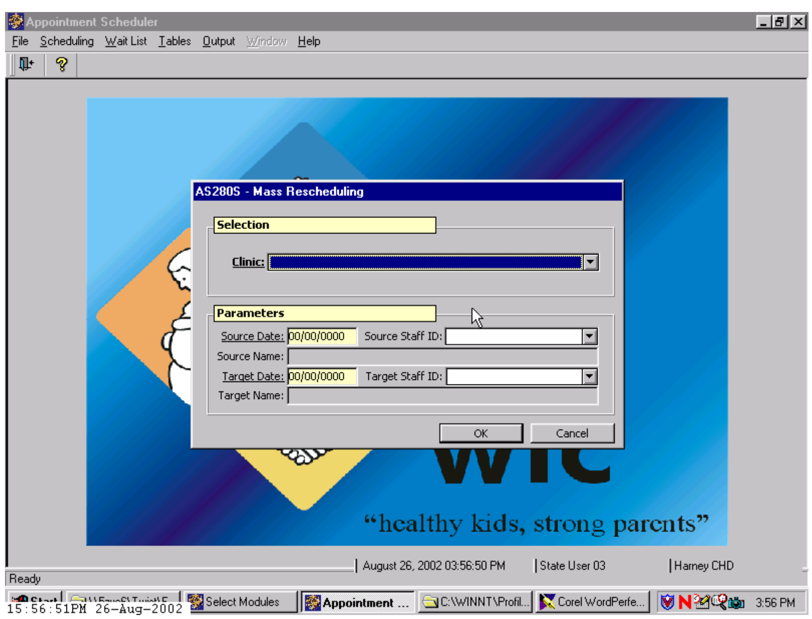

Figure 1: "Mass Reschedule" Pop-Up

1. **Select the "Clinic" for which you wish to perform a mass reschedule.**

2. **Tab to the "Source Date" field and enter the date from which the appointments are to be rescheduled.**

3. **Tab to the "Source Staff ID" field and select the staff person from whom the appointments are to be rescheduled.**

   - This field is only used if you wish to reschedule a specific staff member's appointments.
   - If this field is populated, the "**Target Staff ID**" field is also mandatory.
   - Once the "**Source Staff ID**" field is populated, the "**Source Name**" field displays the staff member's name.

4. **4. Tab to the "Target Date" field and enter the date to which the appointments are to be rescheduled.**

   The "**Target Date**" must be open and void of an existing schedule.

5. **Tab to the "Target Staff ID" field and select the staff person to whom the appointments are to be rescheduled.**

   - This field is mandatory if the "**Source Staff ID**" is populated.
   - Once the "**Target Staff ID**" field is populated, the "**Target Name**" field displays the staff member's name.

6. **Click the "OK" button to mass reschedule the appointments and close the pop-up.**

   Click the "**Cancel**" button to close the pop-up without saving any changes or rescheduling any appointments.

➥ *Practice Activity #1:*

The starting point for this activity is:

Appointment Scheduler ⇨ Scheduling ⇨ Manual Scheduler ⇨ Mass Reschedule

1. Select the "Clinic" from the drop down list.
2. Enter the "Source Date" from which you wish to reschedule.
3. Enter the "Target Date" to which you wish to reschedule.
4. Click the "OK" button to reschedule the appointments.

Replacing Staff Appointments

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Manual Scheduler ⇨ Replace Staff

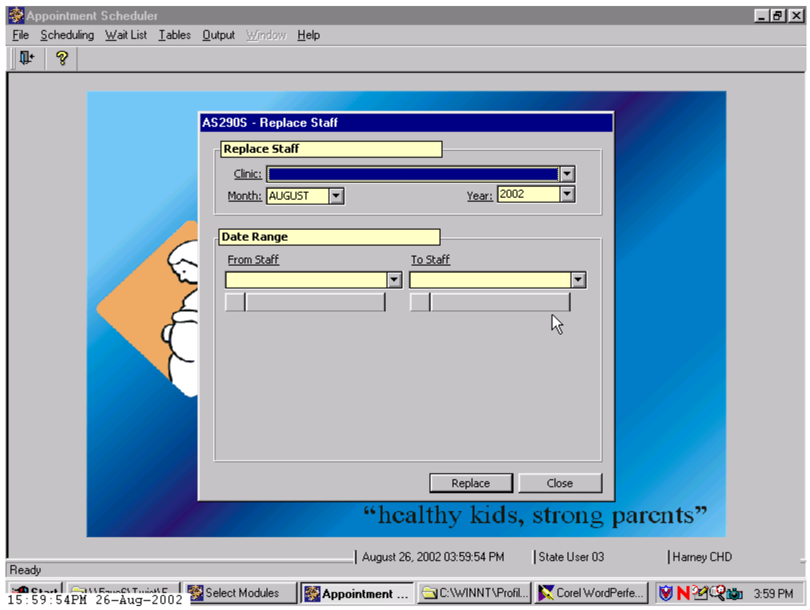

Figure 2: "Replace Staff" Pop-Up

1. **Select the "Clinic," "Month," and "Year" from which you wish to replace staff appointments.**

2. **Tab to the "From Staff" field and select the staff member whose schedule you wish to replace.**

   Once this field is selected, the system displays all current and future schedule dates within the selected month for this staff member.

3. **Tab to the "To Staff" field and select the staff member to whom you wish to assign the schedule.**

   - The assigned risk level of the "**To Staff**" person must be greater than or equal to the assigned risk level of the "**From Staff**" person.
   - The "**To Staff**" person must not have an existing schedule for the days you are rescheduling.

4. **Double click on the first date you wish to reschedule.**

- The system moves the date from under the "**From Staff**" field to under the "**To Staff**" field.
- You may repeat this action for as many days within the selected month as needed.
- All appointments and non-client activities will be replaced for the staff member.
- To move a specific date back to the "**From Staff**" person, double click on that date under the "**To Staff**" field.

5. **Click the "Replace" button to reschedule the appointments and close the pop-up.**

   Click the "**Cancel**" button to close the pop-up without saving any changes or rescheduling any appointments.

➥ *Practice Activity #2:*

The starting point for this activity is:

Appointment Scheduler ➩ Scheduling ➩ Manual Scheduler ➩ Replace Staff

1. Select the "Clinic" from the drop down list.
2. Select the "Month" and "Year" from the drop down list.
3. Select the "From Staff" from the drop down list.
4. Select the "To Staff" from the drop down list.
5. Double click on the first date for which you wish to perform a staff replacement.
6. Double click on the second date for which you wish to perform a staff replacement.
7. Click the "Replace" button to perform the staff replacement.

✓ *Skill Check:*

Now it's your turn to do some mass rescheduling and staff replacement on your own. Using your own clinic schedule, mass reschedule your appointments for one day to the same day in the following month. Before you perform the reschedule, make a screen print of the "Daily Clinic Schedule" you are going to reschedule. After the mass reschedule has been completed, make a screen print of the new "Daily Clinic Schedule" showing the appointments moved to the new date.

Then, you need to replace two days of appointments for one staff member in your clinic, using the "Replace Staff" function. Make a screen print of the two days of your staff member's "Daily Clinic Schedule", perform the replacement and make a screen print of the two days "Daily Clinic Schedule" for the staff member who took the appointments.

✍ Notes:

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Chapter 4: Appointment Scheduler
Section 5: Rescheduling
Lesson 2: Rescheduling an Appointment

Objectives:

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

- understand the business rules related to rescheduling all types of appointments; and
- reschedule an appointment from a variety of screens.

Overview:

Rescheduling client appointments is an every day occurrence in the WIC clinic and TWIST makes the process quick and easy, and helps you keep records on the rescheduled appointments.

Rescheduling an individual can be done in two ways. One way to do this is to start in the "Family Appointment Record" screen and use the "Find Appointment" button to find the client a new appointment. Another way is to select the schedule of the staff person in the " Daily Clinic Schedule" screen. We will explore both ways. There is also a "mass reschedule" function with the TWIST System that allows you to move an entire clinic or staff person's appointments all at one time. Mass rescheduling is covered in a different lesson.

Up to three family members who have coordinated appointments can all be rescheduled at the same time, and the system will find blocks of appointments for you to choose from in order to reschedule all the family members.

Instruction:

Rescheduling an Appointment from the "Family Appointments" Screen

This is the preferred method for rescheduling an appointment. Using this screen for rescheduling allows the user to search for the appointment by client name rather than knowing the exact date and staff member assigned to the appointment. It also gives the user a chance to look at other family member appointments and requests.

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Family Appointment Record

1. **Find your client and return with them to the "Family Appointment Records" screen.**

2. **In the "Client Appointments" section, locate the appointment you wish to reschedule, and check the corresponding "Select" checkbox.**

   The "**Reschedule**" button is activated. If you need to get more client information, double-click in the "WIC ID" field to view the "Client Information" pop-up.

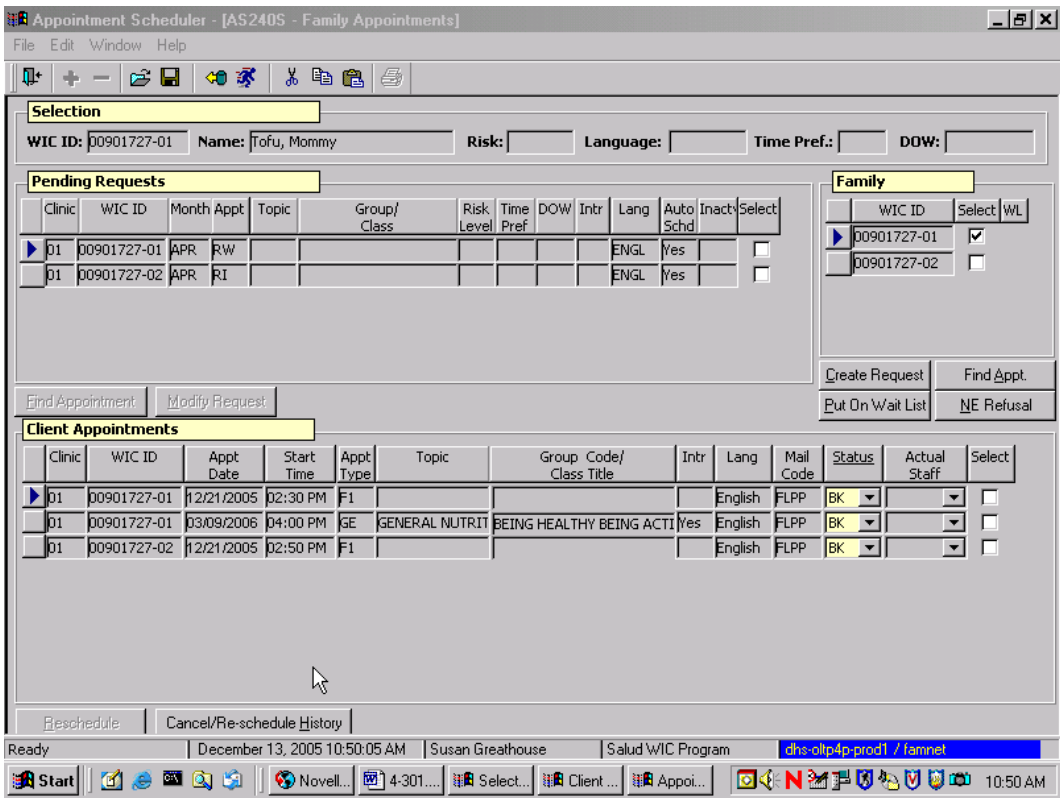

Figure 1: "Family Appointments" Screen

3. **Click the "Reschedule" button to bring up the "Find Appointment" pop-up.**

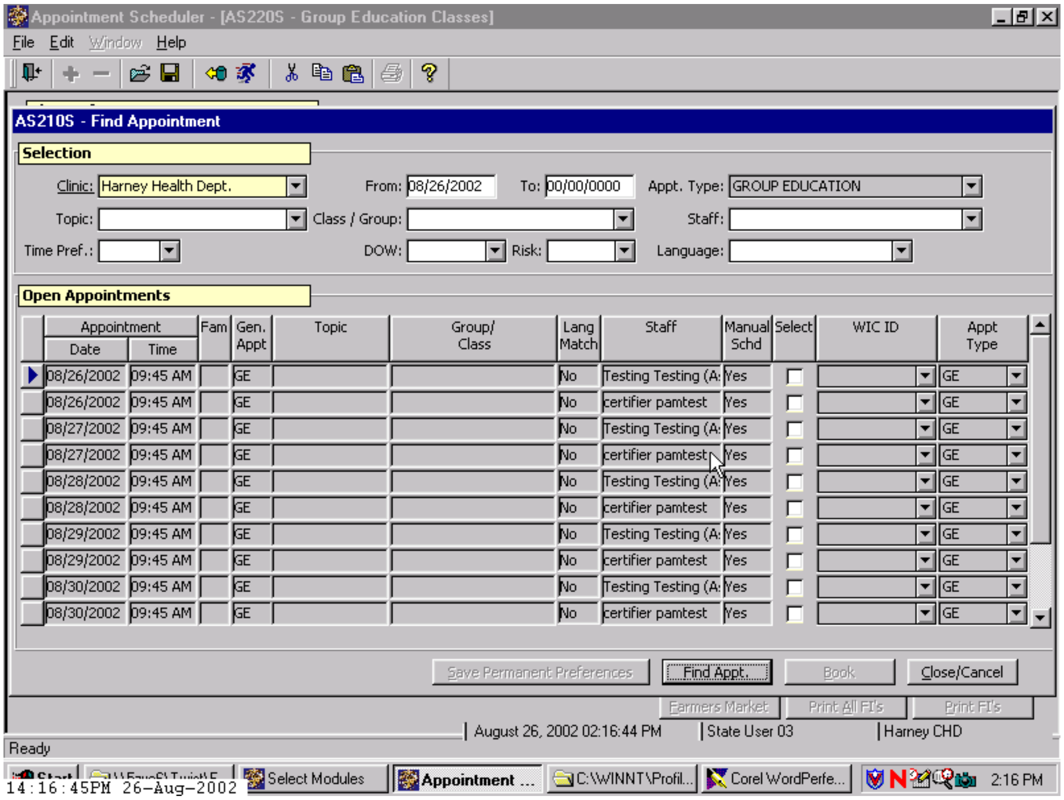

Figure 2: "Find Appointment" Pop-Up

4. **In the "Selection" section, select the "Clinic" from the drop down list and enter any other needed selection criteria.**

   - The system defaults the "**Clinic**," "**Appt. Type**," and "**Staff**" fields in the "**Selection**" section to the same values as the appointment being rescheduled.
   - To change these values, click on the corresponding drop down list and select the new value desired.

5. **Click the "Find Appt." button.**

6. **Locate the appointment date, time and type to which you wish to reschedule to.**

7. **Click the "Select" checkbox that corresponds to the desired appointment.**

   - The system fills in the "**WIC ID**" field with your client's ID number and the "**Book**" button is activated.

- If the appointment type chosen is a generic appointment type, you must use the drop down in the "**Appointment Type**" field to select the real appointment type you want in the client's record.

8. **Click the "Book" button to schedule the appointment for this client and return to the "Family Appointments" screen.**

   - The new appointment is displayed in a separate row with the "**Status**" of "BK (booked)."
   - The rescheduled appointment row is cleared on the "**Daily Clinic Schedule**" screen and the "**Status**" changes to "OP (Open)."
   - The rescheduled appointment is captured in the client record under the "**Cancel/Reschedule History**" button, which is now activated.
   - The system changes the "**Status**" field of the rescheduled appointment to "RS (Rescheduled)."

9. **Save.**

10. **Exit.**

✂ *Tips and Shortcuts:*

Up to three family members can be rescheduled at the same time. To accomplish this, in the "**Client Appointments**" section, click the "**Select**" checkbox beside each appointment you wish to reschedule. Follow steps 3 through 10 above to reschedule appointments.

- In the "**Selection**" area of the "Find Appointment Screen" DO NOT use appointment type as a selection criterion. Since you are rescheduling multiple appointment types, you do not want to limit your search.

- Once you select an appointment, the WIC ID of client 01 will fill into the "**WIC ID**" field. Use the drop down in this field to choose the correct participant for each appointment.

- If the appointment type chosen is a generic appointment type, you must use the drop down in the "**Appointment Type**" field to select the real appointment type you want in each client's record.

- Hit the "Refresh" icon if you don't see your rescheduled appointment in the "Family Appointment Record" screen.

➥ *Practice Activity #1:*

Using the information on your ☛ Activity Sheet, follow the steps below to reschedule appointments for your client by using the Family Appointments screen.

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Family Appointment Records

1. Find and retrieve your client's record and return with it to the "Family Appointments" screen.
2. In the "Family" section, click the "Select" checkbox corresponding to your client's WIC ID.
3. In the "Client Appointments" section, locate the appointment you wish to reschedule and click the corresponding "Select" checkbox.
4. Click the "Reschedule" button to display the "Find Appointment" pop-up.
5. Select the "Clinic" and any other needed selection criteria.
6. Click the "Find Appt." button.
7. Locate the new appointment you wish to reschedule.
8. Click the corresponding "Select" checkbox.
9. After the system populates the "WIC ID" row with your client's ID number, click the "Book" button.
10. Save.
11. Exit.

Rescheduling an Appointment from the "Daily Clinic Schedule" Screen

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

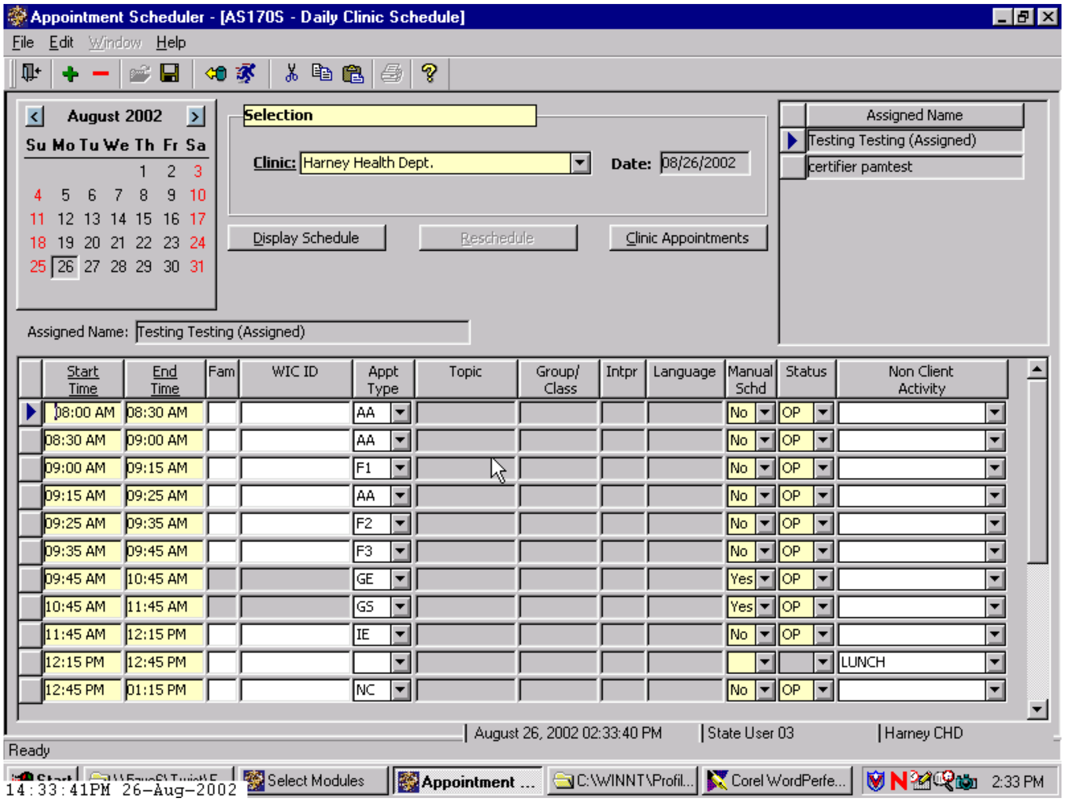

Figure 3: "Daily Clinic Schedule" Screen

1. **Click on the "Clinic" drop down arrow and select the clinic for which you wish to view the schedule.**

2. **On the Calendar, select the date/month and year corresponding to the date for which you wish to reschedule the appointment.**

3. **Click the "Display Schedule" button.**

4. **In the lower half of the screen, locate the appointment you wish to reschedule.**

   - You may need to click on another "**Assigned Name**" to locate the staff person assigned to this appointment.

   - If you need to get more client information, double-click in the "**WIC ID**" field to view the "**Client Information**" pop-up.

5. **Click on the row corresponding to the appointment to be rescheduled.**

6. **Click on the "Reschedule" button, which is now activated.**

The "Find Appointment" pop-up is displayed.

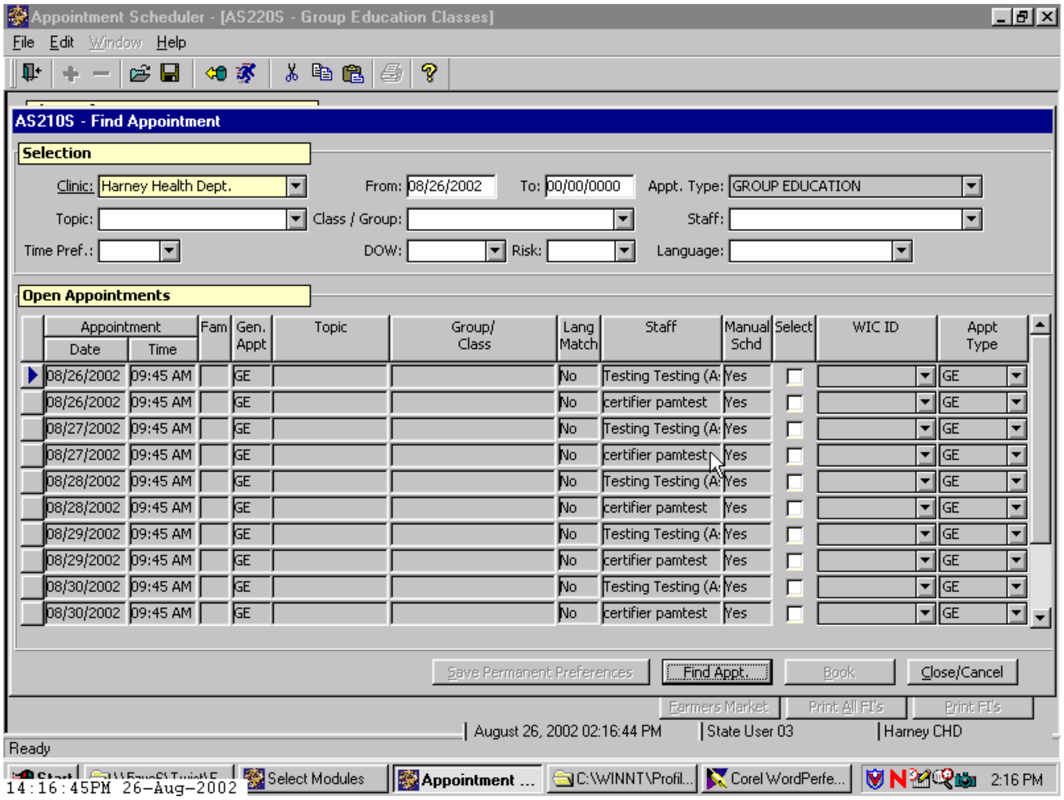

Figure 4: "Find Appointment" Pop-Up

♫ NOTE: Please refer to the previous section, "Rescheduling an Appointment from the Family Appointments Screen" for further instruction on the functions of this pop-up.

7. **Reschedule the appointment in the same manner as you did for "Rescheduling an Appointment from the Family Appointments Screen."**

   - The rescheduled appointment row is cleared and the "**Status**" changes to "OP (Open)."
   - On the "Family Appointments" screen, the new appointment is displayed with the "**Status**" of "BK (booked)."
   - The rescheduled appointment is captured in the "**Cancel/ Reschedule History**" area, for which the button is now activated.

8. **Save.**

9. **Exit.**

✂ Tips and Shortcuts:

You can also use the "cut and paste" function in Windows to reschedule a client's appointment from the Daily Clinic Schedule. Simply put your cursor on the client's ID number in the Daily Clinic schedule and click on the "cut" or scissors icon to remove that appointment. Then select the appointment slot where you want to reschedule the client, click on the open WIC ID field, and click on the "paste" icon. You may need to change the appointment type to fit with the original appointment type for that client. You can "paste" the appointment to a different time for the same date and staff, to a different staff person, to a completely different date and staff, and even to another clinic within your agency.

♫ NOTE: When using this method to reschedule a client's appointment, the reschedule is not documented in the "cancel/reschedule history" pop-up. If your agency needs to have clear documentation of this, you might choose not to use this scheduling option. Also remember that you must "paste" the client into a new appointment once you have "cut" out the old one, or the client will not be scheduled anywhere.

↪ Practice Activity #2:

Using the information on your ☛ Activity Sheet, follow the steps below to reschedule appointments for your client from the "Daily Clinic Schedule" screen.

The starting point for this section is: Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

1. Select the "Clinic" from the drop down list.
2. Select the appointment date on the calendar.
3. Click the "Display Schedule" button.
4. In the "Assigned Name" section, click on the staff person assigned to the appointment to view their schedule.
5. In the lower half of the screen, locate the appointment you wish to reschedule.
6. Click on the row corresponding to the appointment to be rescheduled.
7. Click the "Reschedule" button to bring up the "Find Appointment" pop-up.
8. Reschedule the appointment the same way as you did for "Rescheduling an Appointment from the Family Appointments Screen."
9. Save.
10. Exit.

✓ Skill Check:

Now you are going to reschedule appointments for your client. You are the WIC client and you already have several appointments scheduled. First, reschedule an appointment from the "Family Appointments" screen. Then, reschedule an appointment from the "Daily Clinic Schedule" screen. You will need to know your appointment date and assigned staff person before you enter the Daily Clinic Schedule, so make sure you note this appointment in the "Family Appointments" screen if you do not already have this information.

Print out a "Family Appointments" screen print showing the rescheduled appointment.

✍ Notes:

Chapter 4: Appointment Scheduler
Section 5: Rescheduling
Lesson: Canceling an Appointment

Objectives:

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

- cancel a client's existing appointment and/or appointment requests and document status; and
- correctly identify and describe the "Appointment Status" field and codes.

Overview:

There are times in the WIC clinic that you need to simply cancel a client's appointment and not reschedule. The TWIST system allows you to quickly locate the appointment, cancel it and keep a record of the cancellation in the client's appointment history.

There are also times when you will need to cancel an appointment request so the Automatic Scheduler doesn't needlessly schedule an appointment for a client who does not need it. This is also easily done in TWIST.

Instruction:

Canceling an Appointment from the "Family Appointment Record" Screen

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Family Appointment Record

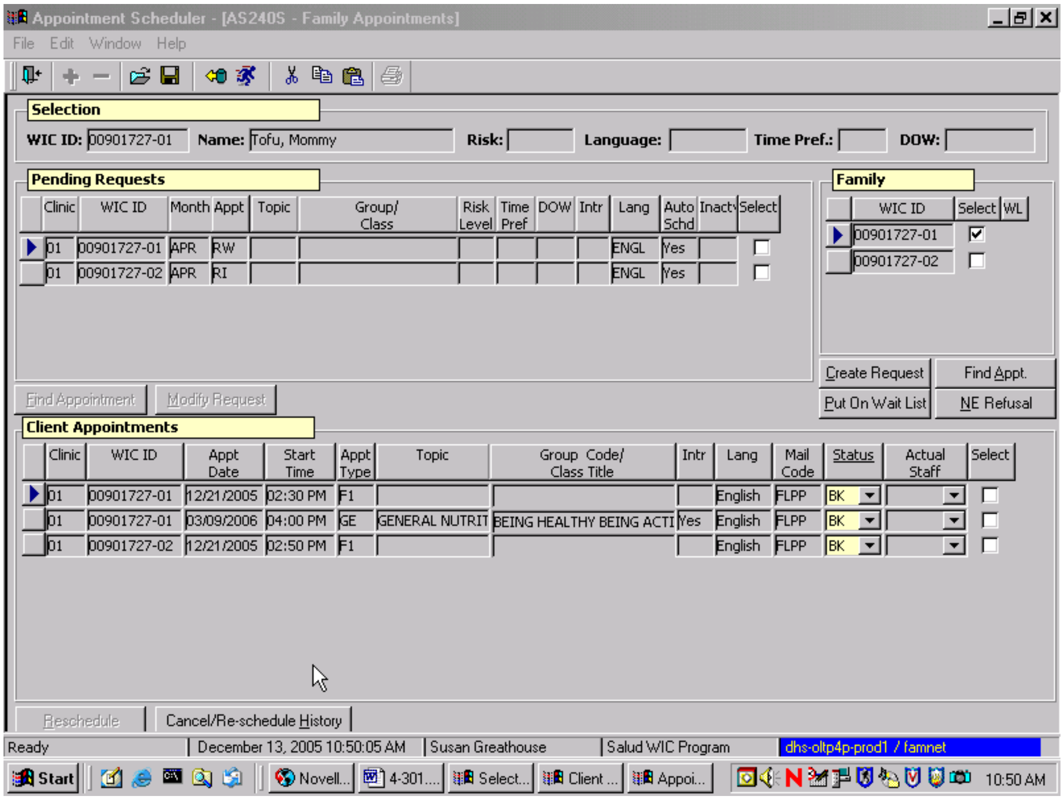

Figure 1: "Family Appointments" Screen

1. **Retrieve the client for whom you wish to cancel an appointment.**

2. **In the "Client Appointments" section, locate the appointment you wish to cancel, and click in the "Status" field.**

2.1 The "Status" field displays the current status of the appointment.

2.2 The Status codes include:

- **BK** (Booked), which means the appointment has been assigned to a client;
- **NS** (No Show), which means the client missed their appointment;
- **SH** (Show), which means the client has kept their appointment; and
- **CN** (Cancel), which means that the appointment has been canceled. This code can only be used if the appointment is canceled prior to the scheduled appointment.

3. **Select "CN (Cancel)" from the drop down list.**

You will see a pop-up explaining that cancel will clear the appointment from client's record and re-open it to the scheduler. A record of the cancel will be kept in the client's record in the "Cancel/Reschedule History" screen.

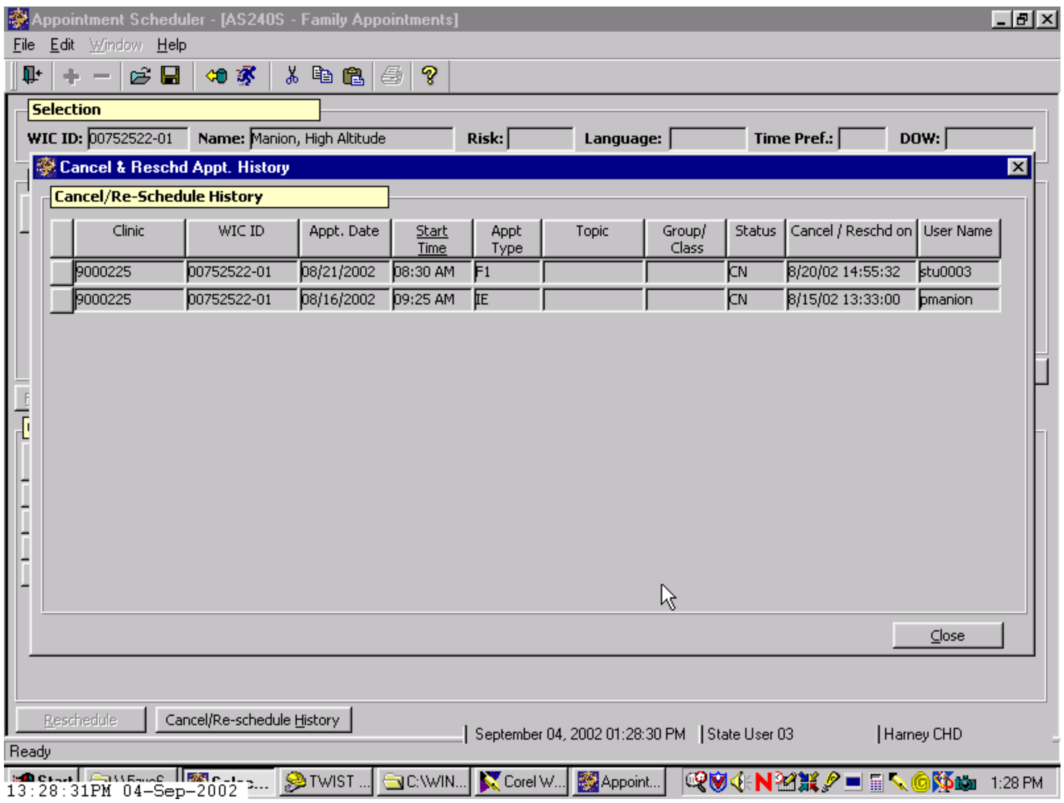

Figure 2: "Cancel/Reschedule History" Screen

4. **Save.**

5. **Exit.**

Canceling an Appointment Request from the "Family Appointment Record" Screen

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Family Appointment Records

1. **Retrieve the client for which you wish to cancel an appointment request.**

2. **In the "Pending Requests" section, click the "Select" checkbox on the request you wish to cancel.**

The “Find Appointment” and “Modify Request” buttons become activated.

3. **Click the “Modify Request” button.**

The “Appointment Request” pop-up is displayed.

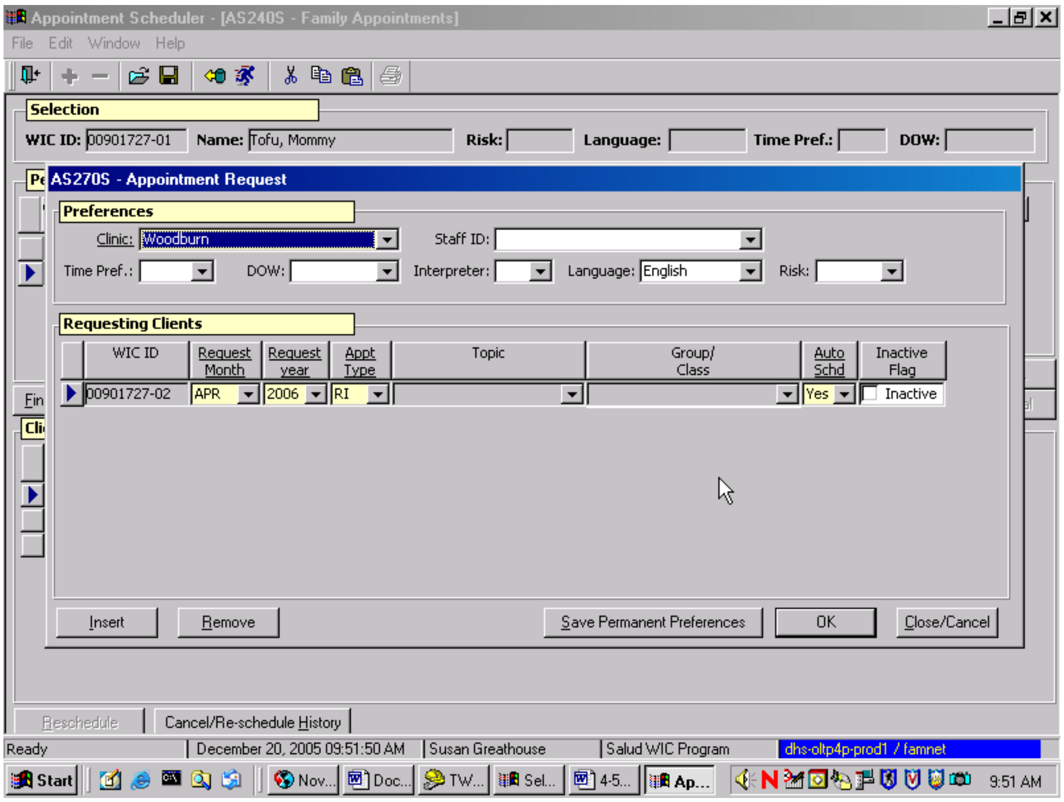

Figure 3: “Appointment Request” Pop-Up

4. **Click the “Remove” button.**

The system will display the message, “Are you sure you wish to remove this row?”

5. **Click “Yes.”**

The request is deleted.

6. **Click “OK” to return to the “Family Appointments” screen.**

7. **Exit.**

➥ *Practice Activity #1:*

Using the information on your ☛ Activity Sheet, follow the steps below to cancel appointments and appointment requests for your client by using the "Family Appointment Record" screen.

The starting point for this activity is:

Appointment Scheduler ⇨ Scheduling ⇨ Family Appointment Record

1. Retrieve the client for whom you wish to cancel an appointment.
2. In the "Client Appointments" section, locate the appointment you wish to cancel and click on the drop down list to change the status to "CN."
3. Save, but do not exit the screen.

Now let's practice canceling an Appointment Request!

1. In the "Pending Requests" section, locate the appointment request you wish to cancel and click the corresponding "Select" checkbox.
2. Click the "Modify Request" button.
3. Click the "Remove" button.
4. Click "Yes" to respond to the message, "Are you sure you wish to remove this row?"
5. Click "OK" to save the cancellation.
6. Exit.

Canceling an Appointment from the "Daily Clinic Schedule" Screen

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

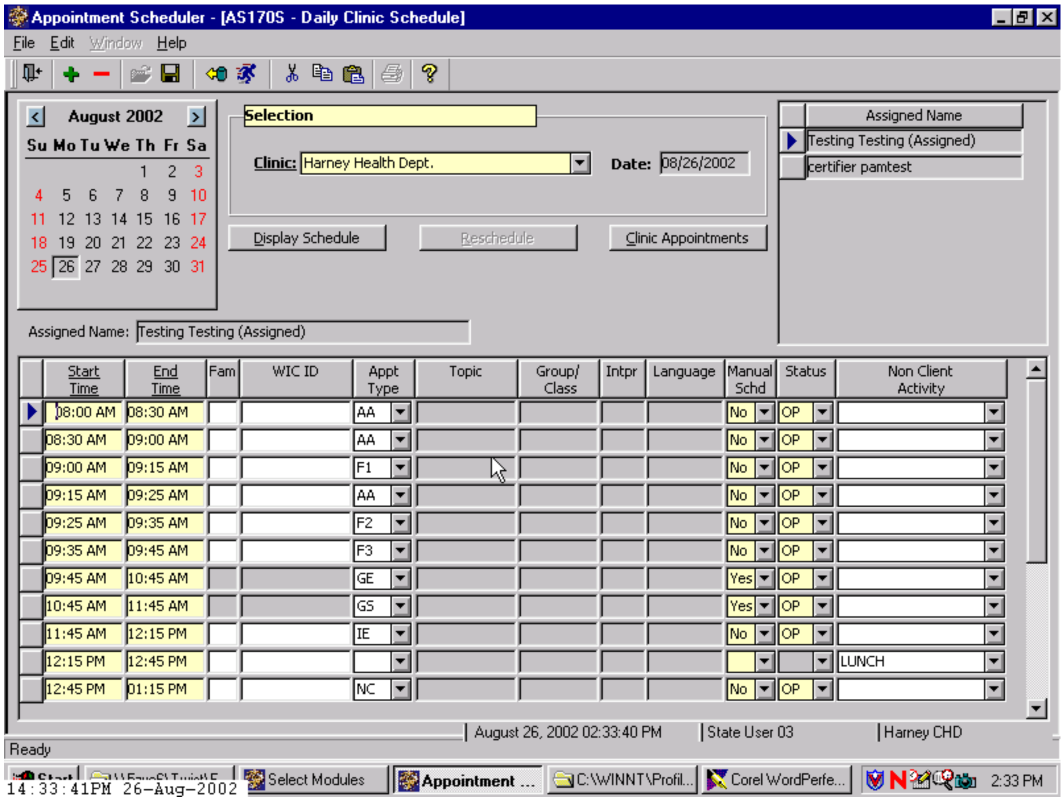

Figure 4: "Daily Clinic Schedule" Screen

♫ NOTE: Please refer to the "Daily Clinic Schedule" lesson for further instruction on the functions for this screen.

1. **From the "Clinic" drop down, select the clinic for which you wish to view the schedule.**

2. **On the Calendar, click on the date/month and year corresponding to the date for which you wish to cancel the appointment.**

3. **Click the "Display Schedule" button.**

4. **In the lower half of the screen, select the appointment you wish to cancel.**

   - You may need to scroll and/or click on another "Assigned Name" to locate the staff person assigned to this appointment.
   - If you need to view more client information, double-click in the "WIC ID" field to view the "Client Information" pop-up.

5. **Change the "Status" field to "Cancel."**

This records the cancellation of the appointment in the “Cancel/Reschedule History” screen, which is accessed from the “Family Appointment Record” screen.

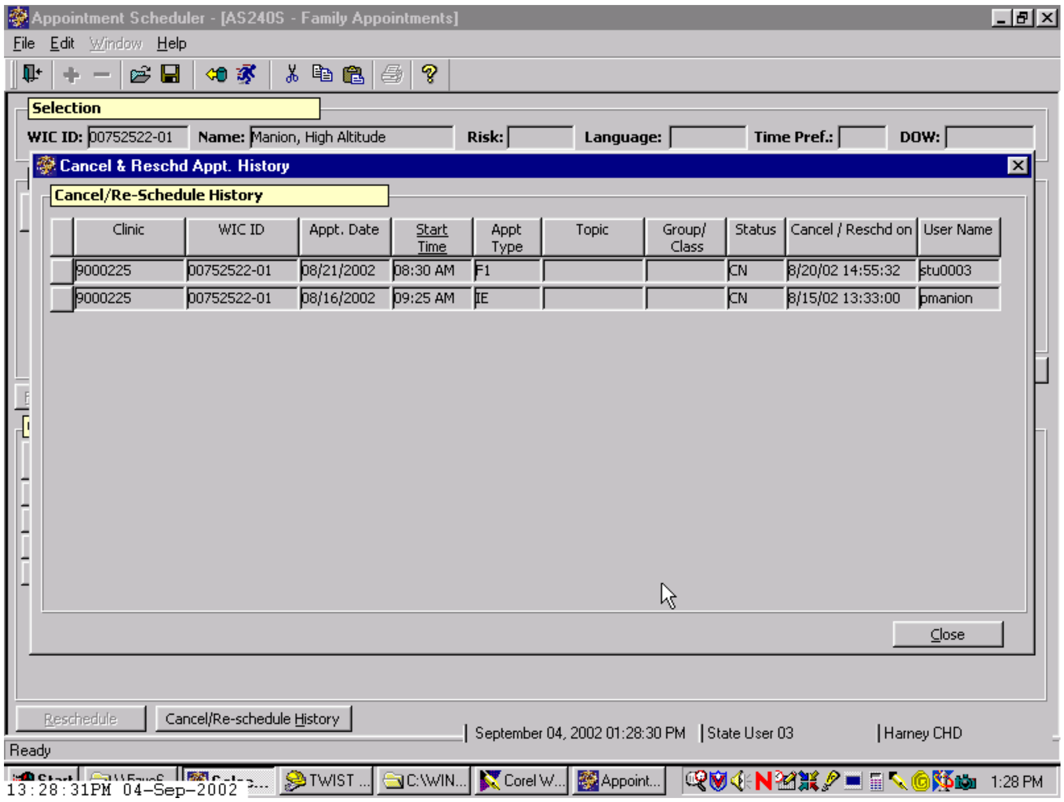

Figure 5: “Cancel/Reschedule History” Screen

7. **Save.**

   The system automatically changes the “Status” field from “BK (Booked)” to “OP (Open).”

8. **Exit.**

➥ *Practice Activity #2:*

Using the information on your ☛ Activity Sheet, follow the steps below to cancel appointments for your client from the “Daily Clinic Schedule” screen.

The starting point for this activity is:

Appointment Scheduler ⇨ Scheduling ⇨ Daily Clinic Schedule

1. Select the “Clinic” from the drop down list.
2. Click the appointment date on the calendar.

3. Click the “Display Schedule” button.
4. In the “Assigned Name” section, click once on the staff person assigned to the appointment to view their schedule.
5. In the lower half of the screen, select the appointment you wish to cancel.
6. Change the “Status” to “cancel.”
7. Save.
8. Exit.

✓ *Skill Check:*

1. You are answering the phones in the WIC clinic and a client calls to cancel her appointment. Cancel her appointment and *print the screen that shows the appointment cancellation.*

2. You are scheduling appointments in the “Daily Clinic Schedule.” You accidentally schedule a client for the wrong day. Cancel her appointment. *Print the “Daily Clinic Schedule” screen before and after you cancel her appointment.*

✍ Notes:

Chapter 4: Appointment Scheduler
Section 6: Attendance Documentation
Lesson: Documenting Appointment Attendance

Objectives:

Upon completion of this lesson the user will be able to:
- document appointment attendance for individuals and groups; and
- correctly define appointment scheduling terms.

Overview:

Maintaining an accurate appointment book is crucial to a well-run WIC clinic and documenting appointment attendance is a major part of maintaining your appointment book. Additionally, documenting appointment attendance will make show rate reports accurate and will allow the clinic manager to run staff productivity reports. In TWIST, documentation for individual appointment attendance is done manually as part of the certification process.

At the end of the day all individual appointments that have not been documented as “show” will be documented automatically as a “no show.”

Class attendance is documented as a group process on the “group education classes’ screen, so individual records do not need to be accessed to document class attendance. You can print clients FIs directly from the GE Class screen.

Group screening appointment attendance is documented in the same way as an individual appointment, since certification documentation must be done on each individual record. A group screening is sometimes referred to as a “group certification.” You cannot, however, print FIs directly from the Group Screening screen. You must go to the Family Summary Screen to print FIs from here.

Instruction:

Documenting Individual Appointment Attendance

The usual flow will be for the certifier to document individual appointment attendance through the “NE Plan” screen as part of each certification/recertification appointment.

The starting point for this section is:

Client Processes ⇨ Certification ⇨ NE Plan ⇨ Next Appointment

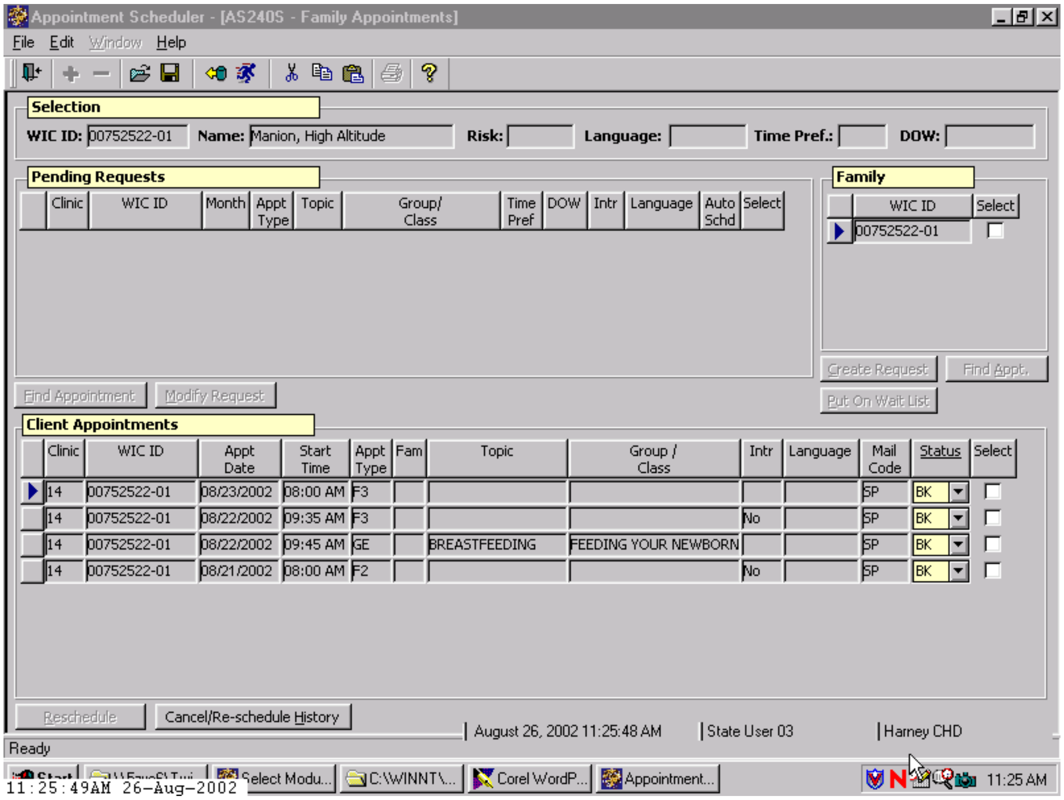

Figure 1: Family Appointment Record

1. **Using the "Open" icon, search for and return with the client for whom you wish to document attendance.**

   - Normally you would have the client record open and this would just be a continuation of the certification appointment.

2. **Click the "Schedule Appointment" button which takes you to the "Family Appointment Record."**

3. **In the "Client Appointments" section of the screen, locate the appointment for which you wish to document attendance.**

4. **In the "Status" field for this appointment, select "Show."**

5. **In the "Actual Staff" field select the name of the staff person who actually saw the client from the drop down list.**

6. **Save.**

7. **Exit "Family Appointment Record."**

♬ NOTE: Individual appointment attendance can also be documented by going directly to the "Family Appointment Record" and retrieving the client. The clerk may also "show" the client through the "Daily Clinic Schedule" and by selecting the "Actual Staff" name if they know who will be seeing the client.

Documenting Attendance for a Group Education Class

The starting point for this section is

Appointment Scheduler ⇨ Scheduling ⇨ Group Education Classes

♬ NOTE: Please refer to the "Schedule a Client into a Nutrition Education Group Appointment" lesson for more detailed information about this screen.

1. **Click the "Open" icon to search for and retrieve the class for which you wish to document class attendance.**

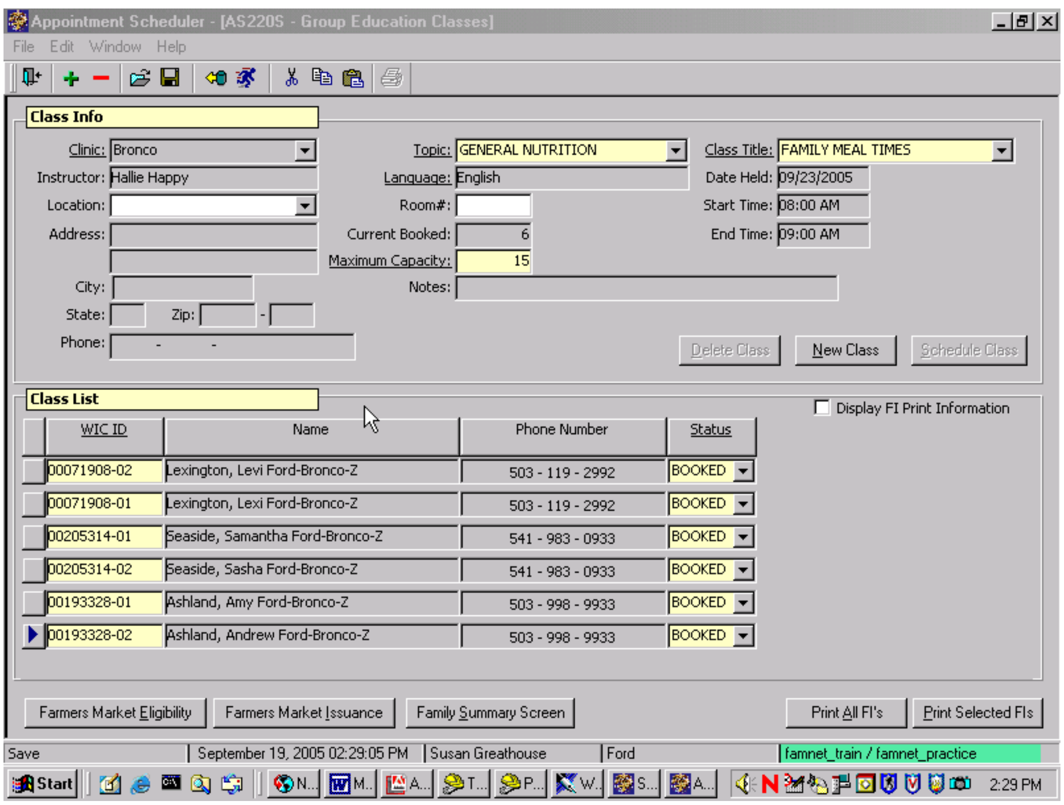

Figure 2: "Group Education Classes" Screen

2. **Change the "Status" field from "Booked" to "Show" for all clients listed in the "Class List" section who came to the appointment.**

- Use the drop down list in the "**Status**" field to change the attendance status to "**Show**."
- It is not necessary to change the Status to "**No Show**" for those clients who did not keep the appointment. This will be automatically changed by the system during the End of Day processes.

3. When you have finished documenting attendance for the whole class, click the "**Display FI Print Information**" check box.

- A message saying "**Calculating FI Print Information**" will display while TWIST retrieves FI information. This process may take up to a minute depending on the size of the GE Class.
- TWIST will display the date of the last month FIs were issued and the number of printable FIs for each client in the class.
- The "**Print FIs**" checkbox will automatically be checked by the system for each client whose status is "**Show**," if they have printable FIs within the next 3 months.

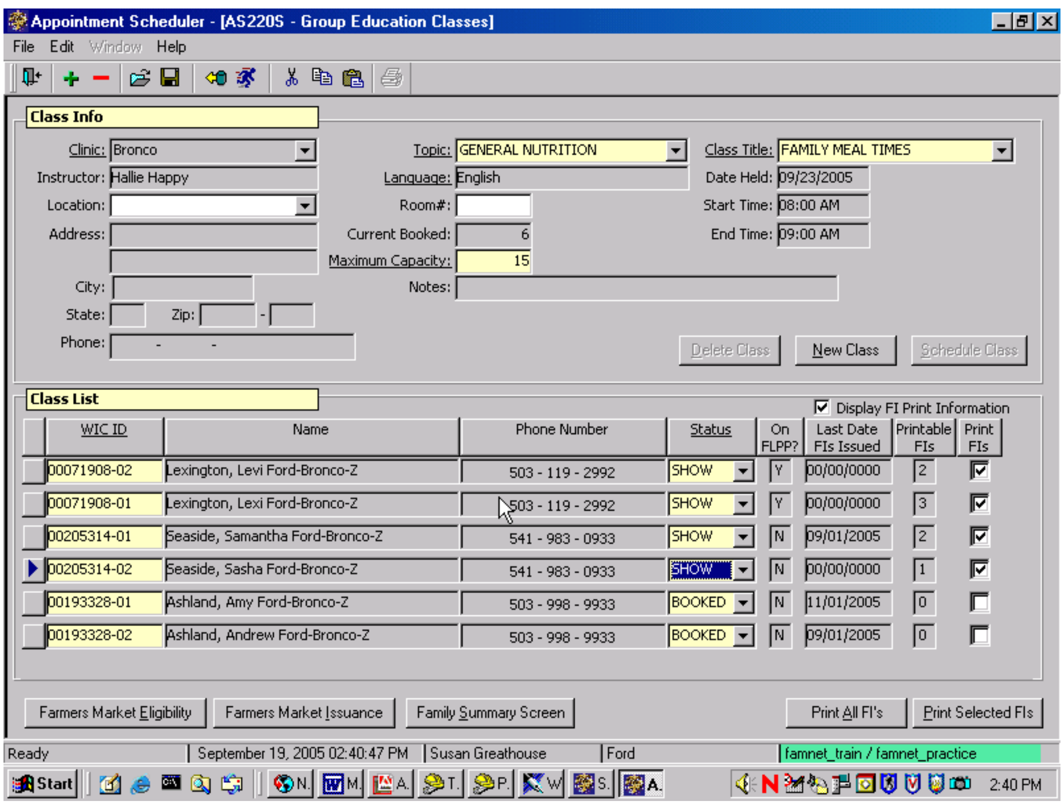

Figure 3: FI Print Information

4. **Review any client's FI printing information by selecting the client and clicking on the "Family Summary Screen" button at the bottom of the screen.**

- This allows you to verify the number of printable FIs for each family member.
- If there is a discrepancy in the number of printable months between family members in the class, see Chapter 5, Lesson 102, *Printing FIs – Printing from a Group Education Class* and Chapter 3, Lesson 1100, *Family Summary Screen* for more information on coordinating family appointments and printing FIs.

♬ NOTE: Be sure to "Refresh" the GE Class screen if you have made any changes in the Family Summary Screen before you print FIs.

5. **Save and exit**

✓ *Skill Check:*

The "**Group Education Classes**" screen can also be accessed from the "**Daily Clinic Schedule**" by double clicking on the "**Group/Class**" field in the row the class you want is listed on.

✍ *Notes:*

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Chapter 4: Appointment Scheduler
Section 7: Correspondence
Lesson: Printing Appointment Notices (Special User and Local Agency Training)

Objectives:

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

$ understand all types of appointment scheduler correspondence;
$ use the correspondence print definition screens
$ modify the content of appointment scheduler correspondence; and
$ print appropriate appointment notices.

Overview:

There are nine different appointment notices in TWIST. Some are letters, some are postcards, and some are both. All are available in English and Spanish. Below is a list of the different notices:

Letters
Notice for Individual Appointments
Notice for Group (GS) Code Appointments
Notice of Clinic Choice to Reschedule
Notice for Group (GE) Class Appointments

Postcards
Call for an Appointment
Postcard for Group (GE) Class Appointments
Postcard for Individual Appointment
Postcard for Group (GS) Code Appointments
Wait List Notification

- Each notice contains "text lines" which allow the local agency to customize their appointment notices and send agency specific information to their clients. This information is entered in the **"Appointment Notices"** base table, which provides blank lines for each line of text that is available for each specific appointment notice. The user will enter their agency specific text onto the blank lines in the table, which will then display on the specific notice.
- There are separate notices with Spanish text for each of the nine correspondence types. Standard information is hard-coded in Spanish. The user can then enter text information in Spanish as described above.

- The appointment information (date and time) will pull from the system automatically, as will the client information and the agency information.
- Bulk notices will print for up to four family members. If more than four family members have an appointment an additional notice will be printed.
- If the appointment notice is for multiple family members, only the earliest appointment time will print on the notice.
- Individual notices will only print for the individual client selected.

In this lesson you will learn how create the text for your appointment notices and how to print appointment notices for both specific groups of clients and for individual clients.

Instruction:

Understanding Appointment Correspondence Types

The starting point for this section is:

Appointment Scheduler ± Outputs

1. **Click on "Correspondence."**

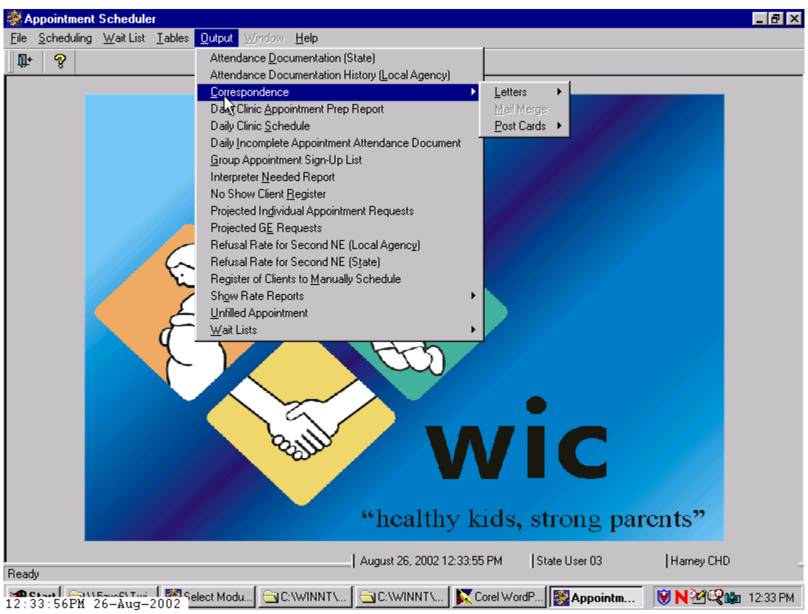

Figure 1: "Correspondence" Drop Down Menu

- There are three options, Letters, Mail Merge and Postcards. You will learn about Mail Merge in another lesson.
- There are two basic appointment notices: Letters and Postcards.
- Some types of notices may be both a letter or a postcard.

- You may select the type of notice that best meets your agency's needs.
- Specific text for each of these notices can be created by the local agency.

2. **Select "Letters" from the drop down list.**

   - There are four types of letters available: Individual Appointment, Group Screening, Clinic Reschedule and Group Nutrition Education Class.
   - The letters are also available in Spanish.

3. **Select "Postcards" from the drop down list.**

   - There are five types of postcards available: Call for an Appointment, Group Nutrition Education Class, Individual Appointment, Group Screening and Wait List Notification.
   - The postcards are also available in Spanish.

4. **Exit the menu.**

Creating Text Messages for the Notices

Before appointment notices can be printed each local agency must create their own unique message information for the notices. This in done in the "Appointment Notices" base table. Both the English and Spanish text must be entered for each type of notice.

The starting point for this section is:
Appointment Scheduler ± Tables

1. **Click on "Appointment Notices."**

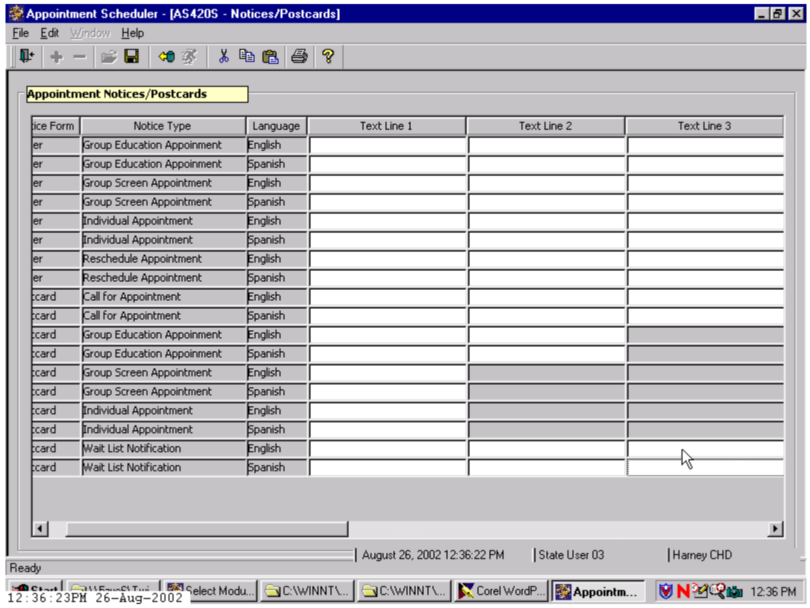

Figure 2: "Appointment Notices" Base Table

- Each row represents a separate notice, either postcard or letter, in either English or Spanish.
- Each notice displays a different number of open lines for text.
- Use the scroll bar at the bottom of the screen to move through the lines.
- Use the down arrow key on the key board to move down the list.

2. **Click in the appropriate "Text Line" field and enter your text.**

- Each line on a letter may contain up to 50 characters.
- Each line on a postcard may contain up to 38 characters.
- Lines may contain both numbers and letters.
- Use the tab key to move to the next line.
- Be sure to enter text for the Spanish correspondence in Spanish.

3. **Save and exit.**

Printing Bulk Appointment Letters

Once the text messages have been created, you will be able to print notices.

The starting point for this section is:
Appointment Scheduler ± Outputs

1. **Select "Correspondence" from the drop down list.**

   There are three options, Letters, Mail Merge and Postcards. You will learn about Mail Merge in another lesson.

2. **Select "Letters."**

3. **Select the notice you want to print.**

   3.1 The **"Correspondence Print Definition"** pop-up is displayed. This pop-up is the same for both Letters and Postcards.

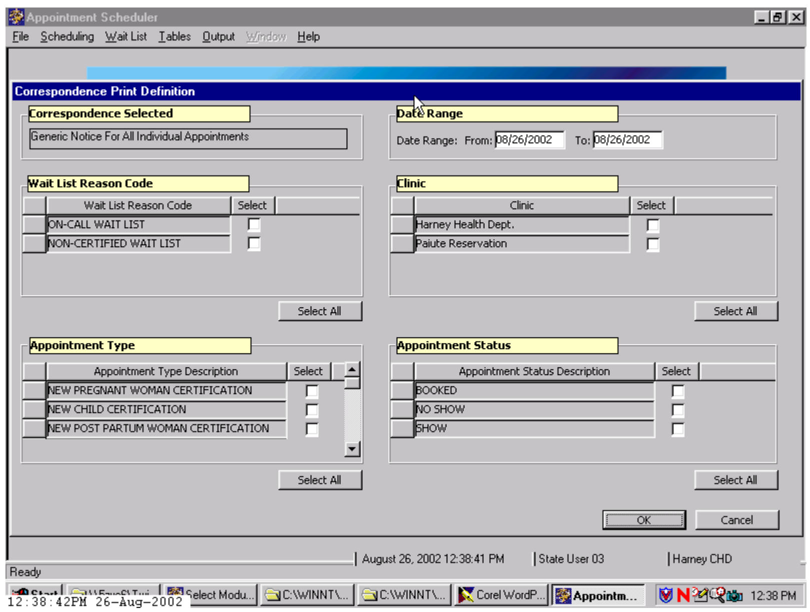

Figure 3: "Correspondence Print Definition" pop-up

   3.2 The "From" and "To" dates in the **"Date Range"** section are used to indicate which range of dates of appointments you want to print notices. The "From" and "To" date may be the same date when printing only one day.

   3.3 The **"Wait List Reason Code"** section is for the user to select a wait list for which to print a "Wait List Notification" postcard. Check "Noncertified" or "On Call" to indicate which wait list you want to print notices for.

   3.4 The **"Appointment Type"** section is for the user to indicate what type of appointment(s) you want to print notices for. You may check multiple types of appointments or click the **"Select All"** button to check all appointment types.

3.5 The clinic for which you want to print appointment notices is selected in the **"Clinic"** section. You may select multiple clinics or use the **"Select All"** button to select all clinics.

3.6 The status of appointments you want to print notices for is entered in the **"Appointment Status"** section. You may select multiple statuses or use the "Select All" button to select all statuses.

4. **Click "OK" to process print parameters or "Cancel" to close the pop-up.**

The "Notice" window is shown, with the client, clinic and appointment information displayed.

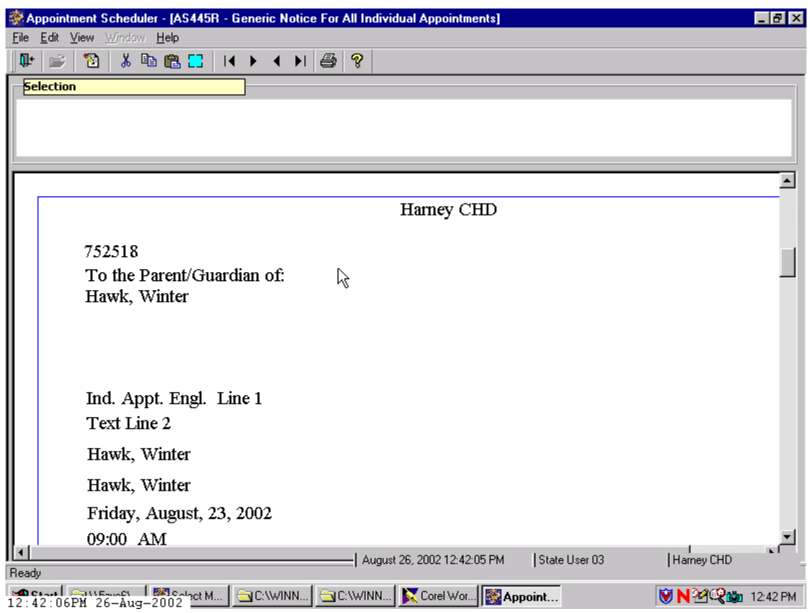

Figure 4: "Appointment Notice Letter"

- Use the scroll bar on the right to view all the clients.
- The "First," "Next," "Prior" and "Last" icons in the top tool bar may also be used to scroll through the clients.

+NOTE: If there are no clients who match the criteria entered a message will be displayed stating no data was found.

5. **Click the "Print" icon to print the notices.**

+NOTE: Letters will print on the laser printer selected as the default printer for the workstation.

+NOTE: The client's written language will be used as part of the selection criteria for appointment notices. If you select a Spanish notice only clients whose primary language is Spanish and who match the other criteria will be displayed and printed.

6. **Exit.**

Setting Up The Postcard Printer Table

Before printing appointment postcards in a FLPP environment, you must set up your Lexmark printer in the Postcard Printer table.

The starting point for this is:

Appointment Scheduler ± Tables ± Postcard Printers

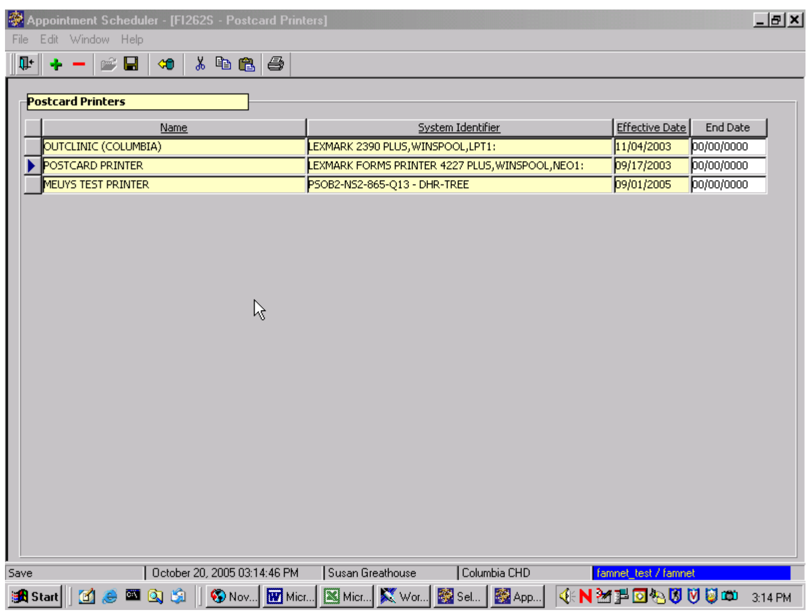

Figure 5: Postcard Printer Table

1. **Type in a name for your Lexmark postcard printer in the first column under "Name". It can be something as easy as "Postcard Printer."**

2. **In the column under "System Identifier", copy exactly the name for the Lexmark that appears in the printer settings on**

the desktop. Check with your technical support staff person if you need further assistance in setting up this printer.

3. **Click "Save" and Exit.**

+ Note: Do <u>not</u> set the Lexmark printer as your default printer on your workstation.

Printing Bulk Appointment Postcards

The starting point for this section is:
Appointment Scheduler ± Outputs

1. **Select "Correspondence" from the drop down list.**

2. **Select "Postcards."**

3. **Select the notice you want to print.**

   3.1 The **"Correspondence Print Definition"** pop-up is displayed. This pop-up is the same for both Letters and Postcards.

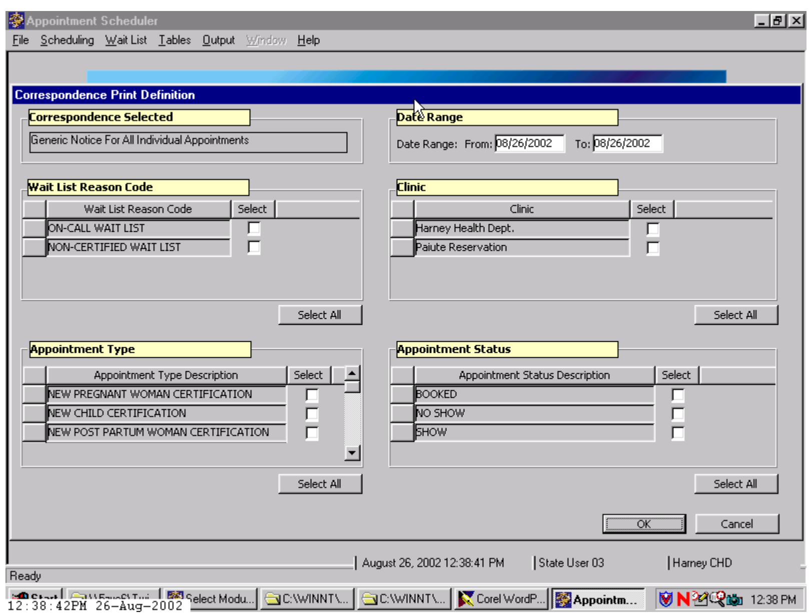

Figure 6: "Correspondence Print Definition" pop-up

   3.2 The "From" and "To" dates in the **"Date Range"** section are used to indicate which range of dates you want to print notices. The "From" and "To" date may be the same date when printing only one day.

3.3 The **"Wait List Reason Code"** section is for the user to select a wait list for which to print a "Wait List Notification" postcard. Check "Noncertified" or "On Call" to indicate which wait list you want to print notices for.

3.4 The **"Appointment Type"** section is for the user to indicate what type of appointment(s) you want to print notices for. You may check multiple types of appointments or click the **"Select All"** button to check all appointment types.

3.5 The clinic for which you want to print appointment notices is selected in the **"Clinic"** section. You may select multiple clinics or use the **"Select All"** button to select all clinics.

3.6 The status of appointments you want to print notices for is entered in the **"Appointment Status"** section. You may select multiple statuses or use the "Select All" button to select all statuses.

4. **Click "OK" to process print parameters or "Cancel" to close the pop-up.**

The "Notice" window is shown, with the client, clinic and appointment information displayed.

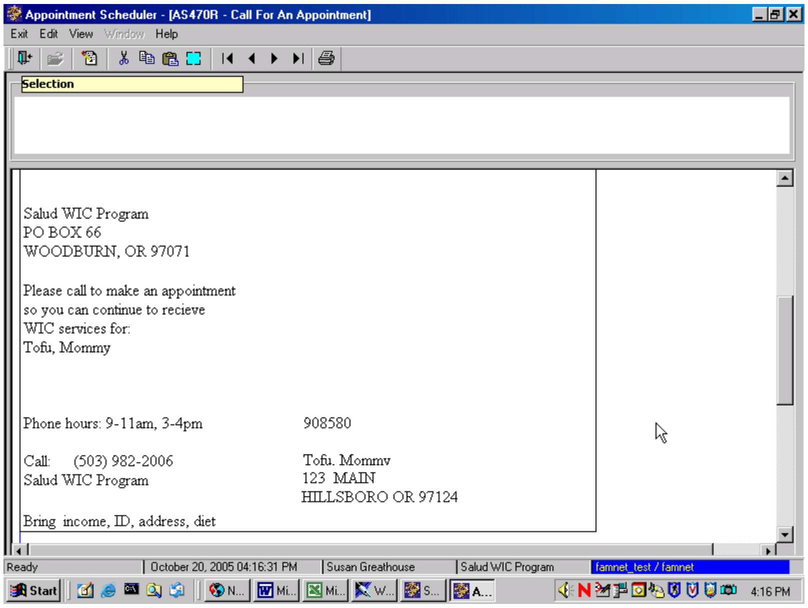

Figure 7: "Appointment Notice Postcard"

+NOTE: If there are no clients who match the criteria entered a message will be displayed stating no data was found.

5. **Click the "Print" icon to print the notices.**

6. **Select your Postcard Printer from the drop down window.**

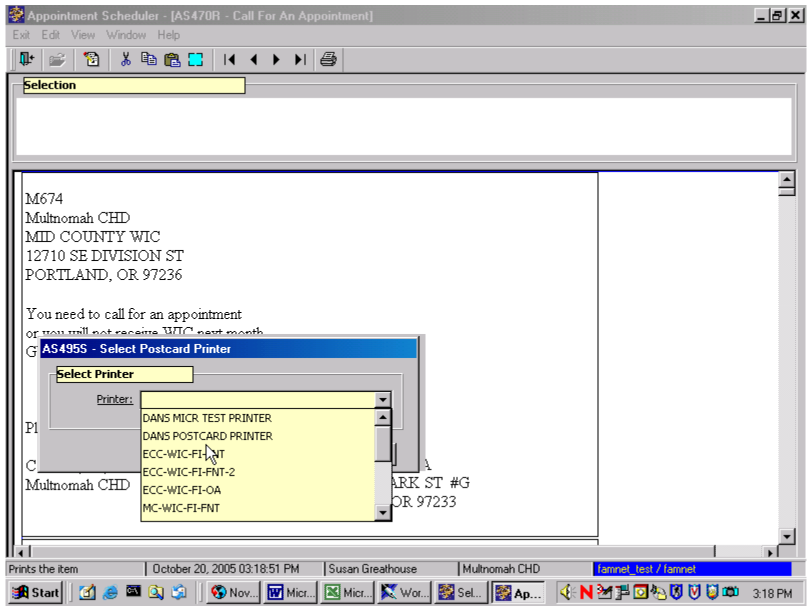

Figure 8: "Select Postcard Printer"

7. **Click "OK" to close pop-up and you will get another pop-up asking if you have loaded postcard stock. Click "OK" and appointment postcards will print.**

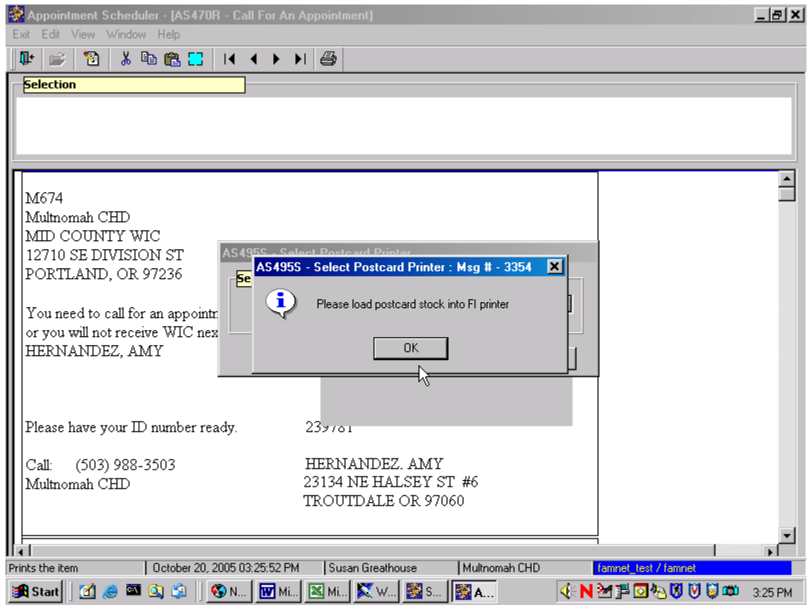

Figure 9: "Postcard Stock"

(Practice Activity #1:

The starting point for this section is:

Appointment Scheduler ÷ Outputs

1. Select "Correspondence" from the drop down list.
2. Select "Letters" and then select "Notice for Individual Appointments."
3. Select "Pick-up Food Instrument" and "Follow-up Type 2."
4. Enter the first and last day of the current month as the "From" and "To" dates.
5. Select all clinics by clicking the "Select All" button.
6. Select "Booked" as the status.
7. Click the "OK" button.
8. Use the scroll bar to view all clients displayed.
9. To help save trees – Do not print the notices.
10. Exit the window.

Y Skill Check:

Now that you have learned how to print notices, let's practice one more time. You want to send a reminder notice to all pregnant women who have a new appointment in the next ten days for all clinics in the agency. Do a screen print of the "Correspondence Print Definition" screen after you have completed it and only view the "Notice" screen. Be sure to write your name on the screen print before you turn them in to the instructor.

Printing Individual Appointment Notices

The starting point for this section is:

Appointment Scheduler ± Scheduling ± Family Appointment Record

1. **Click on the "open file" icon and retrieve a client from the Client Primary.**

2. **Click in the "select" box next to the appointment to select the individual appointment for which you want to print an appointment notice.**

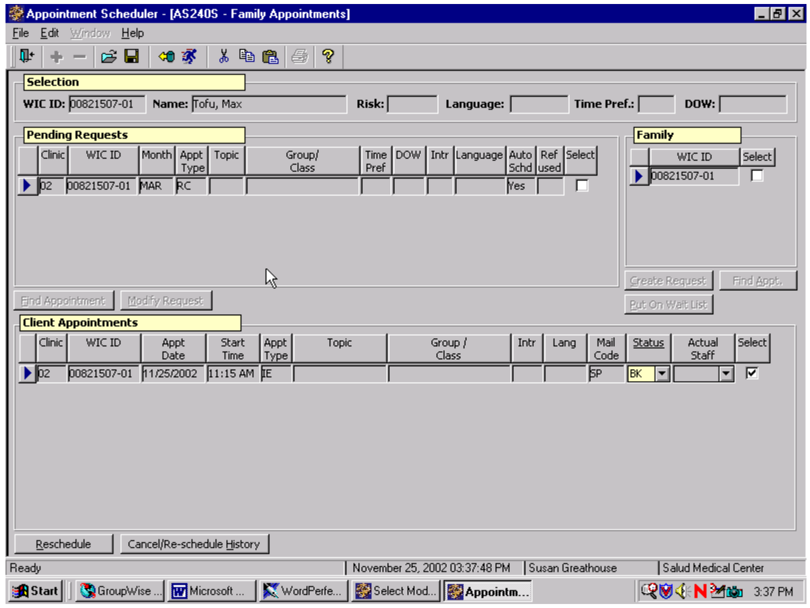

Figure 10: " Family Appointment Record"

3. **Click on the Fast Path icon and select the type of individual correspondence you want to send.**

- You can select an individual appointment, a group education or a group screening, **but you can only put one participant name per letter using this procedure.**
- You cannot print individual postcards from this function. Postcards can only be batch printed.

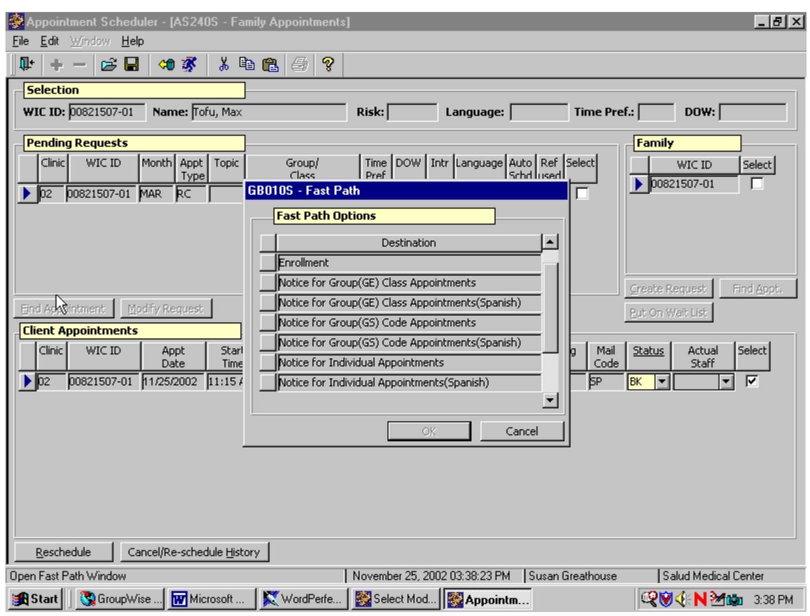

Figure 11: "Fast Path" for Appointment Notices

4. **Click on correspondence type** and the system will retrieve the information and display the selected appointment correspondence.

5. If the information is correct, press the print icon and print the notice. This will return you to the **Family Appointment Record.**

Practice Activity #2

The starting point for this section is:

Appointment Scheduler ÷ Family Appointment Record

1. Select the Client from your K Activity Sheet.
2. Select the booked appointment from the “Client Appointments” section of the screen.
3. Click on “Fast Path” icon.
4. Click on “Notice for Individual Appointment”.
5. View the appointment notice.
6. To help save trees – Do not print the notice.
7. Exit the window.

N Notes:

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Chapter 4: Appointment Scheduler
Section 8: Wait List
Lesson: Wait List

Objectives:

Upon completion of this lesson the user will be able to:
- add clients to or remove clients from a waiting list;
- accurately interpret the policies related to the different types of waiting lists;
- access and interpret the reports related to wait lists; and
- understand, use and maintain priority ineligible and appointment needed wait lists.

Oregon Policies:

♦ 475 Local Agency Operations – Waiting List

Overview:

There are times in the WIC clinic when you have a new or existing client who needs an appointment but you currently have none available, when you have exceeded your maximum caseload and cannot serve any new clients, or when certain priorities are not being served. The wait lists in TWIST allows you to track these clients, keep records on their wait list activities, and more.

The Wait Lists interfaces with the rest of the Appointment Scheduler functions, so a waiting list client can be scheduled for an appointment manually or even set up with a request so the automatic scheduler will schedule the appointment.

There are two types of wait lists in the TWIST system, Appointment needed and Priority ineligible. A client can be placed on the priority ineligible wait list if, during certification, the system determines that the category and priority the client falls under are currently frozen, or when a client applies for WIC or transfers into the clinic and the clinic is at a maximum caseload. The appointment needed wait list is for clients who need an appointment as soon as possible and are willing to come in at a moment's notice. This helps use up those appointment slots that are canceled at the last minute and allows you to better serve those who are in need of an appointment.

Instruction:

Placing Clients on the Waiting List

The starting point for this section is:

Appointment Scheduler ⇨ Scheduling ⇨ Family Appointment Records

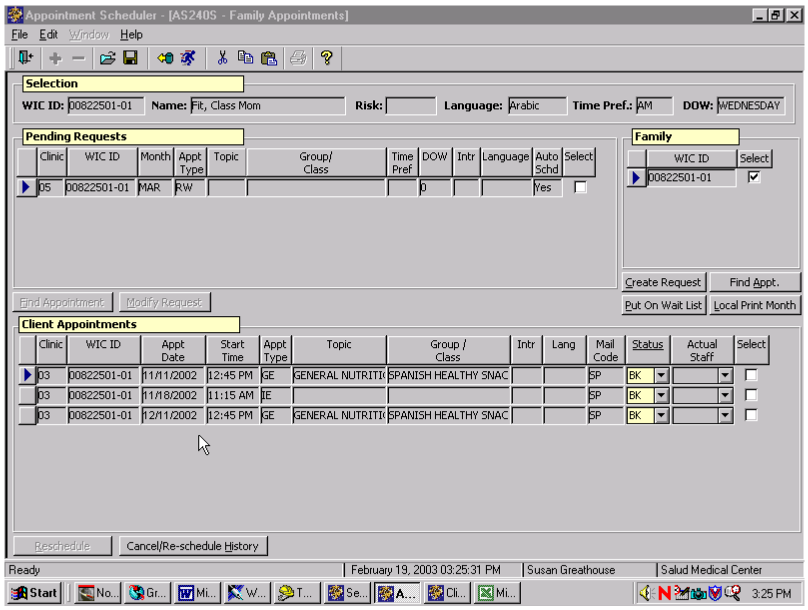

Figure 1: "Family Appointments" Screen

♫ NOTE: Please refer to Chapter 4, Lesson 400 *Family Appointment Record* for further information on this screen.

1. **Retrieve the client you want to place on the waiting list.**

2. **In the "Family" section, click the "Select" check box corresponding to the client you wish to place on a wait list.**

3. **Click the "Put on Wait List" button.**

   This brings up the "**Put on Wait List**" pop-up.

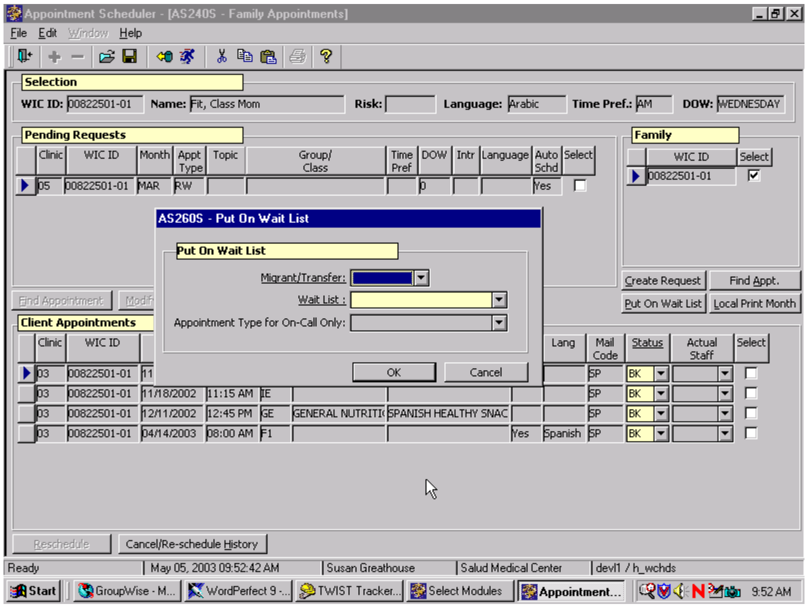

Figure 2: "Put on Wait List" Pop-Up

? NOTE: This pop-up is also accessible from the "WIC Intake" tabs in the screen in "Enrollment" and "Prescreen."

4. **Select the appropriate response in the "Migrant/Transfer" field.**

- "**Migrant**" designates the client is a migrant.
- "**Transfer**" indicates that the client is transferring into this clinic.
- "**None**" indicates that the client is neither a migrant nor a transfer.

5. **Tab to the "Wait List" field and select from the drop down list.**

5.1 "**Priority ineligible**" wait list is used:

- when the client is being certified, it is determined that the category and priority the client falls under is currently frozen; or
- when a client comes into or transfers into the clinic and the clinic is at a maximum caseload; and
- when the client has no current certification date.

5.2 "**Appointment needed**" (Appointment Needed) wait list is used for those who need an appointment but none are available.

6. **Tab to the "Appointment Type" field and select the appointment type needed.**

   This field is only activated if the "**Wait List**" field is populated with "**Appointment needed**."

7. **Click the "OK" button**

   This places the client on the wait list and closes the pop-up. Click "**Cancel**" to close the pop-up without saving any information or placing the client on a wait list.

8. **Exit.**

Removing Clients from the Waiting List

The starting point for this section is:

Appointment Scheduler ⇨ Wait List ⇨ Wait Lists

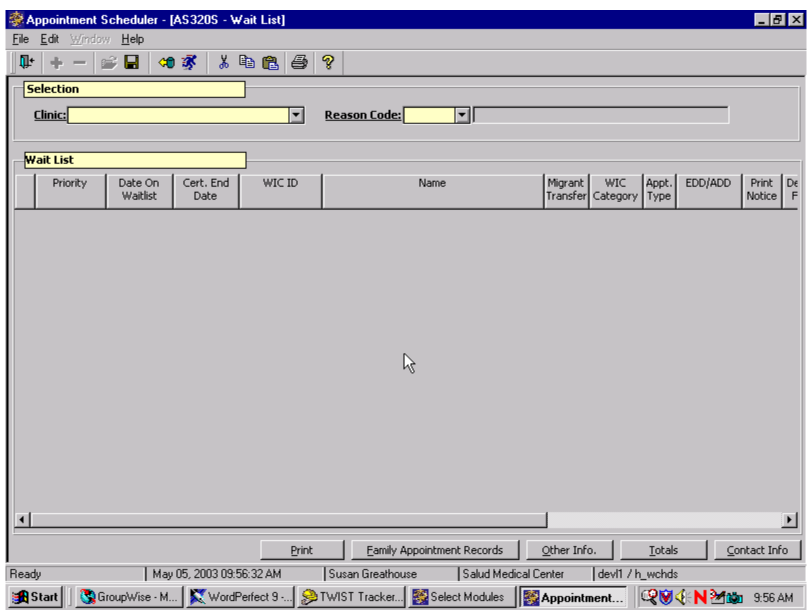

Figure 3: "Wait List" Screen

1. **Select the "Clinic" from the drop down list.**

2. **Tab to the "Reason Code" and select which wait list you wish to view from the drop down list.**

   Once the Reason Code has been selected, the system automatically displays the results, if any, in the Wait List section.

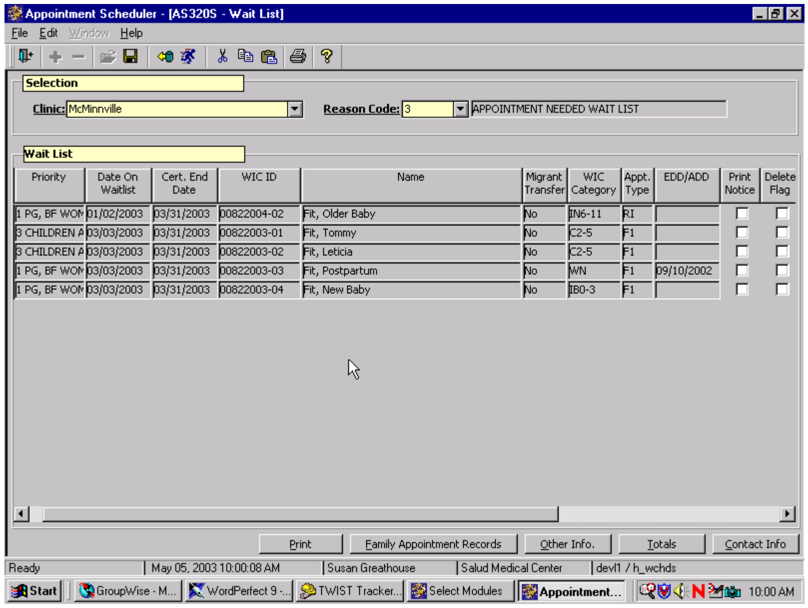

Figure 4: "Wait List" Screen with Clients

2.1 "**Priority**" displays the client's WIC priority code. Clicking on the column heading will resort the list.

2.2 The "**Date on Wait list**" field displays the date on which the client was first placed on the wait list. Clicking on the column heading will resort the list.

2.3 The "**Cert. End Date**" field displays the ending date of the client's certification period, if applicable.

2.4 "**WIC ID**" displays the client's WIC ID number.

2.5 The "**Name**" field displays the client's name.

2.6 The "**Migrant Transfer**" field displays either an "**M**" for a migrant, "**T**" for a transfer or blank for neither.

2.7 "**WIC Category**" displays the client's WIC category.

2.8 The "**Appt. Type**" field displays the appointment type needed by the client, if the client is on the Appointment needed wait list.

2.9 "**EDD/ADD**" displays the client's estimated due date or actual due date, if applicable.

2.10 The "**Print Notice**" check box is used to select clients for whom you wish to print notices.

2.11 The "**Delete Flag**" check box, when checked, removes the client from the wait list.

2.12 "**Notes**" displays any notes about this client. Double click the field to bring up the notes pop-up to add or modify notes.

2.13 Clicking on the "**Family Appointment Records**" button takes you to the "Family Appointment Record" screen to schedule an appointment or create a request for future appointments. Once an appointment has been booked, the client is removed from the wait list.

♫ NOTE: The appointment booked must match exactly the appointment type for that client indicated on the wait list for TWIST to remove the appointment from the wait list. If, for example, the Wait List shows an "RI" appointment type and the user books an "RC" appointment for that client, TWIST will not delete the "RI" appointment from the Wait List.

3. **Click the "Delete Flag" check box for the client you wish to remove from a wait list.**

   Client will be removed from the wait list once you save.

4. **Click the "Other Info" button for more information about the client.**

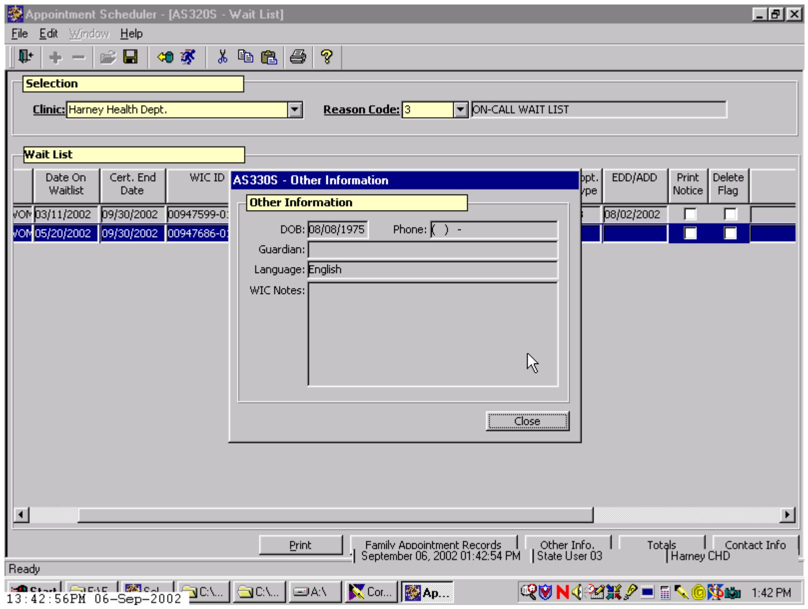

Figure 5: "Other Information" Pop-Up

4.1 The "**DOB**" field displays the client's date of birth.

4.2 The "**Phone**" field displays the client's phone information.

4.3 The "**Guardian**" field displays the client's guardian name, if applicable.

4.4 The "**Language**" field displays the spoken language of the client, as entered in the "Client Primary" screen.

4.5 "**WIC Notes**" displays any notes from the client's record.

5. **Click the "Close" button.**

Managing Waiting Lists

At times it will be helpful to see how many clients are on the wait lists. You may also want to review your success at contacting clients on the wait lists. The "Totals" button and "Contact Info" button can help you.

1. **Click the "Totals" button for information about the total number of people on the selected wait list.**

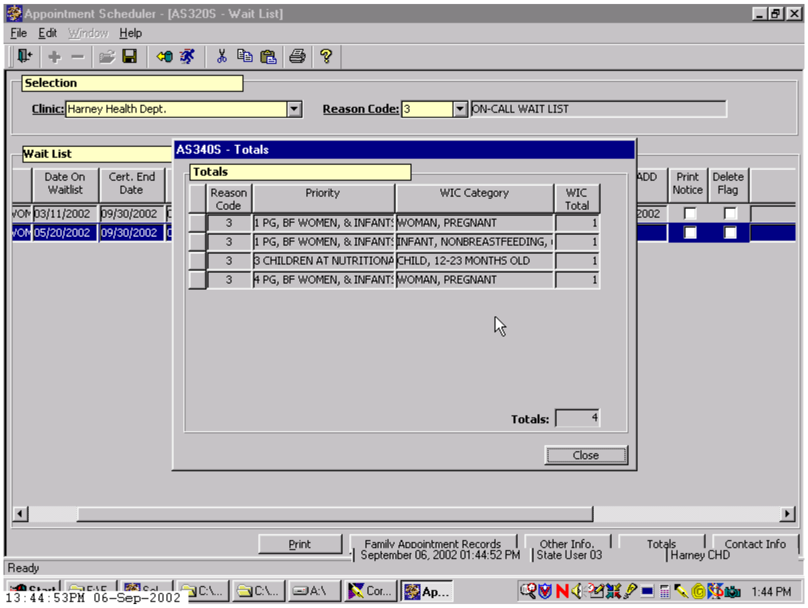

Figure 6: "Totals" Pop-Up

1.1 The "**Reason Code**" field displays the reason code of the selected wait list.

1.2 The "**Priority**" field displays how many clients in each priority are on the selected wait list.

1.3 The "**WIC Category**" field displays how many clients in each category are on the selected wait list.

1.4 The "**WIC Total**" field displays the total number of clients in the agency on the wait list broken down by priority by category.

1.5 The "**Totals**" field displays the grand total of all clients in the agency on the selected wait list.

2. **Click the "Close" button.**

3. **Click the "Contact Info" button to track attempts to contact the client and record their responses.**

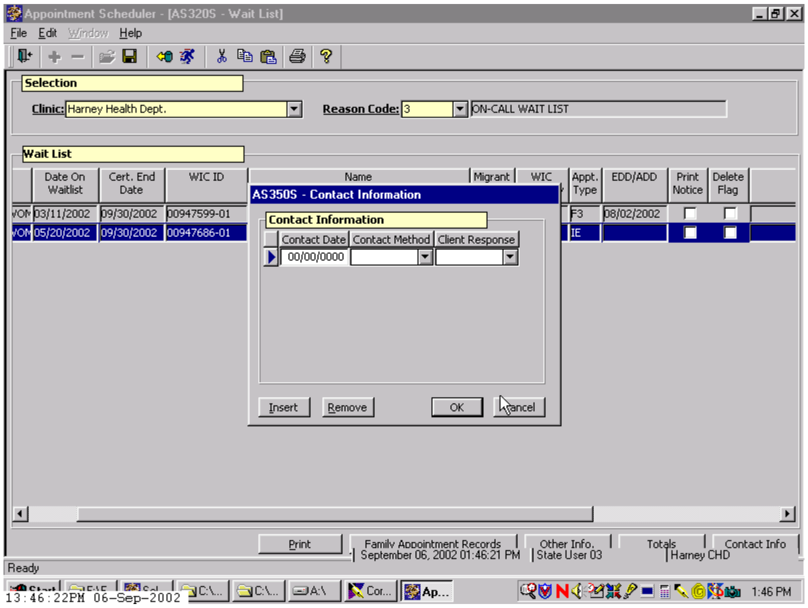

Figure 7: "Contact Information" Pop-Up

3.1 The "**Contact Date**" indicates the date contact was made with the client.

3.2 The "**Contact Method**" indicates the method used for contacting the client.

3.3 The "**Client Response**" when selected from the drop down list, indicates the client's response (positive or negative) to the contact.

3.4 Clicking the "**Insert**" button creates a new row for adding another wait list contact.

3.5 Clicking the "**Remove**" button brings up the message: "*Are you sure you wish to remove this row?*" Clicking "**Yes**" removes the row. Clicking "**No**" returns the user to the pop-up without removing the row.

3.6 Clicking the "**OK**" button saves the entered information and closes the Contact Information pop-up.

4. **Click the "Cancel" button to close the pop-up without saving any changes.**

5. **Save and exit.**

Viewing the "Appointment Needed Waiting List Client Register"

The "Appointment Needed Waiting List Client Register" is a listing of all clients on the appointment needed wait list, complete with phone numbers.

The starting point for this section is:

Appointment Scheduler ⇨ Output ⇨ Wait Lists⇨Wait List Client Register

1. **Select the "Clinic" from the drop down list or leave the field blank to run the report for all clinics within your agency.**

2. **Click the "Run" icon on the menu bar to produce the report.**

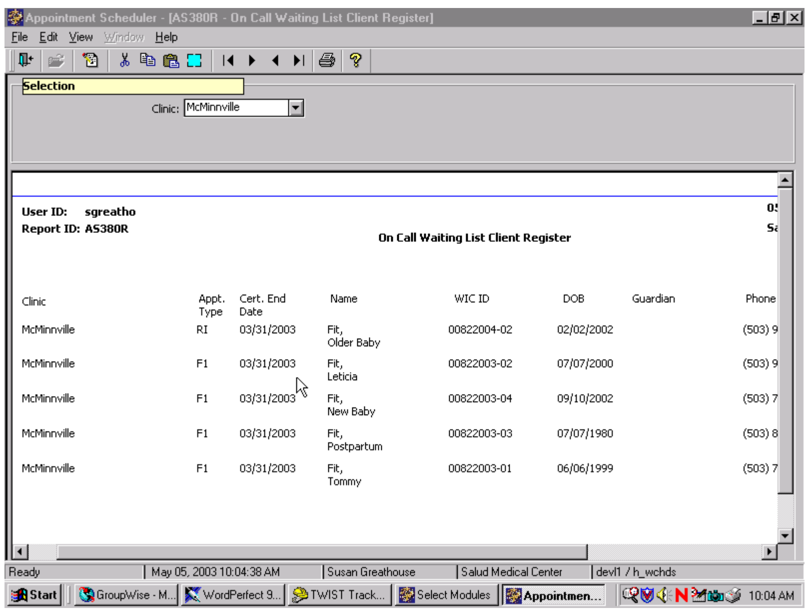

Figure 8: "Appointment Needed Waiting List Client Register"

2.1 "**Clinic**" displays the client's clinic.

2.2 "**Appt. Type**" displays the type of appointment that the client needs.

2.3 "**Cert End Date**" displays the date the client's current certification ends.

2.4 "**Name**" displays the client's name.

2.5 "**WIC ID**" displays the client's WIC ID number.

2.6 “**DOB**” displays the client’s date of birth.

2.7 “**Guardian**” displays the name of the client’s guardian, if applicable.

2.8 “**Phone**” displays the client’s phone number.

2.9 “**Phone Type**” displays the type of phone associated with the client’s phone number.

2.10 “**Date added to WL**” displays the date the client was put on the wait list.

3. **Exit.**

♫ NOTE: To print Reports, click the “**Print**” icon in the top tool bar.

Viewing the Priority Ineligible Waiting List Summary

The “Priority Ineligible Waiting List Summary” produces totals of all clients on the “Priority Ineligible” wait list with the totals broken down by clinic and WIC category.

The starting point for this section is:
Appointment Scheduler ⇨ Output ⇨ Wait Lists ⇨ Wait List Summary (Priority Ineligible).

1. **Select the “Clinic” from the drop down list or leave the field blank to run the report for all clinics within your agency.**

   The “Agency” field is protected and defaults to your agency based on your logon.

2. **Click the “Run” icon on the menu bar to produce the report.**

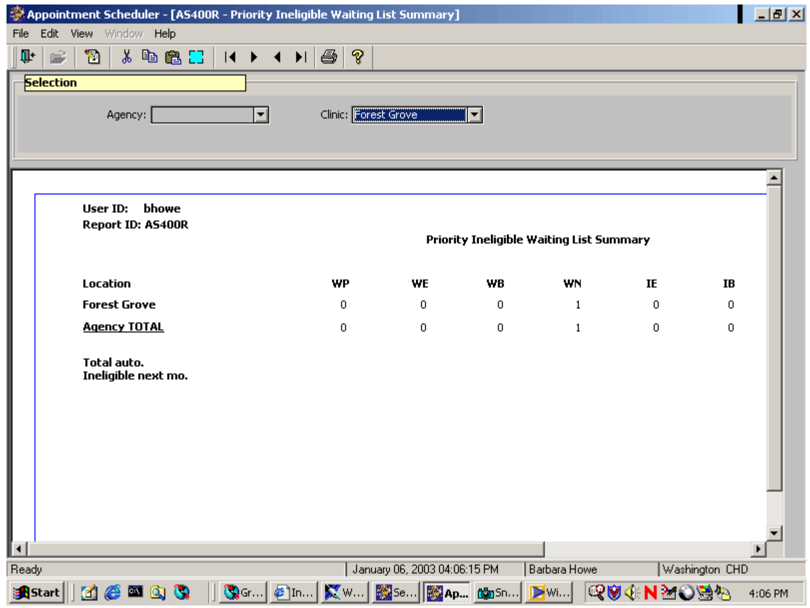

Figure 9: "Priority Ineligible Waiting List Summary"

2.1 "**Location**" displays the clinic locations.

2.2 "**WP:WE:WB:WN:IE:IB:IN:C**" displays the WIC Categories with the number of clients in each category on the wait list.

2.3 "**Total**" displays the total accumulation of all the clients in all the categories within the clinic.

2.4 "**Agency Total**" displays the totals for the entire agency.

2.5 "**Total auto ineligible next mo.**" displays the total number of clients for that agency that are due to be automatically terminated next month, broken down by category.

3. **Exit.**

♫ NOTE: To print Reports, click the "**Print**" icon in the top tool bar.

Viewing the Appointment Needed Waiting List Summary Report

The "Appointment Needed Waiting List Summary" produces totals of all clients for each clinic who are on the appointment needed wait list, with the totals broken down by appointment type needed.

The starting point for this section is:

Appointment Scheduler ⇨ Output ⇨ Wait Lists ⇨ Wait List Summary (Priority Ineligible).

1. **Select the "Clinic" from the drop down list or leave the field blank to run the report for all clinics within your agency.**

   The "**Agency**" field is protected and defaults to your agency based on your logon.

2. **Click the "Run" icon on the menu bar to produce the report.**

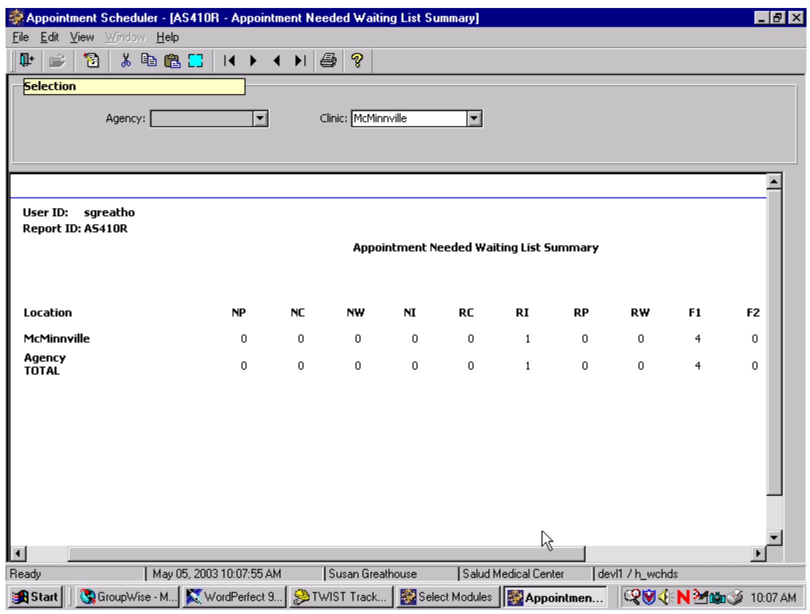

Figure 10: "Appointment Needed Waiting List Summary"

   2.1 "**Location**" displays the clinic's location.

   2.2 "**NP:NC:NW:NI:RC:RI:RP:RW:F1:F2:F3:IE**" displays the Appointment Types with the number of clients needing that specific appointment type.

   2.3 "**Total**" displays the total accumulation of all the clients in all the appointment types within the clinic.

   2.4 "**Agency Total**" displays the totals for the entire agency.

3. **Exit.**

♫ NOTE: To print Reports, click the "**Print**" icon in the top tool bar.

➥ Practice Activities:

The starting point for this activity is:
Appointment Scheduler ⇨ Scheduling ⇨ Family Appointment Records

1. Search for, retrieve, and return to the “Family Appointment Records” screen with your client.
2. Select your client in the “Family” section.
3. Click the “Put on Wait List” button.
4. Add your client to the appointment needed wait list, and select the appropriate appointment type for them.
5. Click “OK.”
6. Exit.
7. Now go to the next starting point: Appointment Scheduler ⇨ Wait List ⇨ Wait Lists.
8. Select “Clinic” from the drop down list.
9. Select “Appointment needed Wait List.”
10. Click “Contact Info” button.
11. Enter today’s date in the “Contact Date” field.
12. Select “Phone” from the “Contact Method” field drop down list.
13. Select “Positive” from the “Client Response” drop down list.
14. Click “OK.”
15. Save.
16. Exit.
17. Go to the next starting point: Appointment Scheduler ⇨ Output ⇨ Wait Lists ⇨Wait List Client Register.
18. Select your clinic from the drop down list.
19. Run the report.
20. Exit.

✓ Skill Check:

Now, it’s your turn to show what you have learned about wait lists. Use your ☛ Activity Sheet for this practice.

The first client is a four-year-old child who comes into your clinic. Your agency is not currently serving four year olds, but the child’s mother wants you to put the child on the wait list anyhow. Place the client on the appropriate wait list. Later that week, your agency is given additional caseload from the state WIC office so now you may serve all priorities. Run the report that would be needed to view how many clients are currently waiting to be enrolled. Make a screen print. Write your name on it and turn it in to the instructor.

✍ **Notes:**

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Chapter 4: Appointment Scheduler
Section 9: ANSWR Basics
Lesson: ANSWR Extract Settings

Objectives:

Upon completion of this lesson, users will be able to:

- locate the ANSWR Extract Settings screen in TWIST; and
- determine the selection criteria for ANSWR appointment data extracts.

Oregon Policies:

♦ 606 TWIST Minimum Scheduler Usage

Overview:

The Automated Notification System for WIC Reminders (ANSWR) is an automated voice message system used to send appointment reminder messages to WIC participants. Managed by a company called US Netcom, ANSWR includes voice, text, and email messages in English, Spanish, Russian, Vietnamese, Cantonese, Somali, Burmese, and Arabic.

ANSWR uses statewide appointment data automatically generated from TWIST End of Day processing. The ANSWR statewide appointment data extracts will be run in the evening, according to the following schedule:

Extract from End of Day:	Messages Sent:	For Future Appts. On:	For Missed Appts. On:
Sunday	Monday	Wednesday	Thursday, Friday and Saturday
Monday	Tuesday	Thursday	N/A
Tuesday	Wednesday	Friday	Monday
Wednesday	Thursday	Saturday and Monday	Tuesday
Thursday	Friday	Tuesday	Wednesday

Instruction:

TWIST Fields Used In The ANSWR Statewide Data File

There are several fields in TWIST that generate data for the messages sent to WIC participants. Therefore, it is essential that WIC program staff take special care and attention when updating or modifying these TWIST fields. Following is a list of all TWIST data exported to the statewide ANSWR data file.

- "**Telephone**" field from Client Master Demographics: the data file will be populated with one phone number, and will populate according to the following order: home, cell, cell2, message, depending on what is in the participant record.
- "**Spoken Language**" field from Client Master Demographics: English (ENGL), Spanish (SPN), Russian (RUS), Vietnamese (VIET), Cantonese (CANT), Somali (SOM), Burmese (BURM), and Arabic (ARAB). All other languages will default to English.
- "**WIC ID#**" – temporary IDs included.
- "**May we contact you by phone?**" field from the Client Master Primary screen. ANSWR will call the participant only if the answer is set to "Yes." ANSWR will <u>not</u> call if this is set to "No."
- "**Client/Family Appointment Date and Time**" from Appointment Scheduler.
- "**Clinic**"– clinic field from Appointment Scheduler, not from Enrollment.
- "**Appointment Status**" field from Appointment Scheduler: the statewide data extract will include "Booked" appointments for future reminders and "No Show" appointments for missed appointments.

Using the ANSWR Extract Settings Screen for Agency ANSWR Settings

The starting point for this lesson is:

Appointment Scheduler ⇨ Scheduling ⇨ ANSWR Extract Settings

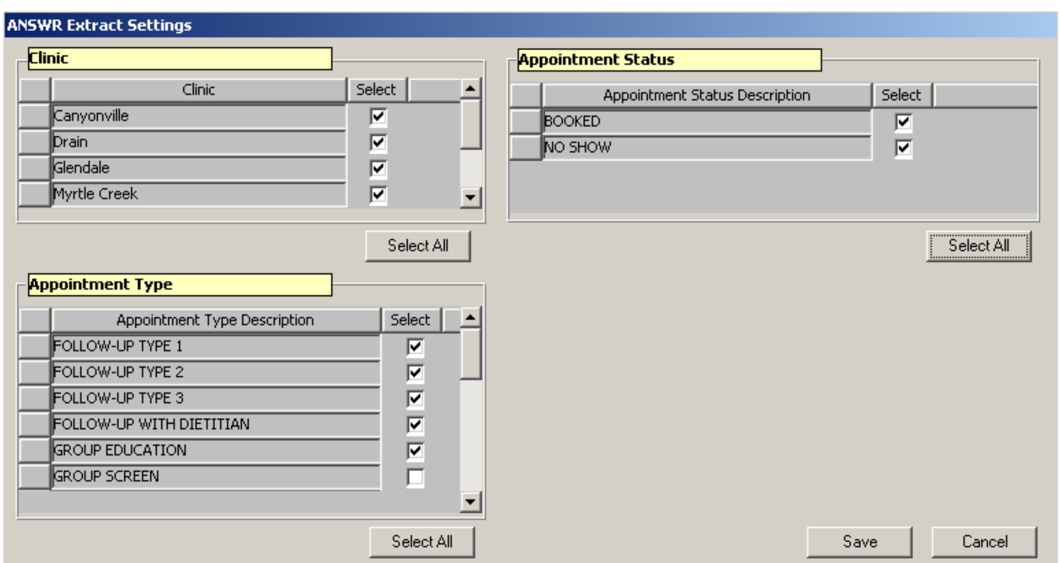

Figure 1: "ANSWR Extract Settings" Screen

♫ NOTE: The ANSWR Extract Settings screen functions by agency. <u>Any changes made to this screen will affect all clinics in your agency.</u> When you enter this screen, the settings displayed will be the settings that were last saved by a user at your agency.

1. ANSWR will be used for two types of voice, text, and email messages:
   - Reminder messages for Booked (future) appointments; and
   - Follow-up messages for No Show (missed) appointments.

2. The "Appointment Status" selection criteria allow the user to select which appointment statuses to include in the ANSWR data file for your agency. You may choose to include data for "Booked" appointments or "No Show" appointments by checking the selection box or clicking the "Select All" button to extract data for both types.

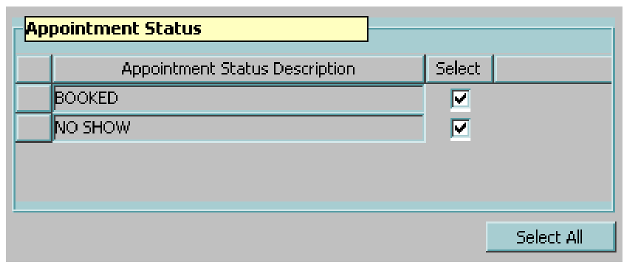

Figure 2: "Appointment Status" Selection Criteria

3. The "Appointment Type" selection criteria allow the user to select which appointment types to include in the ANSWR data file for your agency. For example, you may elect to have ANSWR make appointment reminder calls for specific appointment types by checking the selection box or click the "Select All" button to include data for all appointment types.

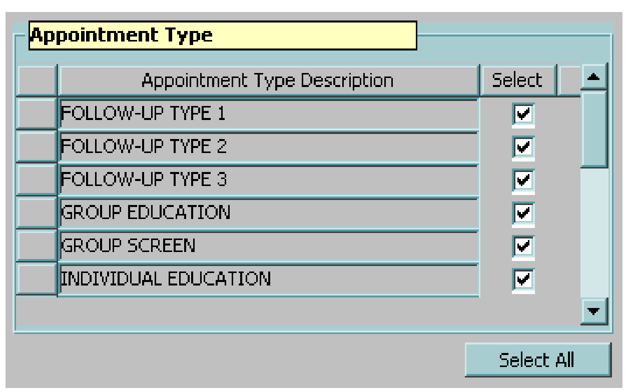

Figure 3: "Appointment Type" Selection Criteria

4. The "Clinic" selection criteria allow the user to select which clinic(s) to include in the ANSWR data file for your agency. You can select

which clinics you wish ANSWR to make reminder calls for by clicking the selection box or click the "Select All" button to include appointment data for all clinics.

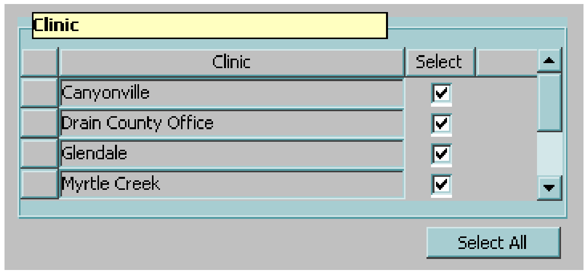

Figure 4: "Clinic" Selection Criteria

♫ NOTE: The default for the selection criteria is "All." However, once a user changes the selection criteria for your agency, that change will stay in effect until a user changes the criteria selected.

♫ NOTE: Because ANSWR uses state level data files, if your agency adds a new clinic or changes a clinic name you will need to let the State WIC office know so they can work with US Netcom to make a voice recording and the necessary data file adjustments. Please call App Support with your new or updated clinic information.

5. Click on the "Save" button at the bottom of screen to save the desired settings.

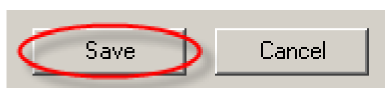

Figure 5: "Save" Button

6. Multiple Family Member Appointments. If more than one family member has an appointment on the same day, the ANSWR extract file will combine those appointments into one record and use the earliest appointment time in the reminder message(s). For example, a mother and baby each have an appointment in the same clinic on the same day. Only one reminder message per type (e.g. only one voice call, text message, and/or email) will be sent to that family, and the time listed in the reminder message(s) will be the earliest appointment time.

♫ NOTE: One exception to this is if ANSWR Extract Settings Appointment Type selection criteria section does not include certain appointment types. For example, a woman has an NP appointment scheduled and her child has an RC appointment type scheduled in the same clinic on the same day. If the ANSWR Extract Settings Appointment Type selection criteria section does not include the RC appointment type, only the woman's data will appear in the ANSWR extract file. This could also potentially cause a problem with clinic flow if the woman's appointment time was later than her child's appointment time.

✍ **Notes:**

Chapter 4: Appointment Scheduler
Section 9: ANSWR Basics
Lesson 901: ANSWR Daily Reports

Objectives:

Upon completion of this lesson, users will be able to:

- retrieve and interpret ANSWR daily reports.

Oregon Policies:

- ♦ 606 TWIST Minimum Scheduler Usage

Overview:

The Automated Notification System for WIC Reminders (ANSWR) is an automated voice message system used to send appointment reminder messages to WIC participants. Managed by a company called OneCallNow, ANSWR includes voice, text, and email messages in English, Spanish, Russian, Vietnamese, Cantonese, Somali and Arabic.

OneCallNow has developed a website for WIC staff to access daily reports for all appointment reminders and missed appointment notices.

Instruction:

Retrieving the ANSWR Daily Reports

1. Go to the following web address to access the ANSWR report login screen: https://secure.onecallnow.com/Login/Login.aspx?Svc=1

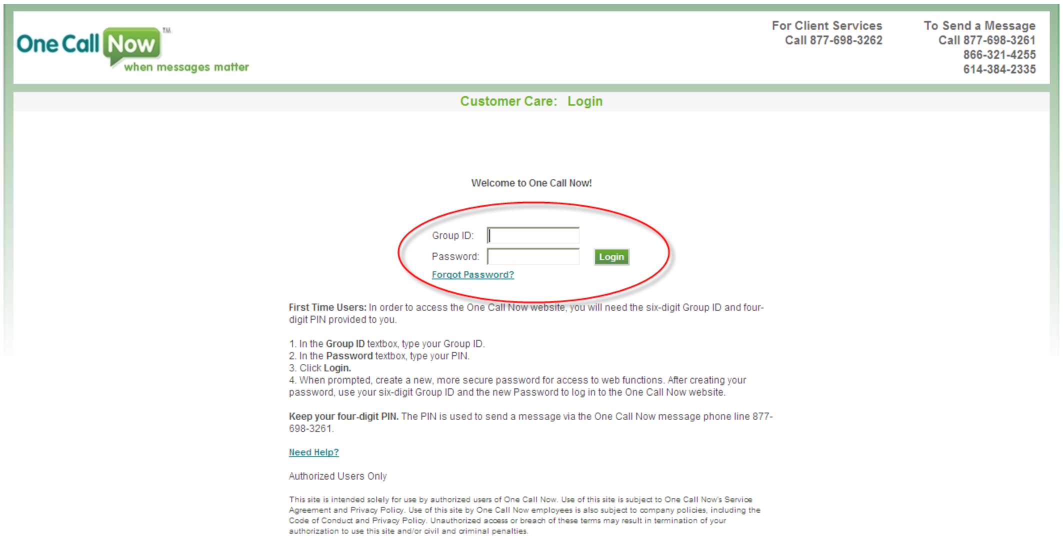

Figure 1: ANSWR Report Login Screen

2. Enter the **"Group ID"** for the clinic results you would like to view. This will be a 6 digit number provided by the State WIC office.

3. Enter the **"Password"** for the clinic results you would like to view. This will be a 4 digit number provided by the State WIC office.

4. Click the **"Login"** button.

5. This will take you to the clinic's **"Account Status & News"** page, with summary information and links to detailed reports.

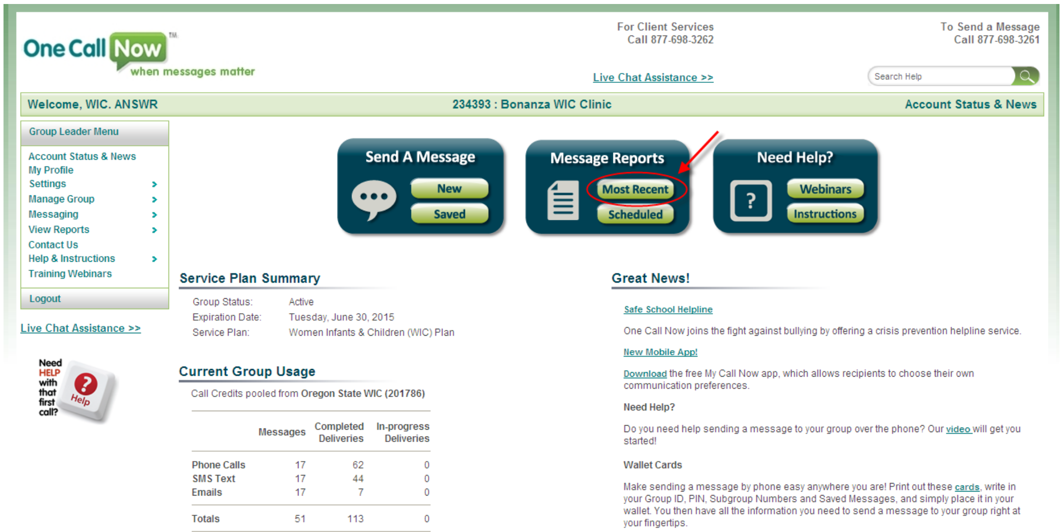

Figure 2: Clinic Account Status & News Page

6. Click on **"Most Recent"** in the **"Message Reports"** box at the top of the page.

7. The **"Message Reports"** page will show you a summary of the clinic's ANSWR messages sent over the last week, organized by date. From this screen you can select a different date range to view (e.g., Today, Yesterday, Last 30 days, last 60 days, or a specific Date Range using the Start Data and End Date fields).

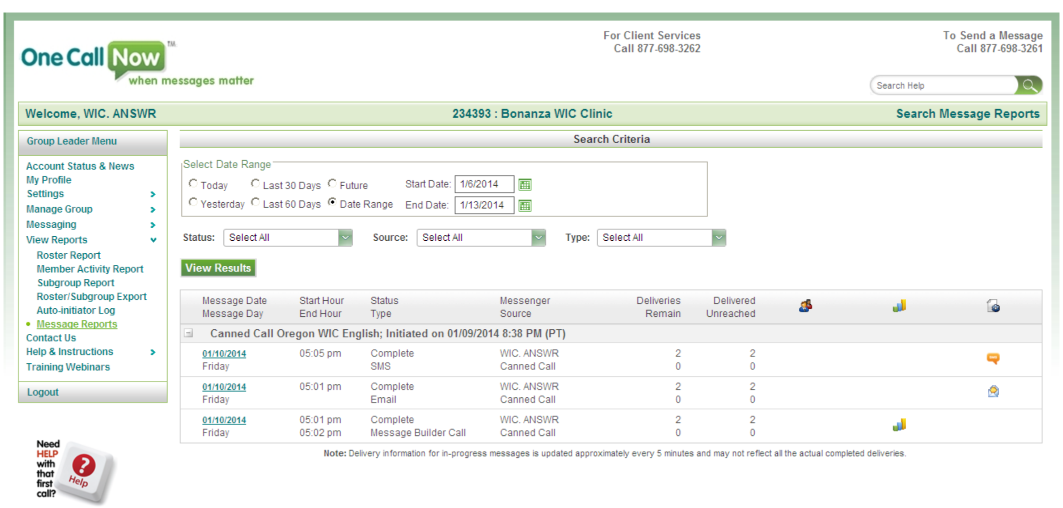

Figure 3: Message Reports Page

8. Click on the blue hyperlinked dates to view the detailed results for each day and type of message – text ("SMS"), email, and voice calls ("Message Builder Call").

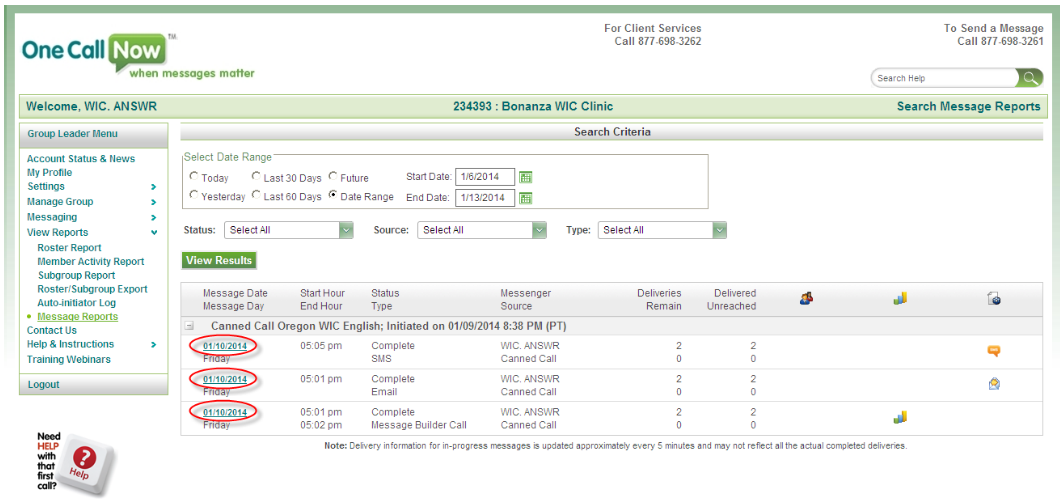

Figure 4: Daily Report Hyperlinks

a. The detailed results for text messages ("SMS") will display the participant name and phone number and the status, initiated date/time, and delivery date/time for each of the messages. The common text message "Status" results are:

- **"Reached SMS"** – the text was successfully delivered.
- **"Unreachable Temporary"** – a delivery confirmation from the cell phone carrier has not yet been received.
- **"Unreachable Bad Destination"** – the text was not received due to a bad number or a number that cannot receive text messages.

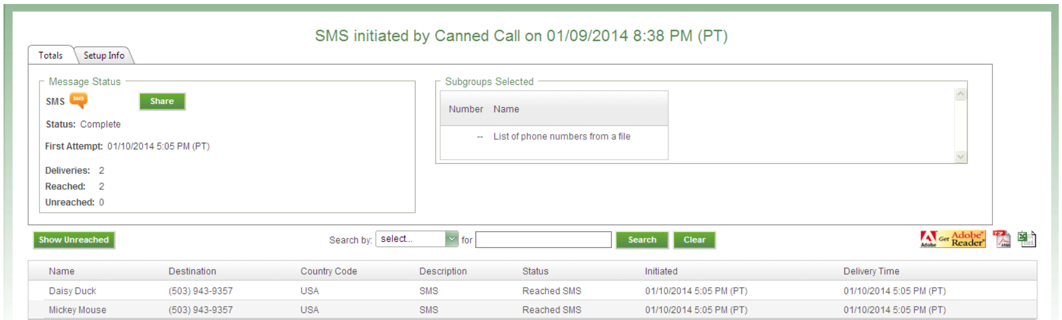

Figure 5: Text Message Detailed Results

b. The detailed results for email messages will display the participant name and email address and the status, initiation date/time, and delivery date/time for each of the messages. The common email message "Status" results are:

- **"Reached email"** – the email was successfully delivered.
- **"Unreachable bad destination"** – the email was not successfully delivered (i.e. a "bounce-back" email was received).

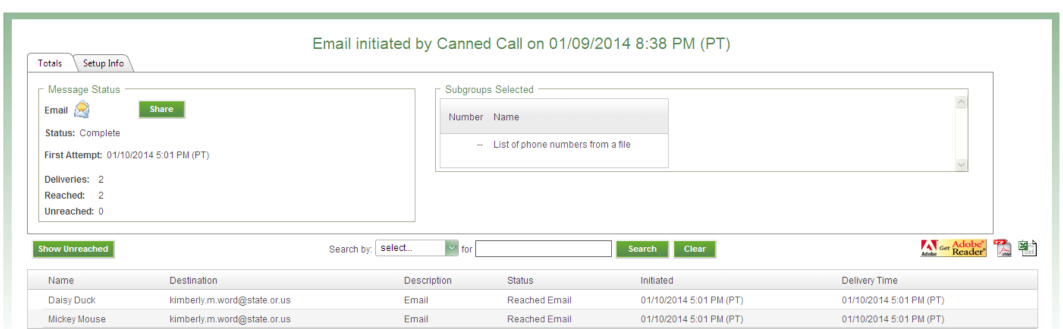

Figure 6: Email Message Detailed Results

c. The detailed results for the voice messages ("Message Builder Call") will display the participant name and phone number and the call status, first call attempt date/time, call delivery date/time, the duration of the call, and the number of call attempts for each of the messages.

- The common voice call "Status" field results are:
    1. **"Reached by Text"** – a text message was successfully sent to this number and therefore a voice call was not attempted. The voice message audio file will still be available for this participant.
    2. **"Reached Person"** – the call was answered by a person.
    3. **"Reached Machine"** – the call was answered by an answering machine or voicemail system.
    4. **"Unreached Expired"** – the call was not answered after the maximum of 5 attempts had been reached.
    5. **"Unreached Disconnected"** – the phone number has been disconnected.
- If a participant selected "1" to confirm their appointment or "2" to reschedule during their reminder call, a "Response" column will display with the following results:
    1. **"1 : Confirm"**
    2. **"2 : Reschedule"**

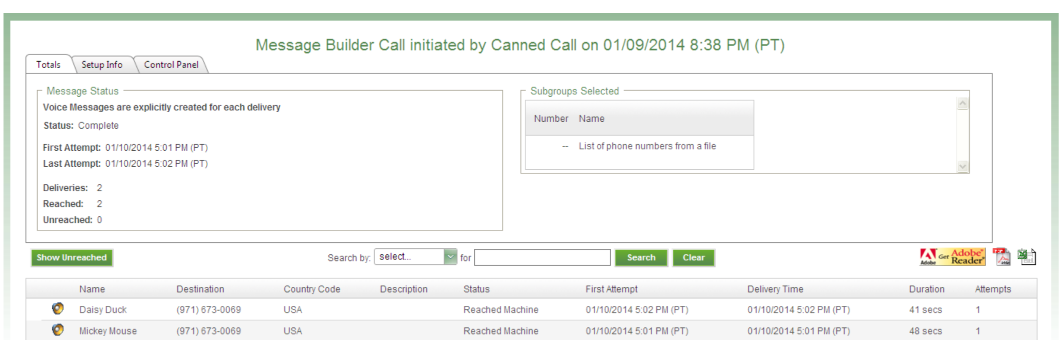

Figure 7: Voice Call Message Detailed Results

♫ NOTE: Below are some tips for finding instances where participants select “1” or “2” during their ANSWR voice reminder calls:

- Only the daily reports with the bar chart icon next to them will have any “1” or “2” responses. For example, in the screen shot below, only the first and third set of ANSWR voice calls have instances where one or more participants selected “1” or “2.”

Canned Call Oregon WIC English; Initiated on 03/04/2014 8:35 PM (PT)					
03/05/2014 Wednesday	05:05 pm	Complete SMS	WIC. ANSWR Canned Call	4 0	2 0
03/05/2014 Wednesday	05:00 pm	Complete Email	WIC. ANSWR Canned Call	0 0	0 0
03/05/2014 Wednesday	05:01 pm 08:14 pm	Complete Message Builder Call	WIC. ANSWR Canned Call	10 0	8 2
Canned Call Oregon WIC Spanish Missed; Initiated on 03/04/2014 8:35 PM (PT)					
03/05/2014 Wednesday	05:05 pm	Complete SMS	WIC. ANSWR Canned Call	1 0	1 0
03/05/2014 Wednesday	05:00 pm	Complete Email	WIC. ANSWR Canned Call	0 0	0 0
03/05/2014 Wednesday	04:02 pm 04:02 pm	Complete Message Builder Call	WIC. ANSWR Canned Call	1 0	1 0
Canned Call Oregon WIC English Missed; Initiated on 03/04/2014 8:35 PM (PT)					
03/05/2014 Wednesday	05:05 pm	Complete SMS	WIC. ANSWR Canned Call	5 0	3 0
03/05/2014 Wednesday	05:00 pm	Complete Email	WIC. ANSWR Canned Call	0 0	0 0
03/05/2014 Wednesday	05:00 pm 08:10 pm	Complete Message Builder Call	WIC. ANSWR Canned Call	9 0	7 2
Canned Call Oregon WIC English; Initiated on 03/03/2014 8:33 PM (PT)					
03/04/2014 Tuesday	05:06 pm	Complete SMS	WIC. ANSWR Canned Call	55 0	45 0
03/04/2014 Tuesday	05:00 pm	Complete Email	WIC. ANSWR Canned Call	2 0	1 1
03/04/2014 Tuesday	05:01 pm 08:12 pm	Complete Message Builder Call	WIC. ANSWR Canned Call	83 0	82 1

Figure 8: Voice Call Message Daily Reports with Response Results

- Once you have selected a report to view (by clicking on the blue underlined date), use the Excel icon in the upper right corner to open the report results in Excel. Sort the whole file by the "Response" column to see the information on those who pressed “1” or “2” grouped together at the beginning of the spreadsheet.

9. On the voice call detail screen, click on the speaker icon in the far left column on an individual participant’s record to hear an audio file of the exact message that was delivered to that participant. While this is specifically for the voice calls, the same appointment data is used for the text and email messages, so this can be helpful for troubleshooting participant questions about their ANSWR messages (since the equivalent information is not available for the text and email messages).

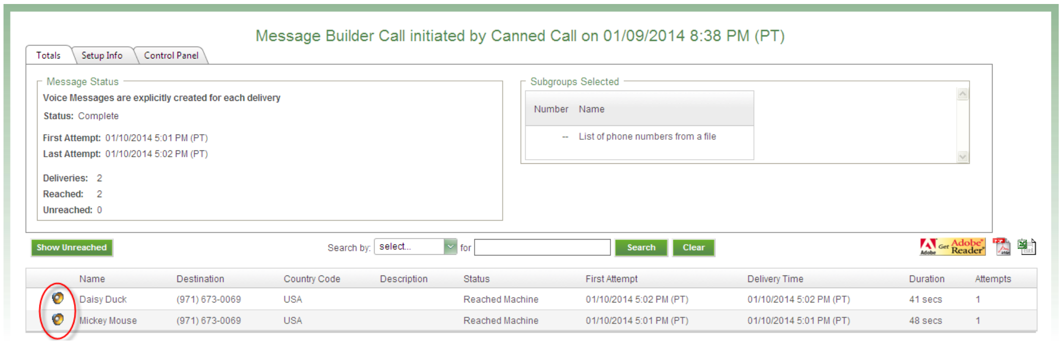

Figure 9: Voice Call Message Audio Files

10. To save the detailed report data as a PDF file or Excel spreadsheet, click on the Adobe PDF or Microsoft Excel icons above the far right column of the list.

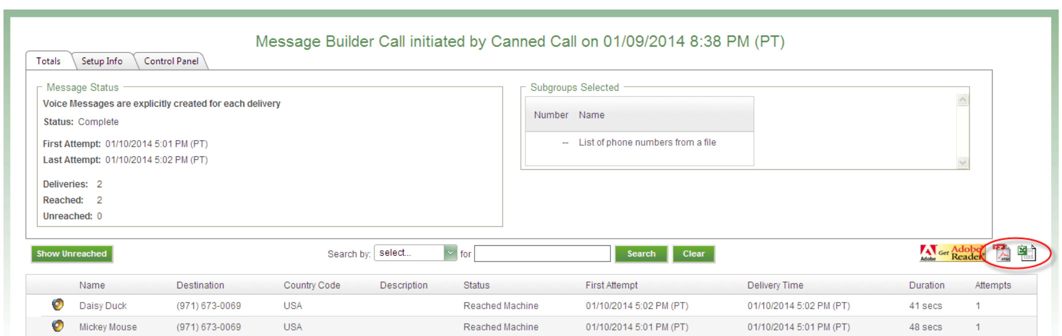

Figure 10: Adobe PDF and Microsoft Excel Icons

a. The Adobe PDF version of the report will look like this.

Message Builder Call initiated by Canned Call on 01/09/2014 8:38 PM (PT) (All Deliveries)

Name	Destination	Description	Status	First Attempt	Delivery Time	Duration	Attempts
Daisy Duck	(971) 673-0069		Reached Machine	01/10/2014 5:02 PM (PT)	01/10/2014 5:02 PM (PT)	41 secs	1
Mickey Mouse	(971) 673-0069		Reached Machine	01/10/2014 5:01 PM (PT)	01/10/2014 5:01 PM (PT)	48 secs	1

Deliveries	2
Reached	2
Unreached	0

Figure 11: Adobe PDF Version of the Detailed Report

b. The Microsoft Excel spreadsheet version of the report will look like this, and can be sorted, organized, etc. like a regular Excel spreadsheet.

	A	B	C	D	E	F	G	H	I	J
1	Name	External ID	Destination	Country Code	Description	Status	First Attempt	Delivery Time	Duration	Attempts
2	Daisy Duck		(971) 673-0069	USA		Reached Machine	01/10/2014 5:02 PM (PT)	01/10/2014 5:02 PM (PT)	41 secs	1
3	Mickey Mouse		(971) 673-0069	USA		Reached Machine	01/10/2014 5:01 PM (PT)	01/10/2014 5:01 PM (PT)	48 secs	1

Figure 12: Microsoft Excel Version of the Report

Additional Features of the ANSWR Daily Reports

1. Search by selected date ranges by clicking on **"View Reports"** and then **"Message Reports"** on the left hand side of the screen.

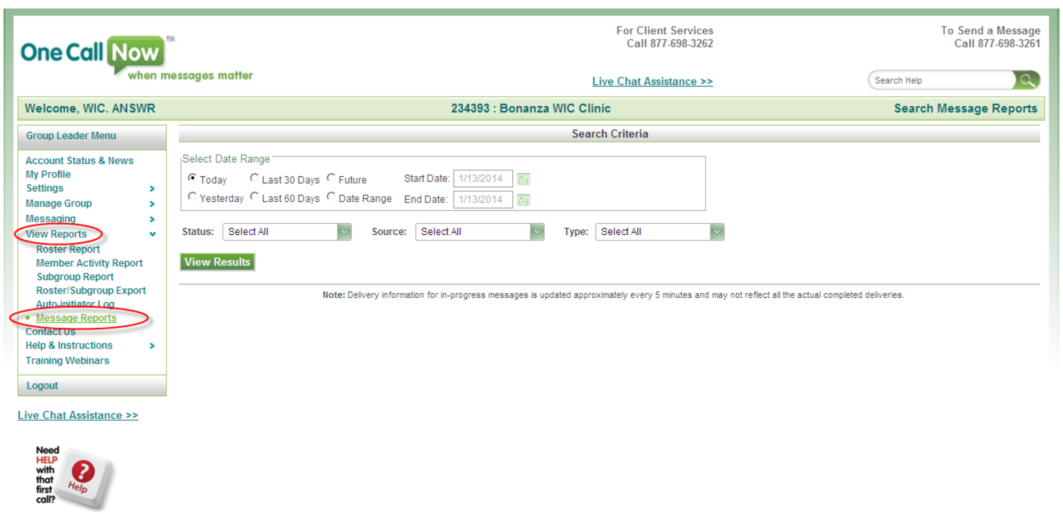

Figure 13: Search Message Reports Screen

2. Search for a specific WIC participant's record by selecting **"View Reports"** and **"Member Activity Report"** on the left hand side of the screen. You can search by participant phone number or email address.

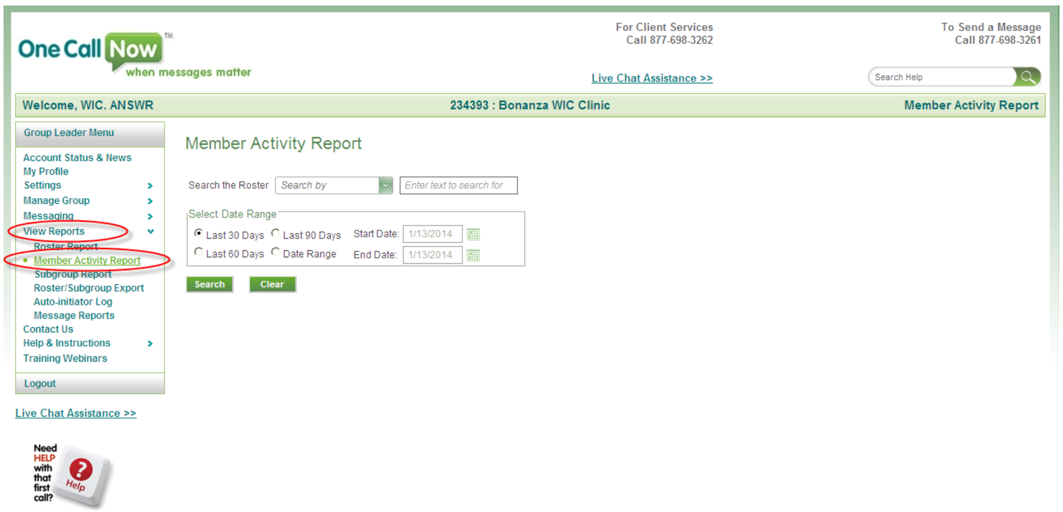

Figure 14: Member Activity Search Screen

3. Search for a specific WIC participant's record using phone number by selecting **"Phone"** from the drop-down next to **"Search the Roster."** The phone number can be entered in any format, e.g. 9716730069, 971-673-0069, or (971) 673-0069. Select a date range and click on **"Search"**:

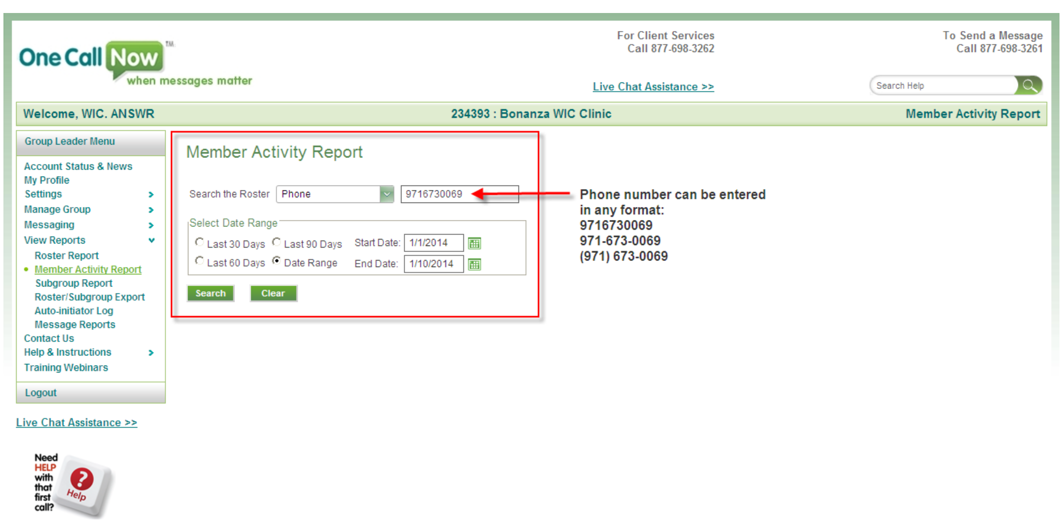

Figure 15: Member Activity Phone Number Search

4. The search results by phone number will be displayed under **"Destination Activity."**

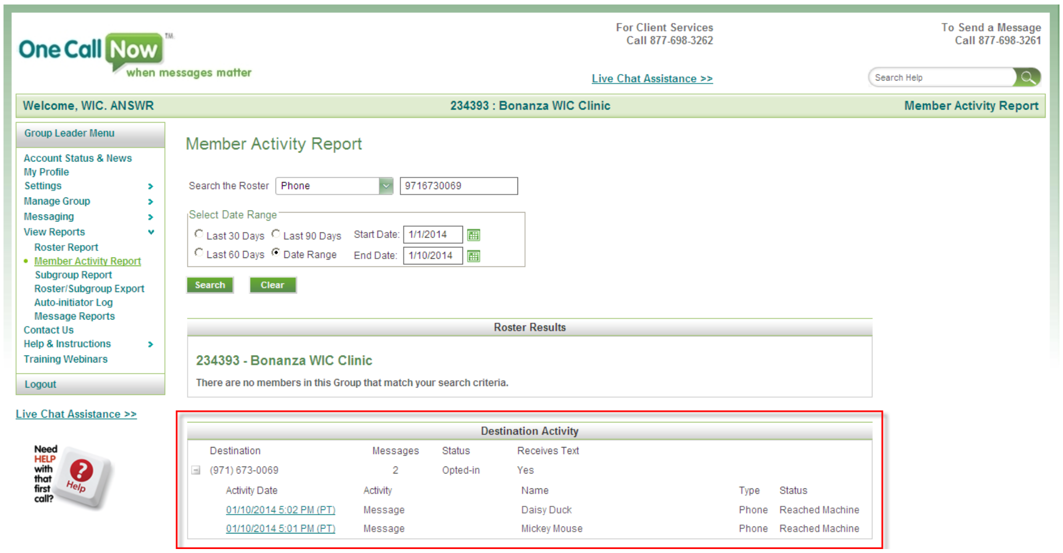

Figure 16: Member Activity Phone Number Search Results

5. Search for a specific WIC participant's record using email address by selecting **"Email Address"** from the drop-down next to **"Search the Roster."** The email address must conform to the standard email format, e.g., name@email.com. Select a date range and click on **"Search."**

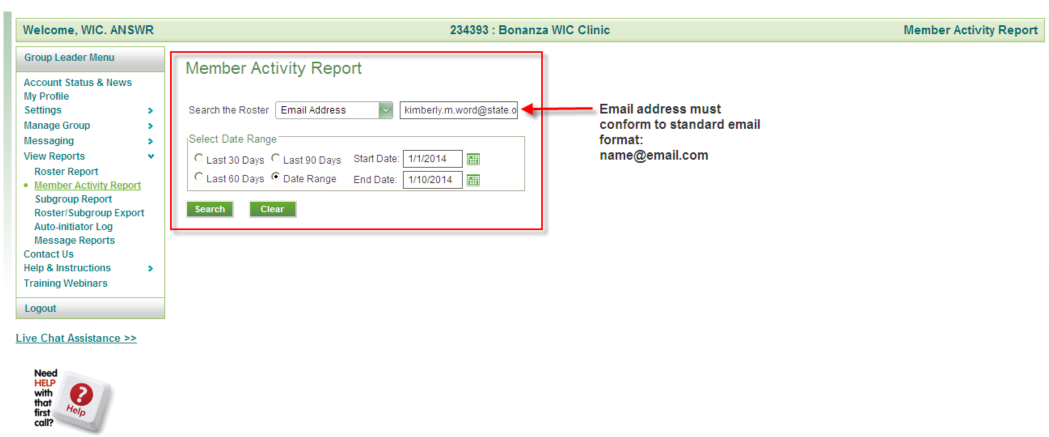

Figure 17: Member Activity Email Search

6. The search results by email address will be displayed under **"Destination Activity."**

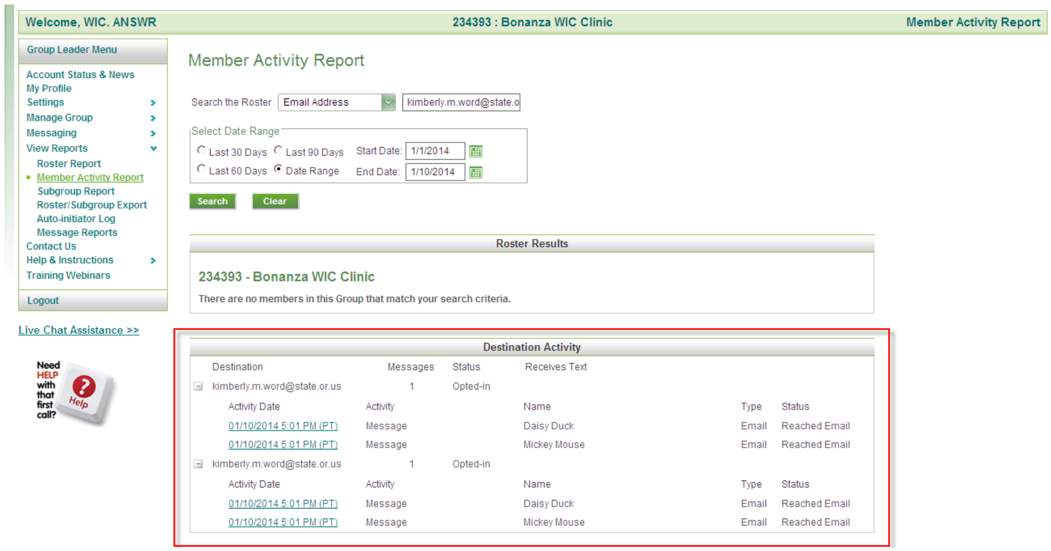

Figure 18: Member Activity Email Search Results

7. If you have any questions about ANSWR or your ANSWR Reports, please contact App Support for assistance.

✍ Notes:

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Chapter 6: System Administration
Section 1: User Maintenance
Lesson: Special User - Maintain User IDs & Passwords

Objectives:

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

- assign and maintain security roles for each user;
- reset or change passwords assigned to their users;
- format User IDs to an identified standard; and
- assign staff a security role.

Overview:

Maintaining the security and confidentiality of the client information stored in TWIST is critical. One way to do this is by assigning unique User IDs and passwords with appropriate security roles to each staff person in WIC. This is the section of TWIST where you will assign specific roles for each staff member. The roles assigned to each staff member will have specific accesses associated with them within the TWIST system. Since you are logged in as the Local Agency currently, the only available roles you will see and/or assign, will be those available to the local agencies.

Within the "**User**" window, you can create a new user, remove a user and edit the information of an existing user, including the password. The User ID is the "name" you will use to log on to TWIST. Your local system administrator, who will receive their User ID and password from the state WIC office, normally assigns your User ID. The system administrator will assign your initial password. You can then change your password to a unique word or combination of letters and numbers known only you and the system administrator.

The "Roles" are a set of functions routinely performed by a group of specific users. TWIST allows the system administrator to assign appropriate security roles based on staff functions in the local agency. Some examples of roles are one that allows "view only" access and another that allows that person to edit and update local agency base tables. You can assign a user to one or more roles and/or remove a user from his roles

Let's start assigning roles!

Instruction:

Accessing the "Security" Screen

From the "Select Modules" screen, click on the "Security" tab, and then click on "Security Control" icon.

Only the WIC Coordinator and the designated System Administrator will have access to this area in Family Net.

From the "Maintain" menu select "User."

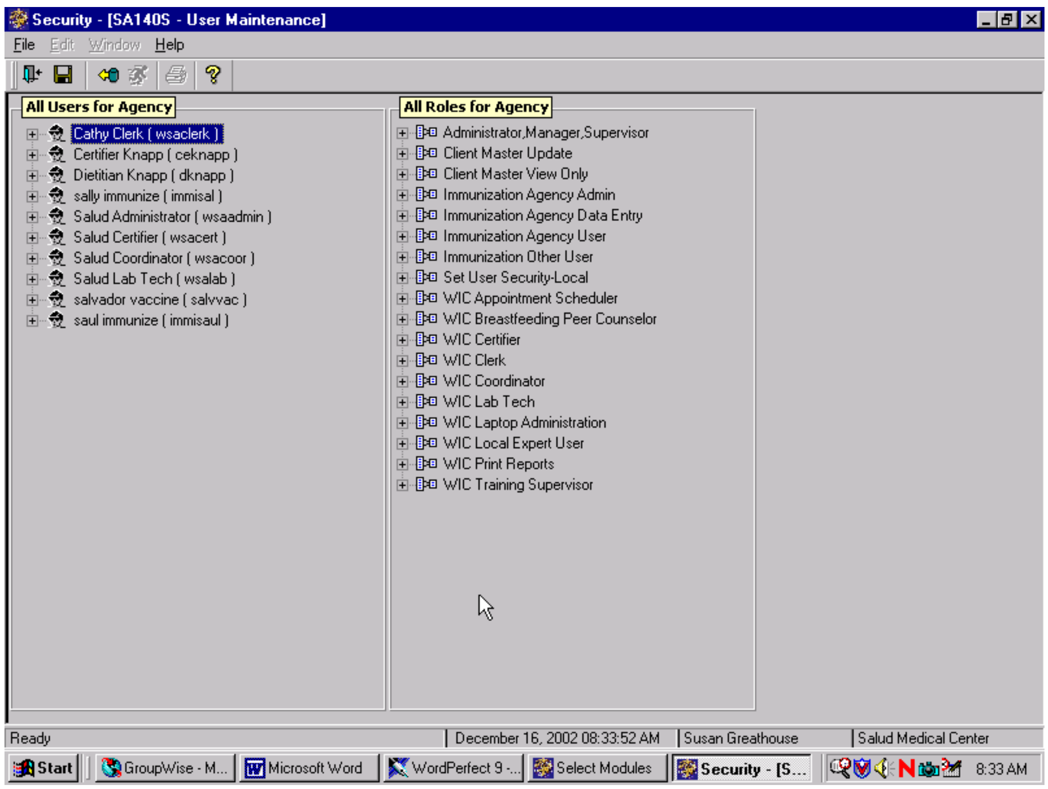

Figure 1: "Security - User Maintenance" Screen

1.1 This will open a two-column window. One side will display all the "**Users**" for this particular agency, listed by both their assigned name and their User ID.

1.2 The other side is a list of all the available "**Roles**." These are more fully explained in the *Local Agency Security Roles* document in the Appendix. These are state defined and maintained.

Adding a User

1. **To add a "User," position the cursor anywhere on the user side of the screen. Right click (with your mouse) to display a choice of four actions:**

   - Insert User
   - Remove User
   - Edit User
   - Edit User Roles

2. **Select "Insert User."**

   This will activate a new pop-up window and allow you to enter the new user's information.

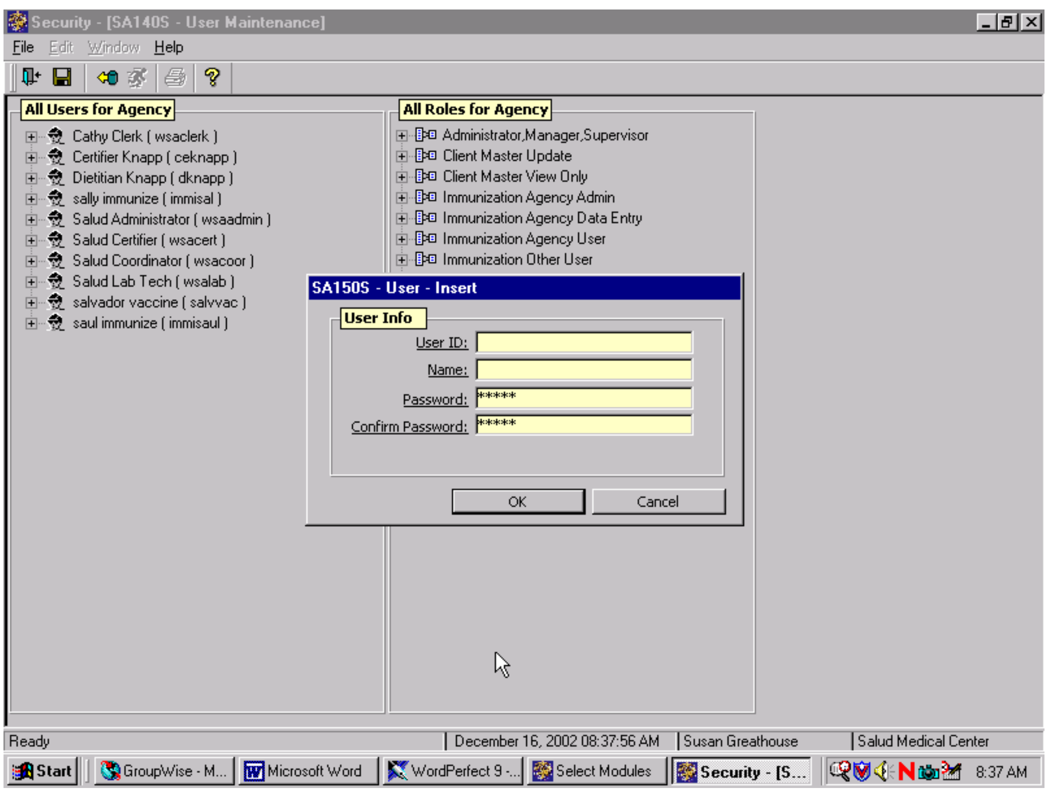

Figure 2: "Insert User" Pop-Up

3. **Type in a User ID in the "User ID" field.**

   This should be the staff person's logon ID in your local agency.

4. **Type their full name in the "Name" field.**

   This is how their User name will appear in the User list.

5. **Type in a User password.**

   - The password must contain 6 or more alphanumeric characters and must begin with an alpha character.
   - As Coordinator or System Administrator, you may want to always assign the same password to you all of your staff, and then have them change it the first time they log-in. For example, you could use the same 6-letter password "healthy" for all new users and to reset passwords.
   - You must retype the password in the "**Confirm Password**" field.

6. **Click "OK."**

   This will bring you back to the "**Security - User Maintenance**" screen.

Removing a User

1. **To remove a "User," position the cursor on the staff name you are removing. Right click on the mouse to display a choice of four actions. See above for list of actions displayed.**

2. **Select "Edit User Roles."**

   User roles need to be deleted prior to removing the user.

3. **Click "Clear All", and then Click "OK."**

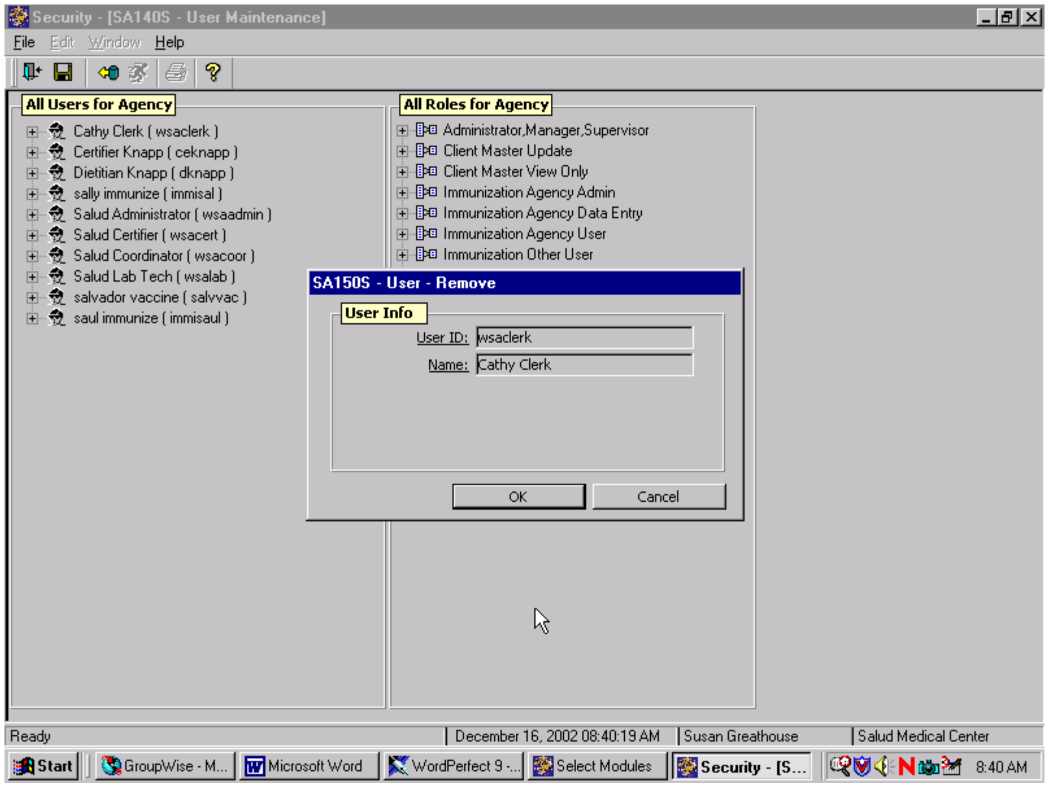

Figure 3: "Remove User" Pop-Up

4. **Right Click on the user name. Select "Remove User."**

5. **Verify the User name as shown.**

6. **Click "OK"**

   Once you select "**OK**," you will remove this User from the List of Users. This will bring you back to the "**Security - User Maintenance**" screen.

Editing an Existing User

1. **To edit a "User," position the cursor on the user name to be edited. Right click on the mouse to display a choice of four actions. See above for list of actions displayed.**

2. **Select "Edit User."**

   This will activate a new pop-up window and will allow you to edit the selected user information.

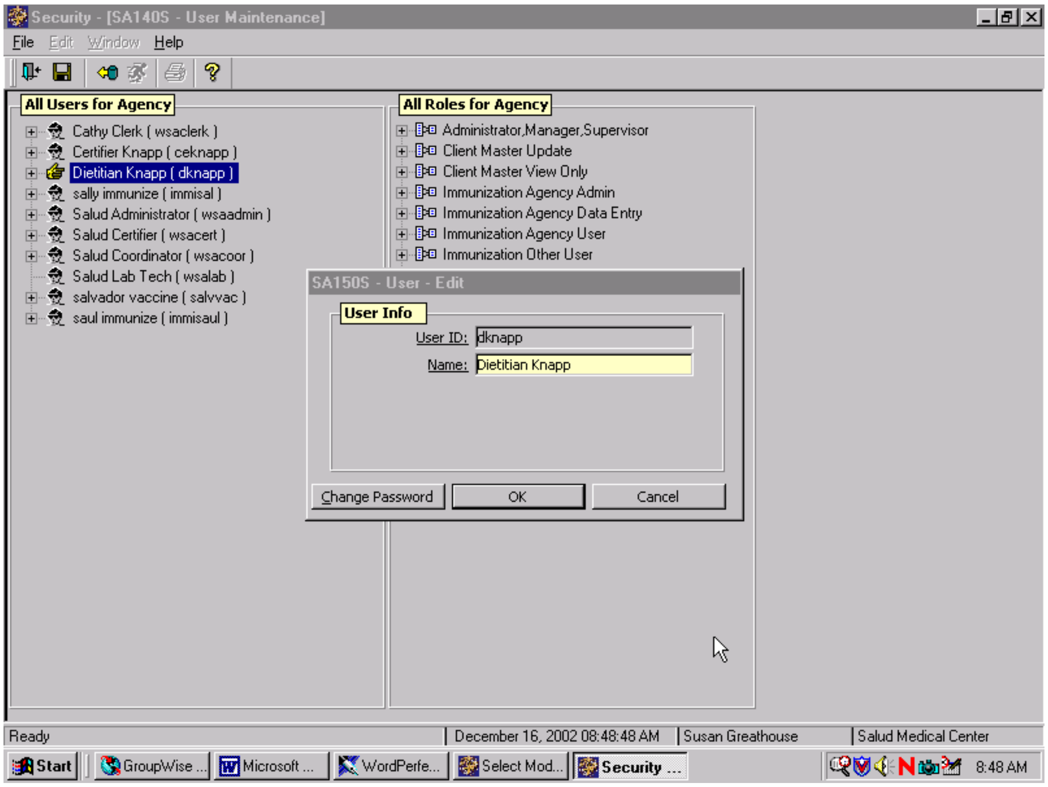

Figure 4: "Edit User" Pop-Up

3. **Verify the User name as shown.**

   This is the User information you will be editing.

4. **You may change two pieces of information in this window:**

   - User Name and/or
   - User's Password

5. **To change the "User Name," type the new information over the highlighted existing "name."**

6. **To change the password, click on the "Change Password" button.**

   - A new pop-up window will appear allowing you to change the user's password.
   - Use this function to reset a user's password when they forget it.

7. **Type the new password, and then type it again in "confirm password" field.**

8. **Click "OK."**

This will confirm that the password and the confirmation match. If they do not, an error message will pop up prompting you to re-enter the information. If they do match, you will return to the "**Edit User**" pop-up.

9. **Click "OK" again.**

This will bring you back to the "**User Maintenance**" screen.

Assigning Roles

1. **To assign user roles, position the cursor on the user name. Right click on the mouse to display a choice of four actions. See above for list of actions displayed.**

2. **Select "Edit User Roles."**

This brings up a pop-up with all the agency roles listed.

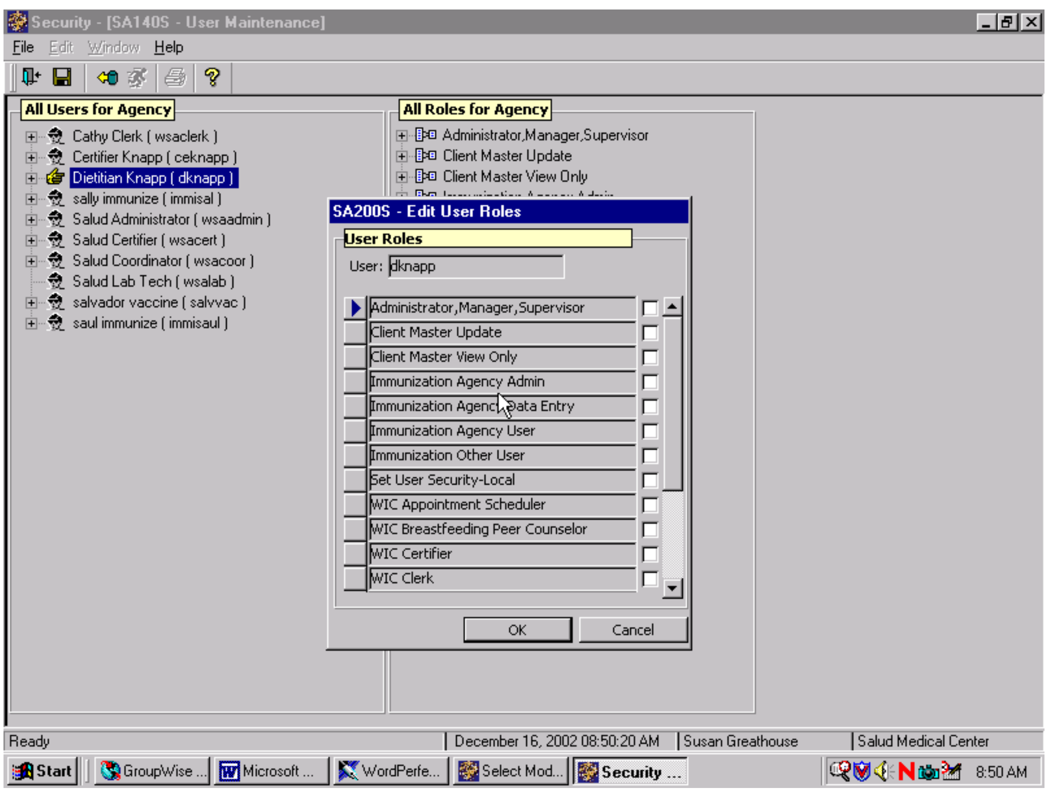

Figure 5: "Edit User Roles" Pop-Up

3. **Click on the roles that you would like to assign to that user.**

4. **When you are done, click "OK" to save and close the pop-up.**

♫ NOTE: Another way to add a role to a User name is to drag the User name to the security role to be added on the Roles List. This step may be repeated until all desired roles have been assigned. Click "**Save**" and the roles will be added.

Removing a Role

There are two different ways that User roles can be removed.

Preferred Method

1. **To remove user roles, position the cursor on the user name. Right click on the mouse to display a choice of four actions. See above for list of actions displayed.**

2. **Select "Edit User Roles."**

   This brings up a pop-up with all the agency roles listed.

3. **Click on the check marks next to the roles that you would like to remove from that user to "un-select" them.**

4. **When you are done, click "OK" to save and close the pop-up.**

Alternate Method

1. **Go to the Role to be removed in the Roles List and highlight the desired role and double click on it, or click on the "+" sign to expand the list. This will list all the Users in your agency who have been assigned this role.**

2. **Click on the User name. Right click on the mouse and a pop-up will display: "Remove User's Role."**

3. **Click on this pop-up to activate the "Remove User from Role" pop-up.**

   This will display the User name that was highlighted.

4. **If this information is correct, click "OK" to remove this role from this User.**

   This step may be repeated until all desired roles have been removed from this User.

5. **Click "Save."**

   The roles will be removed from the User name.

✂ *Tips and Shortcuts:*

- You should never allow your User ID to be used by anyone else.
- Never give your password to anyone except your System Administrator, and change it any time you think someone may know it.
- You may change your password at any time by clicking on the "Change Password" button when you login to TWIST. You will then be prompted to type your new password. Retype your new password a second time in the "Confirm New Password" field. Click on the "OK" button. Your password has been changed.
- To view the roles that are assigned to a User, you may click on the "+" sign in front of the User name and this will display the list of roles assigned.

➥ *Practice Activities:*

Follow these steps as you use your Data Entry Documents to enter your staff IDs, names, passwords and roles in the Production database.

1. Click on "Maintain."
2. Select "User."
3. Right mouse click in "User" area of screen to insert new user.
4. Select "Insert User."
5. Type in the User ID Logon in the "User ID" field.
6. Type in the actual staff name in the "name" field.
7. Type in the selected password in the "password" field.
8. Click "OK."
9. Add the rest of your staff IDs and passwords.
10. Select a "User" for whom you want to add roles.
11. Right mouse click and select "Edit User Roles."
12. Select appropriate roles for that user by putting a checkmark in box after each role.
13. Click "OK" to close pop-up and save roles.

✓ *Skill Check:*

The instructor will use the local agency Data Entry Documents to select a few staff and verify that the roles were assigned correctly.

✍ **Notes:**

Chapter 6: System Administration
Section 3: Satellite Clinics
Lesson: Satellite Clinics

Objectives

Upon the completion of this lesson all users will be able to:

- State the importance of laptop security and list the situations that security may be an issue.
- Correctly setup and use the necessary TWIST laptop computers and other equipment.

Overview

Using TWIST on a laptop for a satellite clinic is an easy process. You will be able to take laptops to remote sites and use them to provide most of the normal WIC services. Using air card, DSL, and wireless technology, you will be able to connect directly to TWIST and issue benefits.

Glossary

There are several terms that need to be defined before setting up the Satellite Clinic.

Satellite Clinic – A clinic that is not a permanent site and does not use the local agency's regular computer network. This necessitates the use of laptops in order to access and enter data into TWIST.

Laptop Workstations – All workstations at a Satellite Clinic are laptops which connect to TWIST through an Internet connection and the FamilyNet Web Access icon installed on the laptop desktop. No data is stored on the Laptop Workstation.

Air Card – Cell phone company device used to establish an Internet connection.

DSL – Stands for Digital Subscriber Line, a technology that provides a connection to the Internet through telephone lines.

Wireless – Technology that provides a connection to the Internet without the use of telephone or other communication wires.

Laser Printer – portable laser printer used in Satellite Clinics to print the participant's benefit list.

Considerations for Planning a Satellite Clinic

Receipt and Security of Equipment

Laptop equipment will be sent to the local agency configured appropriately to connect to TWIST and issue food benefits. Directions for any additional set up required will be provided by State WIC application support.

Laptop equipment is highly portable and therefore, easy to steal. You must have a secure place to store all equipment when it is not in use. Local staff must be trained in security procedures to make sure laptops and accompanying equipment such as air cards and portable printers are not left unattended during satellite clinics.

Connecting to the Internet at the Satellite Clinic

The steps you follow to connect to the Internet will depend on the Satellite Clinic location. Follow the steps in the job aid to set up the laptops and Internet connection while working in a satellite clinic.

See Job Aid on "Setting Up an Internet Connection on Laptops at Satellite Clinics" for more information.

Printing a Benefit List from Laptops at Satellite Clinics

1. When working with TWIST from a laptop with an air card, you will connect one laptop to your portable laser printer with the connecting USB cable. The laptop connected to the printer will be the printing laptop, but it can also be used as a workstation.

♫ Note: You will have to plan for adequate table space for the laptops and printers when setting up equipment for a satellite clinic. Equipment and the associated cables and cords needs to be out of reach of children and should be secured whenever unattended.

✍ *Notes:*

Chapter 6: System Administration
Section 4: End Of Day
Lesson: Special User – End of Day

Objectives:

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

- identify what activities and outputs (including notices and reports) are generated as a result of End of Day processing.

Overview:

Every day large amounts of data will be entered into TWIST. This information is available to users immediately, however each night the system will need to do a little house keeping. The term "End of Day" (EOD) describes a series of "house keeping" jobs that will automatically be run nightly to update the central database. Just like jobs around the house these jobs may be done daily, monthly and quarterly/annually.

The End of Day process will be scheduled to run at a specific time each night after all clinic staff have completed their work for the day, usually about 8:00 PM. The process is run from the state computer workstation located in the Salem computer room. The process runs automatically and only authorized state users will be able to intervene to stop, delay or initiate the process.

The End of Day process will produce a series of reports. These reports will be available through TWIST, as a file menu item in the Output menu of the individual modules, such as Appointment Scheduler. These reports provide useful information to local agency staff.

In this lesson you will learn what "jobs" are run and when they are run.

Instruction:

Reviewing Daily End of Day Processes

Each night (at about 8:00 PM) the system will perform the following jobs.

1. **Backup the database.**
   The State computer department will be in charge of doing backups.

2. **Check for transfers in and out of Oregon and create a report.**
   The "**Transfers-In/Transfers-Out Within Oregon**" report will be available as a file menu item from the Client Processes/Reports/Intake.

3. **Automatic termination of deceased clients.**
During the EOD process each day TWIST will check for and terminate from WIC any FamilyNet clients who are marked as deceased in the Client Master system. Future appointments will be canceled. A graduation notice will not be printed or sent to clients terminated because they are deceased.

4. **Document appointment "no shows".**
EOD will automatically change the appointment status of any appointment "**booked**" for that day that is not marked as either "**show**" or "**walk-in**" to "**no show**".

5. **Bank Interface.**
All interaction with the bank, such as redemptions, rejections, etc., will take place during EOD.

Commented [WKM1]: Malini, should we delete this whole section since we have the real-time interface, or is there something we should say about the redemption or any other batch files?

6. **Update the "Priority Freezing" screen.**
EOD will automatically uncheck the "freeze" check box (thereby turning off the freeze) when the priority freeze end date is passed.

7. **Create breastfeeding callback report.**
The system will create a notification to staff when the callback date nears in the form of a report accessible as a file menu item (through Reports module or Client Processes).

8. **Generate appointment data for the ANSWR appointment reminder system.**

The ANSWR statewide appointment data extracts are generated according to the following schedule:

Extract from End of Day:	Messages Sent:	For Future Appts. On:	For Missed Appts. On:
Sunday	Monday	Wednesday	Thursday, Friday and Saturday
Monday	Tuesday	Thursday	N/A
Tuesday	Wednesday	Friday	Monday
Wednesday	Thursday	Saturday and Monday	Tuesday
Thursday	Friday	Tuesday	Wednesday

9. **Automatically terminate clients with "Eligibility Pending" status greater than 30 days.**
If, after 30 days, the "**Eligibility Pending**" check box is still checked, TWIST will auto-terminate the client during EOD. The reason code will be "*Did not provide proof of ID, residency, or income*."

10. **Formula Warehouse Order Processing**

Formula warehouse orders placed during the day will be processed and sent to Providence. A report with rejected orders will be send to state staff to follow up with the appropriate local agency.

Reviewing Monthly End of Day Processes

At various dates during the months, TWIST will perform the following jobs.

1. **Automatic termination of clients no longer eligible.**

At the end of each month, the system performs a series of checks to determine which clients need to be terminated, such as clients 30 days past their certification period, or clients that are no longer categorically eligible. Future appointments are cancelled, except for appointments for clients who are reinstating.

2. **Delete temporary WIC ID numbers and incomplete new enrollment records.**
Pre-screened applicants are deleted from the WIC database 90 days after they miss their latest scheduled certification appointment or are left on the wait list with no action. If the applicant is not placed on the wait list or given an appointment, the applicant is dropped from the WIC database 120 days after being entered if they are not certified by that time. Incomplete new enrollment clients are deleted if they have not been certified within the last 90 days.

3. **Perform automatic category changes.**
TWIST automatically changes category for clients based upon their certification category codes, current date and birth date.

4. **Create "Automatic and Manual Termination Report."**
The User can access this report as a file menu item to review a list of all automatic and manual terminations for the month that has just ended.

5. **Update Participating Caseloads.**
The Current Statewide Caseload figure will be updated with any adjustments to caseload made either from the Adjustment Activity or Percentage Adjustment screens.

6. **Print graduation notices.**
   The system will automatically print graduation notices during End-of-Day for all clients automatically terminated or who did not have a graduation notice printed by the user when they were manually terminated.

7. **Delete unfilled appointment requests.**
   Unfilled appointment requests will be deleted two months after the request month on the first business day of the new month.

8. **Delete appointment scheduler records over twelve months old.**

9. **Capture and print out status of End of Day/Month Activities.**
   The system will generate a message indicating that either End of Day failed to complete successfully or End of Day completed successfully. If the process failed, the system message will direct the user to contact the system administrator. The cause of EOD failure will be explicitly stated in the EOD status logs.

Reviewing Quarterly/Annual End of Day Processes

The following reports are run on a quarterly or annual basis.

Quarterly Reports

1. **Vendor Quarterly Profiles.**

   This report provides detailed reporting about specified vendors.

2. **Dual Participation Report.**
   This report indicates possible dual participants.

Annual Reports

Normally run annually and reports on the previous year, some reports can be run on demand for other specified date ranges.

1. **Number of Weeks Breastfed.**

2. **Week Formula Introduced.**

3. **Infant Breastfeeding Demographics.**

4. **Breastfeeding Intention.**

5. **Breastfeeding Women Demographic Profile.**

➥ *Practice Activities:*

Review the variety of EOD processes and discuss which Local Agency staff will be responsible for monitoring and following-up on associated activities and outputs.

✔ *Skill Check:*

1. List three jobs run during the daily EOD process.

✎

Circle True (T) or False (F) for each of the following questions.

2.	T or F	No reports are printed automatically. The User must access the reports as a file menu item and print them as needed.
3.	T or F	The Number of Weeks Breastfed report is normally run annually.
4.	T or F	The system will automatically delete appointments older than three months.
5.	T or F	Unfilled appointment requests will be deleted daily.

✍ Notes:

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Chapter 6: System Administration
Section 6: TWIST Practice Database
Lesson: TWIST Practice Database

Objectives:

Upon completion of this lesson the user will be able to:
- access the TWIST Practice Database from their computer;
- identify the limitations of the Practice Database; and
- list the tasks needed to make the Practice Database functional in their agency.

Oregon Policies:

♦ 440 Nutrition Training Manual
♦ 450 Confidentiality

Overview:

Many of the functions in WIC are performed using the TWIST Data System. When new staff are hired or when new TWIST functions are released local agency staff need a place to learn and practice new skills. The TWIST Practice Database ("Practice") is a functioning database using TWIST software but populated with fictional participants. This database provides a learning environment where processes can be practiced without the confidentiality issues, program integrity concerns and risks inherent in working with real WIC participants.

"Practice" has some limitations because it does not have real benefit issuance and End-of-Day processes are not run against it. This lesson will show users how to set up their agency's practice clinics, and how to open and use the Practice Database ("Practice").

Instruction:

Accessing "Practice" Database

"Practice" Database is available to any WIC user when you log in to Citrix. It will show as an additional FamilyNet icon once you have logged into Citrix.

1. **Click on the "FamilyNet Practice" icon.**

Figure 2: "FamilyNet Practice" Icon

2. **Log in to "Practice" using the login and password given to your agency by state staff.**

- Logins will be your agency name if it is more than 6 letters long. Logins will be your agency name plus "staff" if it is shorter than 6 letters.

Example: "columbia" would be the login for Columbia County. "saludstaff" would be the login for Salud WIC.

- Passwords are set by the state as "healthy" and can be reset by the local agency.
- As many people as need access to "Practice" can login at the same time with the same login and password.
- You will know that you are in "Practice" by the unique color of the background in this database.
- You will also see the name of the database in the lower right-hand corner of the screen.

♫ Important Note: You should only access your own agency in "Practice!"

Figure 3: "Practice" Database Screen Notation

Setting up your "Practice" Agency and Clinics

The state WIC office will set up a generic agency and clinic(s) for you. In order for you to be able use all the normal functionality of TWIST while in "Practice" you may need to set up some functions for your agency as you do in the production environment. These only need to be set up if your staff want to practice a function requiring that information. For example, you only need a appointments set up if staff want to schedule appointments.

♫ NOTE: The number of clinics in your "Practice" agency will not match your real clinics. Extra clinics make "Practice" unwieldy and slow. Most agencies will have a single clinic named "Main." One clinic is adequate to train most staff. Only very large agencies will have additional clinics in order to have enough participants to speed access for all staff. **Do not** add extra clinics in "Practice."

Staff Information - Set up staff in the staff tables

The starting point for this section is:
Operations Management ⇨ Operations ⇨ Staff Information

- Refer to Chapter 8, Lesson 101, *Staff Information* for help.
- Including this information will allow you to schedule participants normally.
- You may use minimal information or false staff names if needed.
- Putting in special staff people will allow more realistic clinic scheduling. For example, you may want bilingual staff, RD or other high-risk staff.

Appointment Templates and Schedules Set up

The starting point for this section is:
Appointment Scheduling ⇨ Scheduling ⇨ Template Maintenance

- Refer to Chapter 4, Lesson 200, *Template Maintenance* and Lesson 201, *Template Scheduling Options* for more information.
- You must set up appointment functions in your agency in order to schedule participants.
- You may choose to make these schedules very realistic to mirror your normal clinic operations or make them very generic for practice purposes.

Second Nutrition Education - Create classes

The starting point for this section is:
Appointment Scheduling ⇨ Tables ⇨ Nutrition Education Classes

- Refer to Chapter 4, Lesson 401, *Group Scheduling* for more information on setting up classes.

- This will allow you to make requests for GE classes.
- Classes need to be set up for each clinic you plan to use.

Finding Participants from your Agency

Participants can be added to “Practice” by staff using the database.

♫ NOTE: No real client data should be entered in “Practice” due to confidentiality issues.

There are many participants already populating your agency. These participants are copied from the training agency (Ford). In “Ford” we have 14 participants with the same name that are only differentiated by their middle initial. Each of those participants have been duplicated for your agency but now include your agency and clinic along with the original middle initial as their middle name, e.g. Fred Ford-Bronco-A Fossil.

♫ NOTE: Staff can be assigned a specific middle name and initial to work with. This will prevent staff trying to work on the same client at the same time.

♫ NOTE: Each month participants in “Practice” will have their ages and all dates in their record adjusted so that they remain in the same place in their certification period and the same category.

♫ Important Note – You should only work on participants assigned to your agency!

The starting point for this section is:
Any TWIST screen ⇨ Client Search Screen

1. **Search for the client using the first 3 letters of their last name, the first three letters of their first name**.

2. **Select your agency name from the agency drop down**.

3. **Click the “Search” button**.

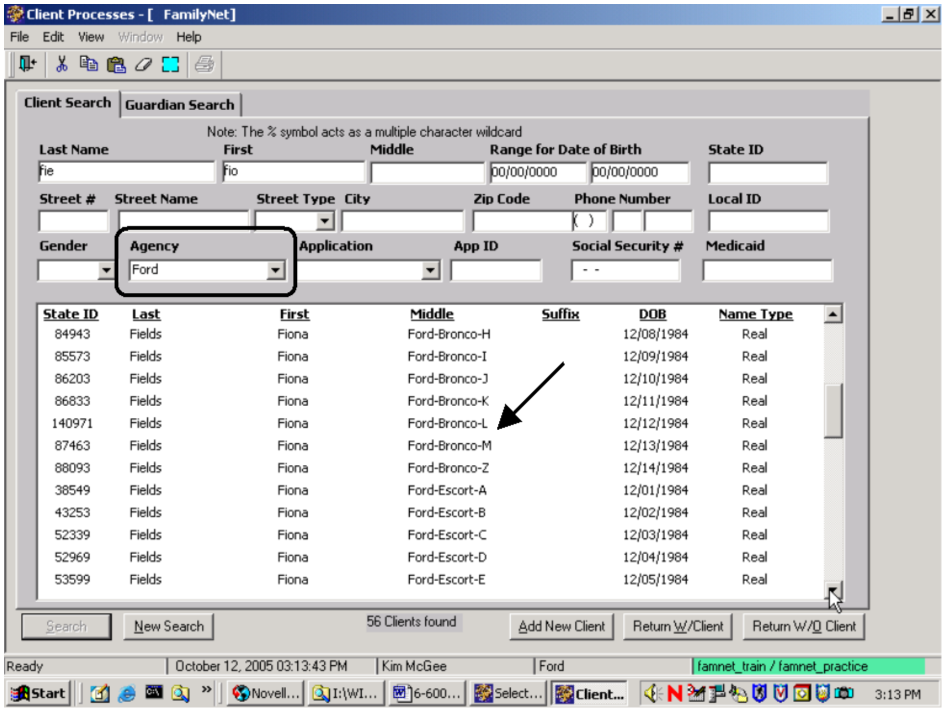

Figure 4: "Client Search" Screen

Issuing Benefits and eWIC Cards in Practice

The Practice Database is connected to a special training set up with Oregon's banking contractor. This allows you to issue benefits to practice participants as usual. You may also issue eWIC cards if you use the virtual card numbers assigned to the practice data base.

- Benefits issued are removed every month when the practice database is refreshed.
- Virtual eWIC card numbers can be reused each month after the database is refreshed.

Limitations of the "Practice" Database

"Practice" will not function like the production data system in several important areas.

- Call App Support to "Practice" made available to new staff.
- End-of-day processes do not run against "Practice." None of the functions resulting from this process happen in "Practice." E.g. participants are never automatically terminated.
- Client dates of birth and other dates in the record will change each month to keep them a constant age, category and month of their certification period. E.g. Sasha Seaside will always be due for a recert, no matter what month you access "Practice." Think "Time Warp." This process will happen on the last day of each month.
- Each month client data will be "rejuvenated." That means that any actions taken in "Practice" during the month will be erased and everything will return to the way it was at the start of the month. This includes benefit issuance and all appointments or requests. That way we get to start with a clean slate at the beginning of each month. It also means that any participants you add to "Practice" will disappear at the end of the month.
- Due to the limitations of the Practice Database, do not call Application Support if you have issues or problems with the database. Close the offending screen or log out of "Practice" and try again. If "Practice" does not function as you expect, contact Kim McGee at the State WIC office.

✂ *Tips and Shortcuts:*

- Setting up your agency and clinic as close to reality in "Practice" will make staff practice time more applicable.
- Use the following client list to find a client that fits your required practice scenario.

➥ *Participants In "Practice"*

Participants marked with an asterisk (*) are due for a recertification.

Pregnant Women

- Anna Albany
- Sophie Bates
- Serena Creswell
- Dorena Drain
- Desiree Dundee
- Artrina Hines
- Lexi Lexington
- Maria Mikkalo
- Becky Noti
- Rae Ann Rainier
- Maria Redding
- Samantha Sandy
- Samantha Seaside

Breastfeeding Women

- Amy Ashland – WE twins
- Belinda Billings – WB
- Christina Cheyenne – WE
- Fiona Fields – WE
- Sondra Spokane – WB

Infants

- Andrew Ashland – IE7-12
- Abby Ashland – IE7-12
- Billy Billings – IB4-6

Infants Continued

- Christopher Cheyenne – IE7-12
- Freddie Fields – IE0-3
- Forest Grove – IN4-6 (on medical formula)
- Sparky Spokane – IB4-6
- Julie Tidewater – IN4-6

Children

- Anthony Allegheny – C1
- Brittany Bates – C1
- Darla Dayton – C1
- Francine Fields – C2-5
- Fred Fossil – C2-5 (partially completed recert)
- Frannie Foster – C2-5
- John Jackson – C2-5
- Katrina Keizer – C1
- Levi Lexington – C2-5
- Negril Nehalem – C1
- Serena Sandy – C2-5
- *Sasha Seaside – C2-5
- Toby Texas – C2-5
- Veronica Vida – C2-5

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Chapter 7: Reports
Section 1: Reports
Lesson: Using Reports

Objectives:

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

- know how to access, run, print and export reports.

Overview:

Most of the reports you need to run your clinic efficiently are available on-line within TWIST. With a few clicks of your mouse you will be able to access the information you need quickly and easily.

There are reports for every functional area in TWIST. These include quality assurance reports that can be used to monitor your compliance with state and federal regulations, reports to use for managing your appointment scheduling, reports that generate information for clients, and staff productivity reports just to name a few. Although this lesson does not cover all reports, it will teach you how to access the reports you need.

Some reports are designed specifically for local agency use while others are designed for state use only. There are quality assurance reports for most areas among the reports the state will use. These will be used to help track local agencies compliance with state and federal regulations and will be utilized when doing local agency reviews.

Instruction:

Running Reports

Reports are separated into each functional area of TWIST. In each module they are found under the “Outputs” menu.

For this lesson, we are using the “Daily Clinic Schedule Report” which is in the Appointment Scheduler module.

The starting point for this lesson is:

Select Modules ➪ Appointment Scheduler ➪Output

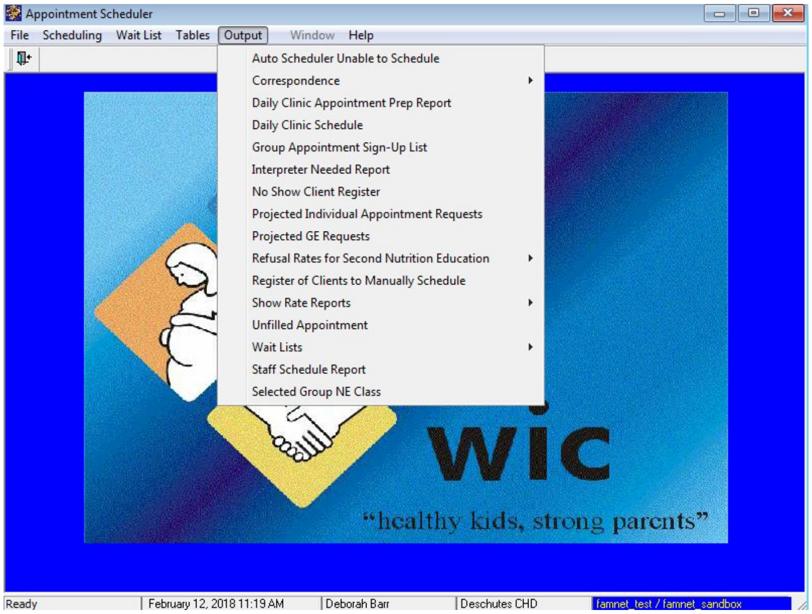

Figure 1: Sample of Reports in Appointment Scheduler

Select the report to run. For this lesson, use "Daily Clinic Schedule."

This will bring up a blank screen with selection criteria for the report you want to run.

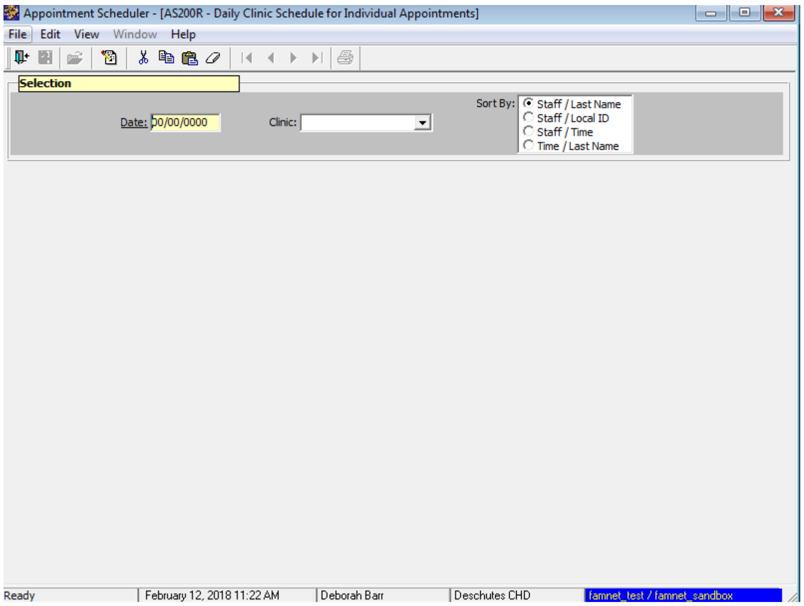

Figure 2: "Daily Clinic Schedule" Report Selection Criteria

Enter selection criteria.

- Selection criteria are used to limit or expand the search for the information you are looking for.
- If a certain criterion is mandatory the field will be yellow.

- If there is data present that meets your selection parameters, the report will display. If there is no data present that meets your selection parameters, a message stating "*no data found*" will display.
- The data can be reviewed (if more than one page in length) in a variety of ways. You have the option of scrolling through the data using the View menu bar, the Toolbar arrows or the side/bottom scroll bars.

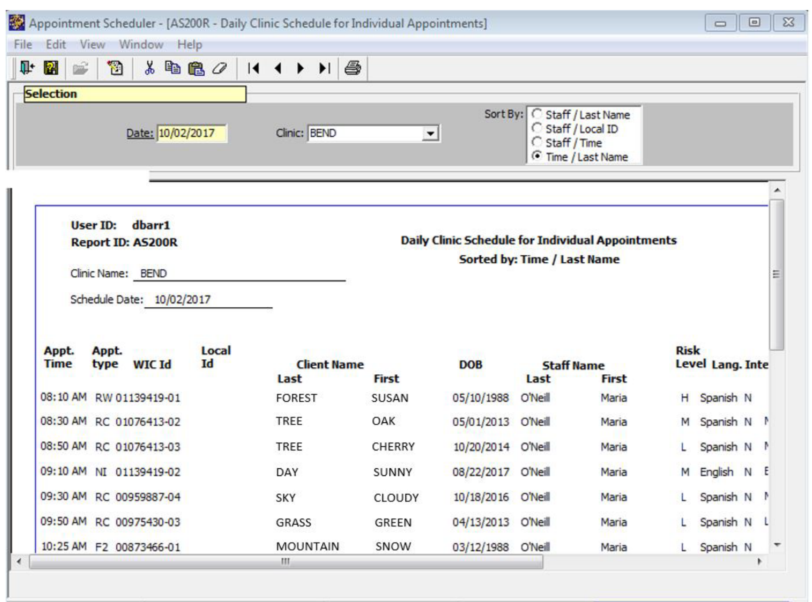

Figure 3: "Daily Clinic Schedule" Report

- The report will appear in a print preview mode. Be sure the blue margin includes all the data you would like printed. If the data is located outside this blue box, you will need to use legal-size paper when printing.

- Only some reports can be exported to Excel. If the report can be saved directly into Excel, the “Save As” icon will automatically appear toward the left-side of the Toolbar.
- The report can be saved on your local computer. This is useful to filter and analyze the data.
- It is helpful to save the report with a unique file name.

♫ **NOTE**: The first time you use the “Save As” icon, check the location of where the file is saved. To save to your local computer drive, following these instructions.

In the “Save As” pop-up window:

Network ⇨ Desktop ⇨ Computer ⇨ (find your files)

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Chapter 8: Operations Management
Section 1: Operations Management
Lesson: Breast Pump Inventory and Tracking Reports

Objectives:

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

- view and add breast pumps to the "**Breast Pump Inventory**" table;
- change the status of a Lactina or EnDeare pump in the table; and
- view and print the "**Multi-User Pump Tracking**" and "**Breast Pump Inventory**" reports.

Oregon Policies:

♦ 712 Breastfeeding: Breast Pump Ordering, Distribution and Tracking Guidelines

Overview:

The "Breast Pump Inventory" table, "Breast Pump Inventory" report and "Multi-User Pump Tracking" report are used in conjunction with the "Breast Pump Issuance" screen to issue, track and maintain breast pump inventories. Information in the inventory table and reports is automatically updated when breast pump information is entered in the "Breast Pump Issuance" screen. For more information see Chapter 3, Lesson 600 *Breastfeeding Tracking*.

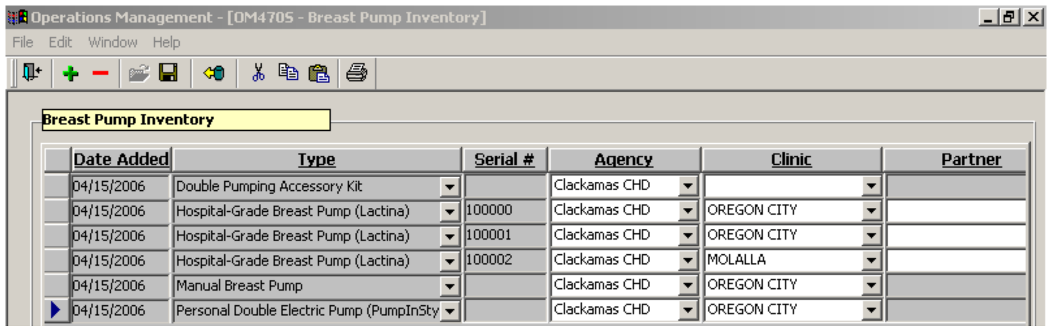
Instruction:

Using the Breast Pump Inventory Table

The starting point for this lesson is:

Operations Management ⇨ Tables ⇨ Breast Pump Inventory Table

Adding a Lactina *or* EnDeare *to the Inventory*



Date Added	Type	Serial #	Agency	Clinic	Partner
04/15/2006	Double Pumping Accessory Kit		Clackamas CHD		
04/15/2006	Hospital-Grade Breast Pump (Lactina)	100000	Clackamas CHD	OREGON CITY	
04/15/2006	Hospital-Grade Breast Pump (Lactina)	100001	Clackamas CHD	OREGON CITY	
04/15/2006	Hospital-Grade Breast Pump (Lactina)	100002	Clackamas CHD	MOLALLA	
04/15/2006	Manual Breast Pump		Clackamas CHD	OREGON CITY	
04/15/2006	Personal Double Electric Pump (PumpInSty		Clackamas CHD	OREGON CITY	

Figure 1: Breast Pump Inventory Table

1. **Click the "Insert" icon to add a row.**

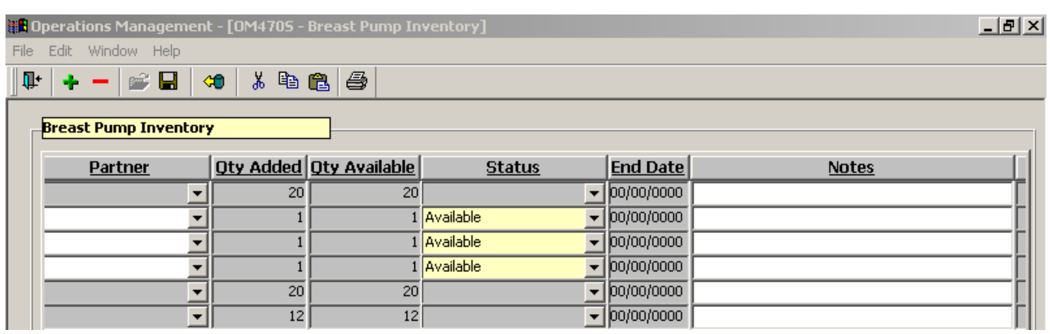
2. **The "Date Added" field defaults to today's date but can be modified.**

3. **In the "Type" field, select "Hospital-Grade Breast Pump (Lactina)" or "Multi-User Breast Pump (Hygeia EnDeare)" from the drop down list.**

4. **Complete the "Serial #" field by typing in the pump's serial number. For EnDeare pumps, include the H in the serial number.**

5. **Complete the "Agency" field by selecting your agency from the drop down list.**

6. **Complete the "Clinic" field by selecting the clinic from the drop down list. This field is optional.**



Partner	Qty Added	Qty Available	Status	End Date	Notes
	20	20		00/00/0000	
	1	1	Available	00/00/0000	
	1	1	Available	00/00/0000	
	1	1	Available	00/00/0000	
	20	20		00/00/0000	
	12	12		00/00/0000	

Figure 2: Breast Pump Inventory Table

7. **If needed, complete the "Partner" field by selecting the partner from the drop down list. If the "Agency" field is left blank, the "Partner" field becomes mandatory.**

♫ Note: Portland metro area pump partners and their assigned breast pumps are added to TWIST by the state WIC office and will automatically appear in your inventory. To add *Local* pump partners, contact the state WIC office.

8. **The "Qty Added" field for Lactina and EnDeare pumps is always 1. Type a quantity of "1" in this field.**

9. **Complete the "Status" field by selecting *Available* from the drop down list.**

10. **When *Available* is selected in the "Status" field and "Save" is performed, the "Qty Available" field will be populated with "1".**

11. **If needed, double click in the "Notes" field to enter a free form note.**

♫ NOTE: User can sort this table by **Type**, **Serial #**, **Agency**, **Clinic**, **Partner,** or **Status** by clicking on the appropriate column heading.

Adding Other Types of Breast Pumps to the Inventory

1. **Click the "Insert" icon to add a row.**

2. **The "Date Issued" field defaults to today's date but can be modified.**

3. **Complete the "Type" field by selecting the appropriate pump type from the drop down list.**

4. **Complete the "Agency" field by selecting your agency from the drop down list.**

5. **Complete the "Clinic" field by selecting the clinic from the drop down list. This field is optional.**

6. **Complete the "Qty Added" field by typing in the quantity of pumps.**

NOTE: Entering personal pumps is required. Entering manual pumps is recommended but not required.

Changing Multi-User Pump Status (Lactina or EnDeare)

1. **Change the information in the "Status" field by selecting a new status from the drop down list.**

♫ Note: There are 8 pump status types in TWIST. Three status types change automatically when information is entered in the "Breast Pump Issuance" screen. For example, when a Lactina or EnDeare pump is issued, the status changes from *Available* to *Issued* and when a return date is entered the status changes back to *Available.* The status of a Lactina or EnDeare changes to *Under Investigation* when the "Referred to State" field is completed. The other five status types must be manually selected in the "Breast Pump Inventory" table. These status types are *In-House Cleaning* (optional), *Permanently Out of Service*, *Returned to Manufacturer*, *Lost by Agency*, and *Unrecoverabl*e. The *Lost by Agency* and *Unrecoverable* statuses can only be entered by state office staff.

Viewing the Multi-User Pump Tracking Report

The starting point for this lesson is:

Client Processes ⇨ Outputs ⇨ Reports ⇨ Nutrition Education ⇨ Breastfeeding ⇨ Multi-User Pump Tracking Report

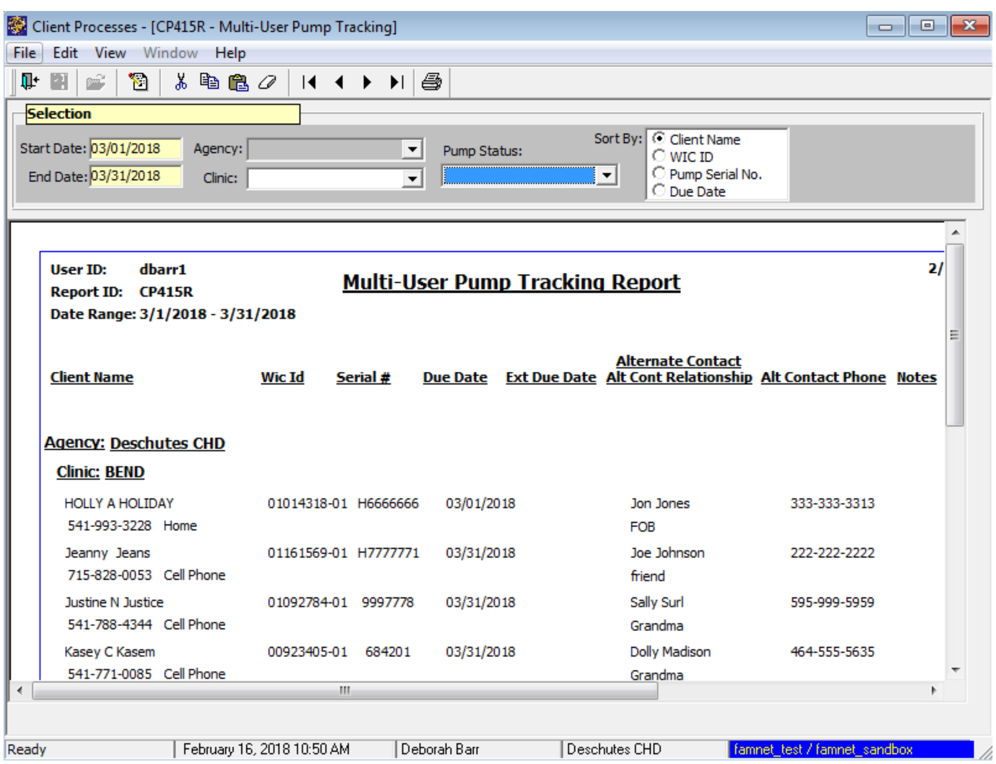


Figure 3: Multi-User Pump Tracking Report

1. **Enter a range of breast pump return due dates in the “Start Date” and “End Date” fields.**

2. **Select a clinic from the drop down list in the “Clinic” field or leave this field blank to run a report for all clinics.**

3. **Select a pump status type in the drop down list in the “Pump Status” field or leave this field blank to run the report for all status types.**

4. **Select a sort preference in the “Sort By” field.**

5. **Click on the “Run” icon to view the report.**

6. **Click on the “Print’ icon to print the report.**

Viewing the Breast Pump Inventory Report

The starting point for this lesson is:

Operations Management ➩ Outputs ➩ Breast Pump Inventory Report

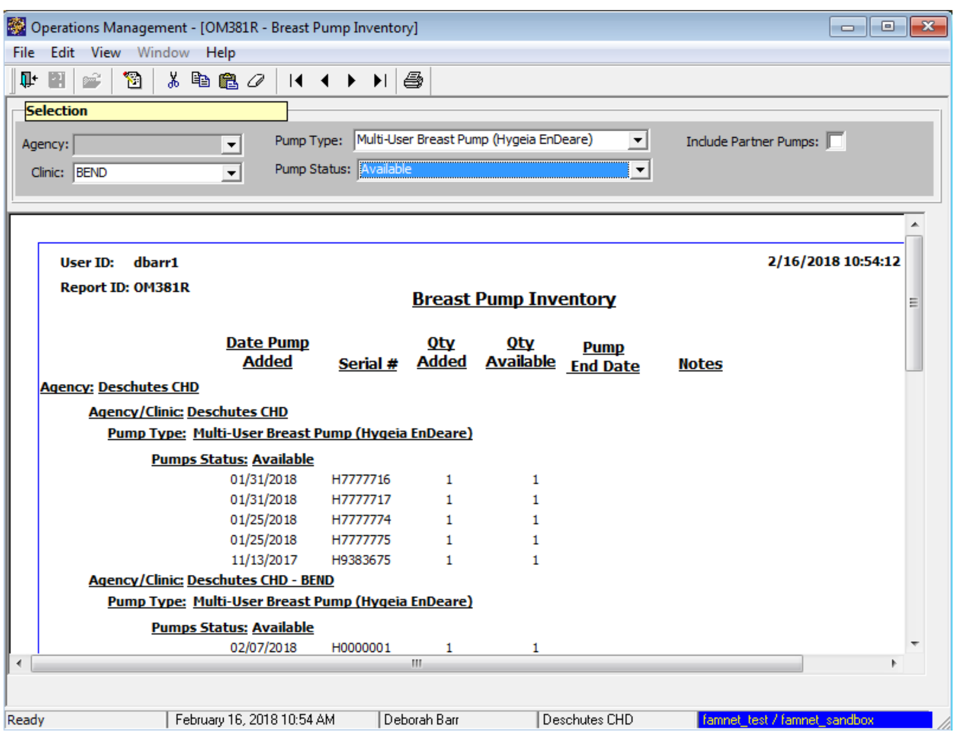


Figure 4: Breast Pump Inventory Report

1. **Enter the "Pump Type" from the drop down menu.**

2. **Select a clinic from the drop down list in the "Clinic" field or leave this field blank to run a report for all clinics.**

3. **Select a pump status type in the drop down list in the "Pump Status" field or leave this field blank to run the report for all status types.**

4. **To include "Partner Pumps" in the report, check the checkbox. These include only the partner pumps from are local agency specific partners.**

5. **Click on the "Run" icon to view the report.**

6. **Click on the "Print' icon to print the report.**

NOTE: The end of this report also shows totals for all pumps.

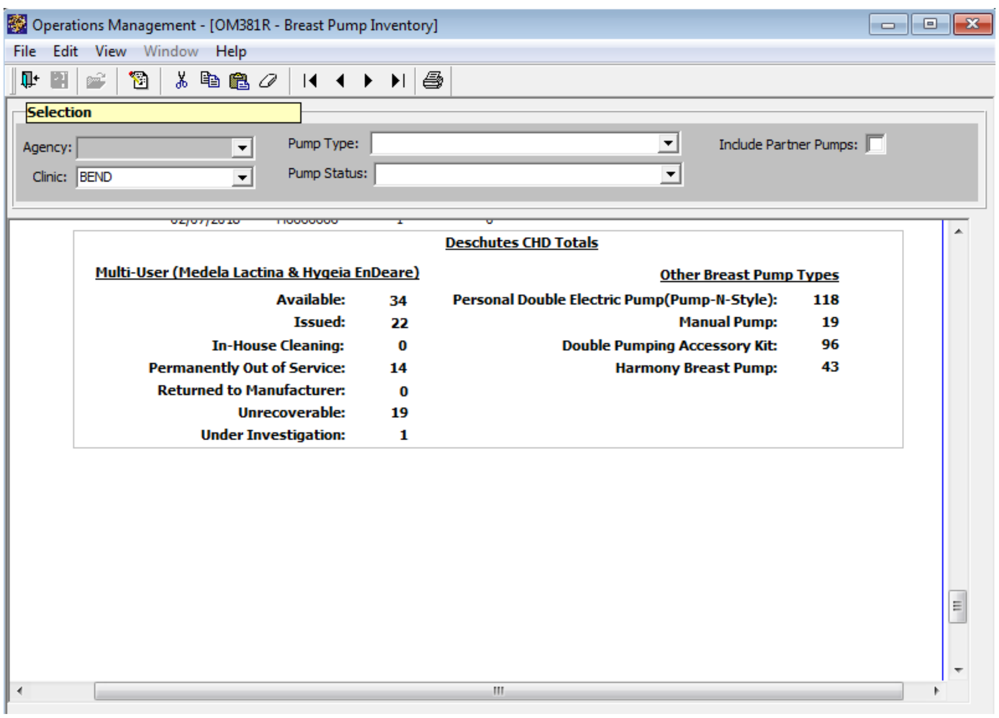


Figure 5: Totals Box in Breast Pump Inventory Report

✍ **Notes:**

Chapter 9: Financial Management
Section 2: Priority Freezing
Lesson: Special User - Priority Freezing

Objectives:

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

- set priority freezing for different priorities; and
- end-date priority freezing when no longer needed.

Oregon Policies:

⊄ 475 Waiting List
⊄ 653 Participant Transfers Into and Out of State of Oregon
⊄ 654 Participant Transfers Within State
⊄ 670 Risk Criteria Overview

Overview:

Priority freezing is a tool to manage caseload when a local WIC agency is serving its maximum assigned caseload. The Waiting List policy should be reviewed carefully and the decision to freeze priorities discussed with and approved by the state WIC office before a local agency freezes priorities. A participant who, at certification or recertification, falls into a priority that is frozen will not be able to be certified. You will have the option to place the participant on the "Priority Ineligible" wait list to track these participants in the event that you are later able to un-freeze that priority and serve more participants.

The participant priority system for Priorities I through VI must be followed when freezing priorities. For example, a local program cannot freeze priority V unless they have first frozen priority VI. The Priority Freezing function also allows for prioritizing within a priority to more closely manage caseload. For example, you may choose to freeze Priority V four year olds, while still serving Priority V children who are less than four year olds.

Please be sure to review the TWIST lesson on "Wait Lists" in Chapter 4, Section 8, when planning on using the priority freezing function.

Instruction:

Freezing Priorities

The starting point for this section is:
Financial Management ➔ Caseload ➔ Priority Freezing

1. **Add a new row using the green "+" sign if needed.**

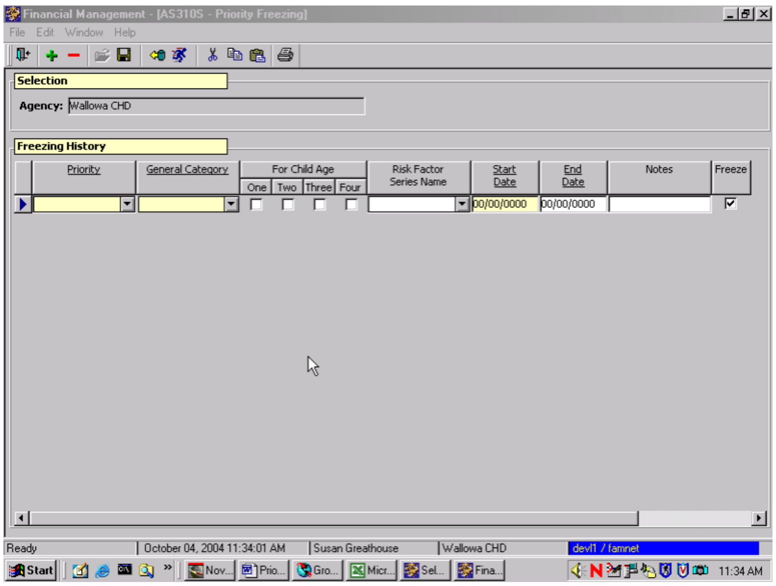


Figure 1: "Priority Freezing" Screen

2. **Select the Priority you want to freeze from the drop down window.**

+ NOTE: You must freeze the lowest priority first. Refer to Policy 475 for requirements around priority freezing.

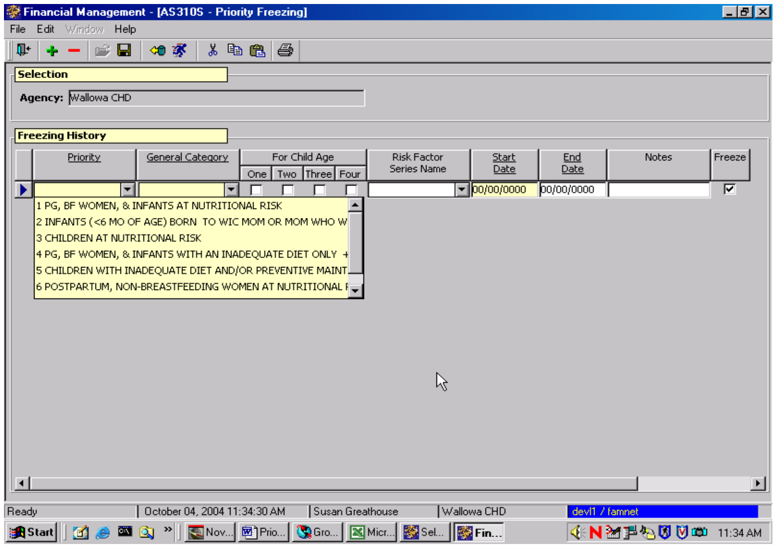


Figure 2: Selecting Priority Level

3. **Select the General Category from the drop down window.**

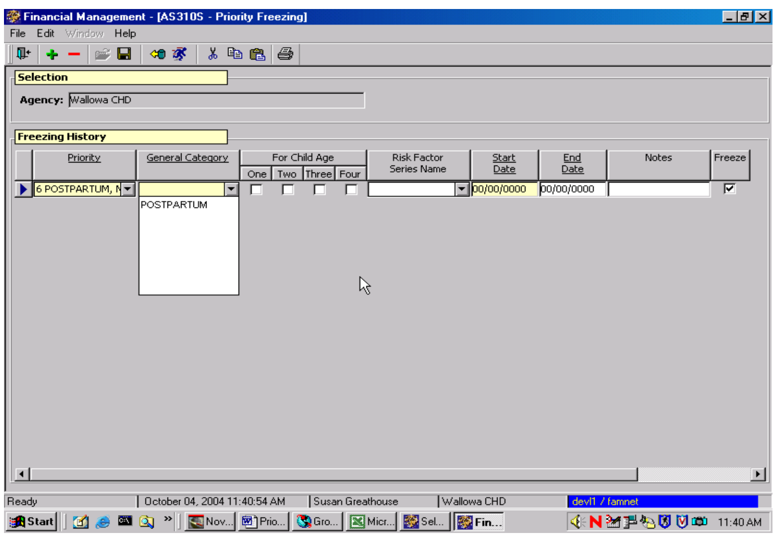


Figure 3: Selecting the "General Category"

4. **If you are freezing either Priority V or Priority III, select the appropriate "Child Age" by clicking in the box under that age.**

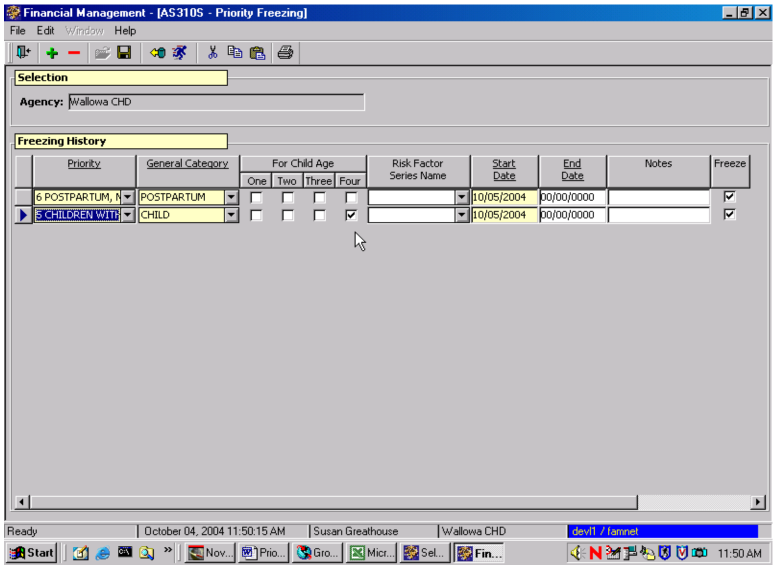


Figure 4: Selecting "Child Age"

+ NOTE: If you are freezing for more than one age of children, for example 3 and 4 year olds, you will need to use a separate row for each age.

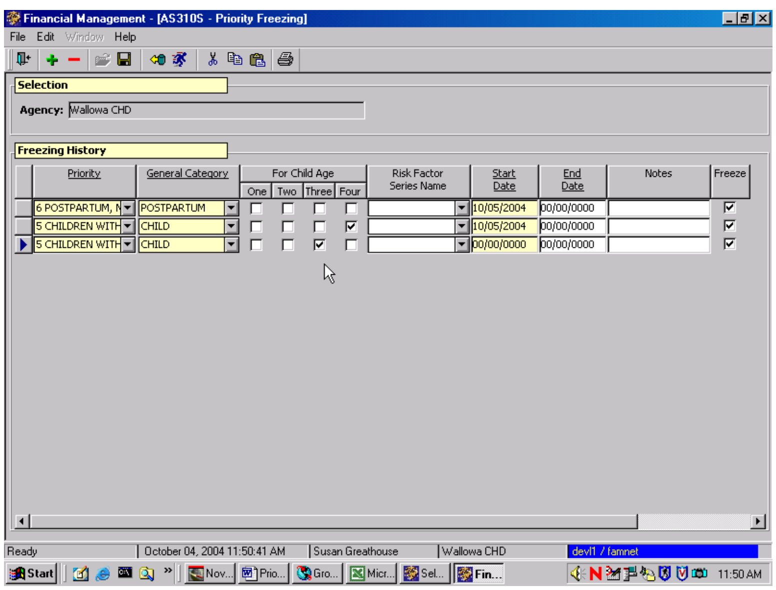


Figure 5: Selecting More Than One "Child Age"

5. **Enter the "Start Date" when you want the Priority Freezing to take effect.**

- It is not necessary to enter an end date at this point unless you know when you are going to stop freezing for that priority.

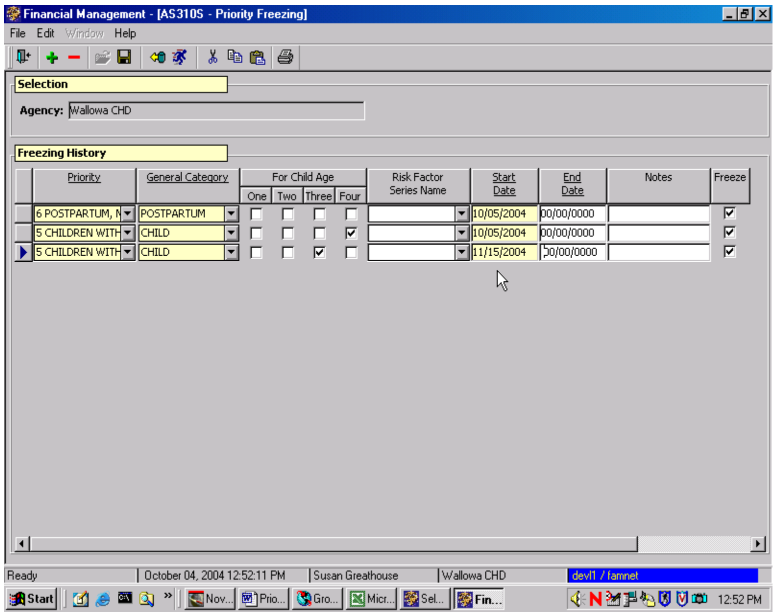


Figure 6: Entering a "Start Date"

6. **Enter notes if needed into the "Notes" field by double-clicking in the "Notes" box and typing in your note.**

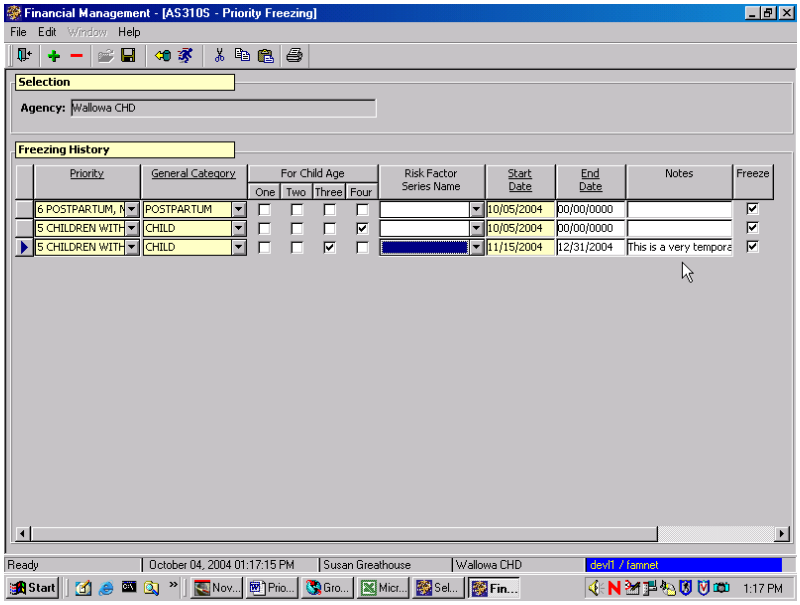


Figure 7: Adding "Notes"

7. **Save and exit.**

(Practice Activity 1:

Using your K Activity Sheet, follow the steps below to.

The starting point for this section is:
Financial Management ➔ Caseload ➔ Priority Freezing

1. Select "6 Postpartum Non-Breastfeeding Women" in "Priority"
2. Select "Postpartum" in the "General Category"
3. Enter today's date in the "Start Date"
4. Save and exit.

Ending Priority Freeze

Once you save a Priority Freeze screen, you cannot remove that row. In order to end priority freezing, you must enter an end date in that row in the "Priority Freezing" screen.

The starting point for this section is:
Financial Management ➔ Caseload ➔ Priority Freezing

1. **Enter the date when you want to end priority freezing in the "End Date" for the priority that you are "un-freezing".**

+ NOTE: Remember, you must unfreeze the highest priority first.

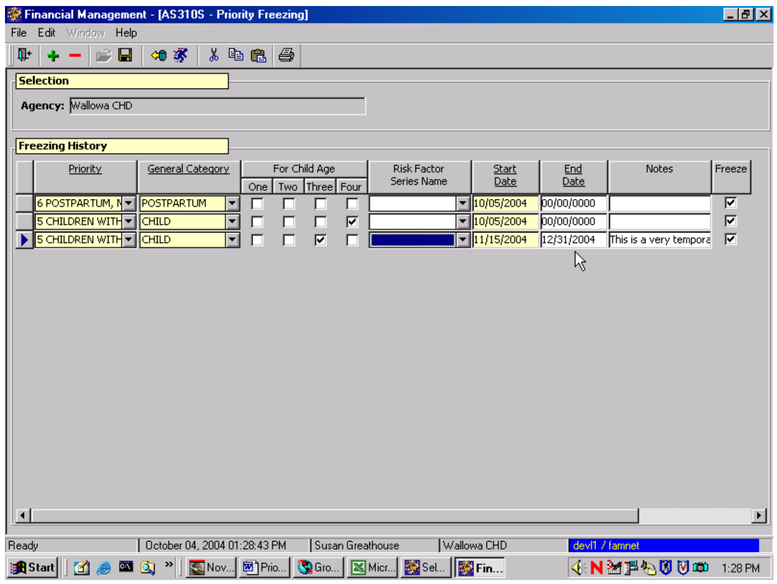


Figure 8: "End Date" for Removing Priority Freeze

2. **Save and exit.**

3. **Check your agency's "Priority Ineligible Wait List" (if you have been using that function), to see if there are any participants who were in a "frozen" priority who are still eligible to be reactivated.**

   - You will want to contact participants to see if they are still in your service area and interested in participating in WIC again. If so, you can reactivate them from the Intake screen and issue FI's.

(*Practice Activity 2:*

Using your K Activity Sheet, follow the steps below to.

The starting point for this section is:
Financial Management ➔ Caseload ➔ Priority Freezing

1. Enter an end date 3 months from today under "End Date" for the Priority 6 category that was frozen earlier.
2. Save and exit.

N Notes:

Chapter 10: Vendor Management
Section 2: Farm Direct Nutrition Program (Farmers' Market)
Lesson: Using the Farmers' Market Administration Screen

Objectives:

Upon completion of this lesson the user will be able to:
- set the agency's maximum family benefit;
- verify the agency's (or clinic's) receipt of stock from the State at the start of the Farmers' Market season;
- void unissued Farmers' Market stock; and
- transfer stock between clinics or back to the State.

Oregon Policies:

⊄ 1100 Farm Direct Nutrition Program: Local Program Responsibilities

Overview:

Use the Farmers' Market Administration screen to help get your agency ready for the season: you will verify that your agency or clinic has received the coupon stock that the State indicates on your packing list. You will then use this screen to assign stock to the appropriate clinics in order for the stock to be available to issue. Also use this screen to void unissued coupon stock (e.g. stock that arrives damaged from the printer or stock that is stolen), and to set the agency's maximum family benefit. ("Family maximum" is the maximum dollar amount in Farmers' Market coupons that can be issued to a family with Farmers' Market-eligible members).

Instruction:

Using the Farmers' Market Administration Screen

The starting point for this section is:

Vendor Management ÷ Farmers' Market ÷ Administration

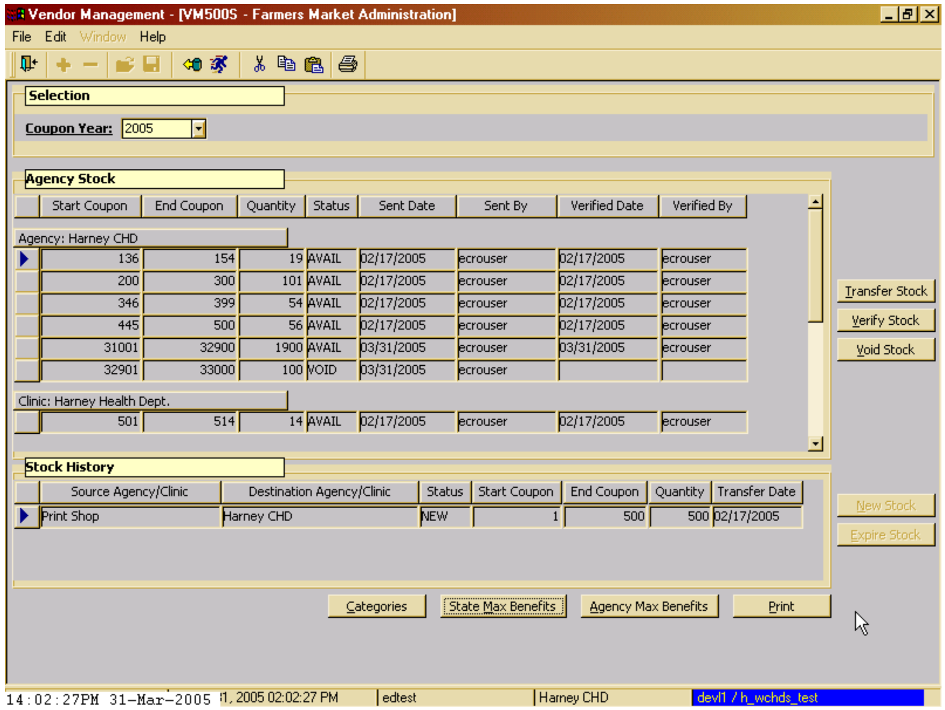


Figure 1: "FM Administration" Screen

The window is divided into three sections:

- The top part of the window is titled **"Selection."** The Coupon Year defaults to the current year, but you could also choose from previous years if you want to see stock history from any particular year. For example, you may want to see how many coupons a certain clinic was allocated last year.
- The middle part of the window is titled **"Agency Stock"** and displays the location and status of the entire stock range assigned to a local agency. TWIST will display a row for every change in stock status which will include the following information:
  - **"Start Coupon"**: The first number of the listed stock range.
  - **"End Coupon"**: The last number of the listed stock range.
  - **"Quantity"**: The amount of stock in the listed range.
  - **"Status"**: The status of the listed stock range.
  - **"Transfer Date"**: The date the listed stock range was transferred from the originating location to the agency/clinic listed.

    - **"Transferred By"**: The staff ID of the person who completed the transfer.
    - **"Verified Date"**: The date the listed stock range was verified as received by the agency/clinic listed.
    - **"Verified By"**: The staff ID of the person who completed the receipt verification.
- The bottom part of the window is titled **"Stock History"** and provides additional detail for any row selected in **"Agency Stock."** TWIST displays, in descending chronological order, the original distribution of the stock and stock that has been transferred to or voided at that particular location.
    - **"Source Agency/Clinic"**: The originating location of the listed stock range.
    - **"Destination Agency/Clinic"**: The ending location of the listed stock range.
    - **"Status"**: The status of the listed stock range.
    - **"Start Coupon"**: The first number of the listed stock range.
    - **"End Coupon"**: The last number of the listed stock range.
    - **"Quantity"**: The amount of stock in the range listed.
    - **"Transfer Date"**: The date the stock was transferred from the Source Agency/Clinic to the Destination Agency/Clinic.

(See Job Aid on "Farmers' Market Administration - Stock Statuses" for more information.

+ NOTE: **"Categories," "State Max Benefits," "Transfer Stock," "Verify Stock"** and **"Void Stock"** will be covered later in the lesson.

+ NOTE: **"New Stock"** and **"Expired Stock"** are State-only functions, so these buttons will be grayed-out to local agency users.

Verify Receipt of Stock from the State

The State will mail the assigned coupon stock and corresponding coupon registers either to the local agency or the clinic(s) specified by the local agency, and the State will record the ranges and their destination in TWIST.

The local agency and/or clinic(s) must then verify the receipt of the coupon stock physically and in TWIST.

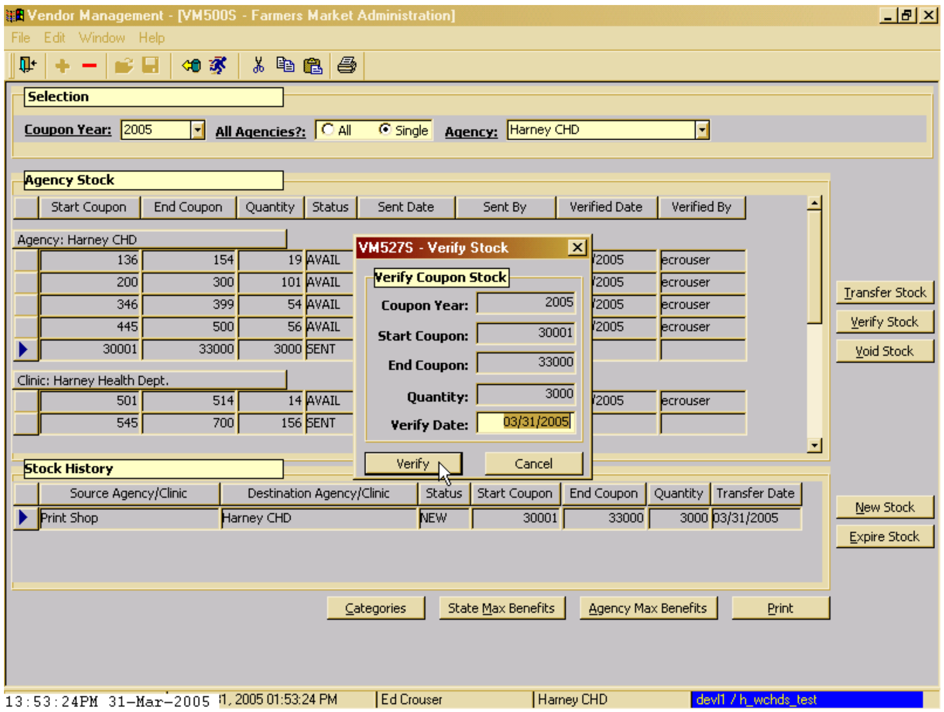


Figure 2: "Verify Stock" Pop-up

1. **Click on the row for which you are verifying receipt of stock under "Agency Stock."**

2. **Click on "Verify Stock" button.**

    - **"Verify Date"** defaults to today's date.
    - It is important before you complete the screen to physically verify that you have the stock indicated on the screen. If you do not for whatever reason, please contact the State Farmers' Market Coordinator before proceeding.

3. **Click on "Verify."**

Under **"Agency Stock"** for that particular range of stock TWIST captures the staff's initials and changes the status of that range of stock from **"Sent"** to **"Available."**

- **"Verified Date"** fields are updated for the stock range.
- **"Verified By"** is auto-filled with the staff ID.
- **"Status"** is updated from **"Sent"** to **"Available."** (see Job Aid)

Void Stock

Use the Farmers' Market Administration Screen to void stock that has not yet been issued to clients.

Example: Of 3,000 coupons that the State sent to the local agency, one hundred coupons numbered 32901-33000 arrive damaged.

1. **Click on "Void Stock" button.**

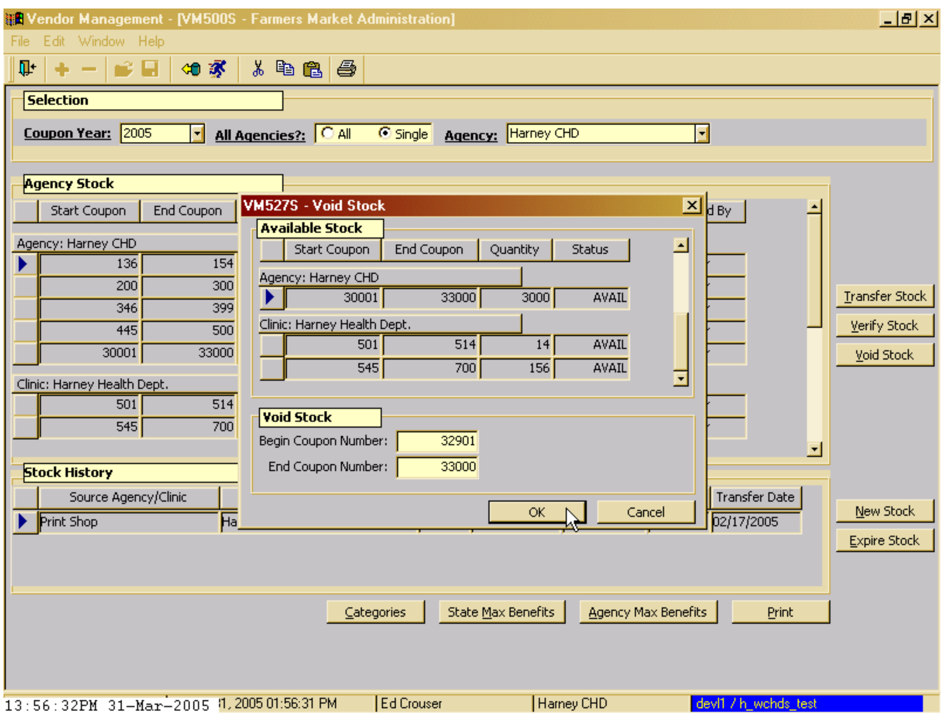


Figure 3: "Void Stock" Pop-up

- The **"Void Stock"** pop-up will display all rows under **"Available Stock."**

2. **Click on the row that includes the range of stock you need to void under "Agency Stock."**

3. **Enter Begin Coupon Number and End Coupon Number of the stock you need to void.**

4. **Click "OK."**

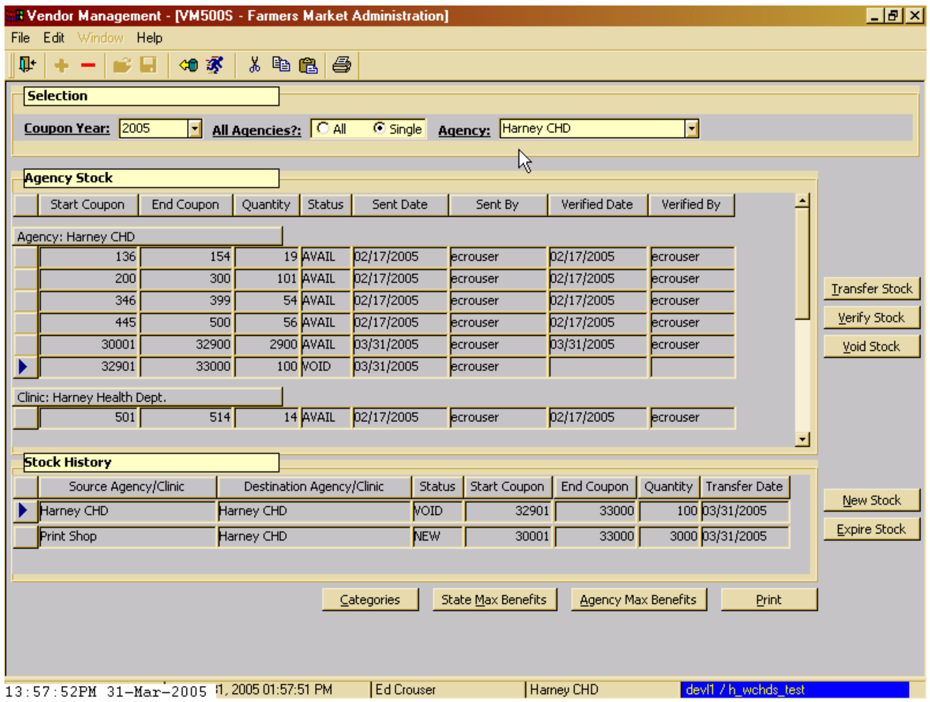


Figure 4: "FM Administration" Screen after Void

- Under **"Agency Stock"** the status of the stock is updated to indicate the voided stock.

Transfer Stock

Local agencies MUST transfer (i.e. distribute) stock to the clinic level in order for the stock to be available to issue, and will use the "Transfer Stock" function to do so. The clinic(s) must then verify their receipt of the stock from the local agency. Transfer of stock to another local agency is NOT an option. Local agencies also have the option to return unissued coupon stock back to the State for re-distribution, and will also use the "Transfer Stock" function to do so. See policy 8.0, "Unissued Coupons" in ⊄ 1100 Farm Direct Nutrition Program: Local Program Responsibilities.

Example: Transfer of 1,000 coupons from main agency to another clinic

within the agency.

1. **Click on “Transfer Stock” button.**

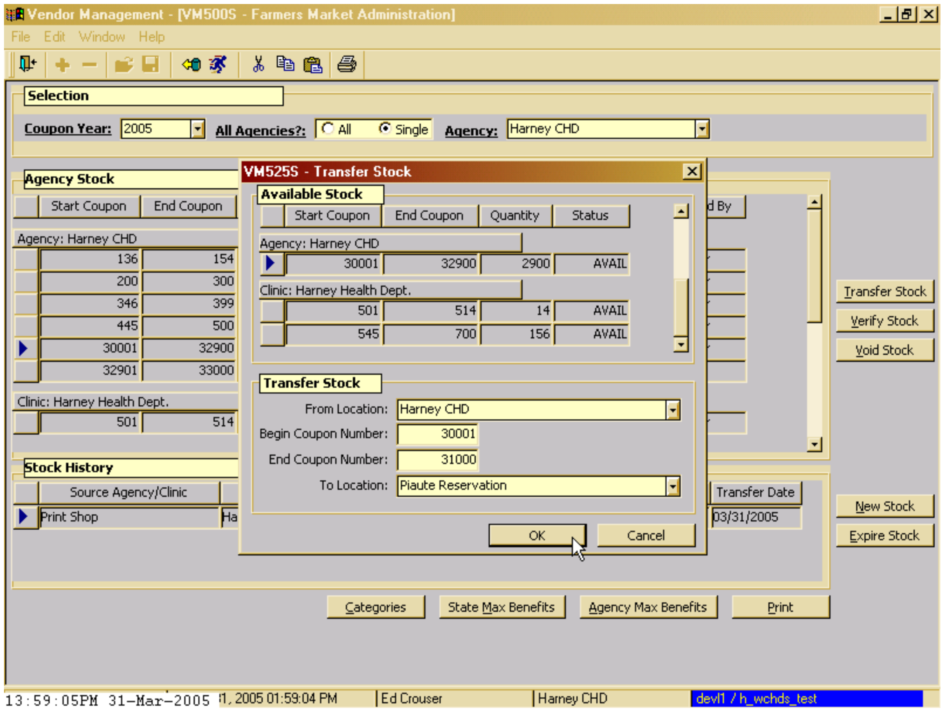


Figure 5: “Transfer Stock” Pop-up

2. **Click on the row that includes the range of stock you need to transfer under “Agency Stock.”**

3. **Select originating location of the stock from “From Location” drop-down menu.**

4. **Enter Begin Coupon Number and End Coupon Number of the range you need to transfer.**

5. **Select destination of the stock from “To Location” drop-down menu.**

6. **Click “OK.”**

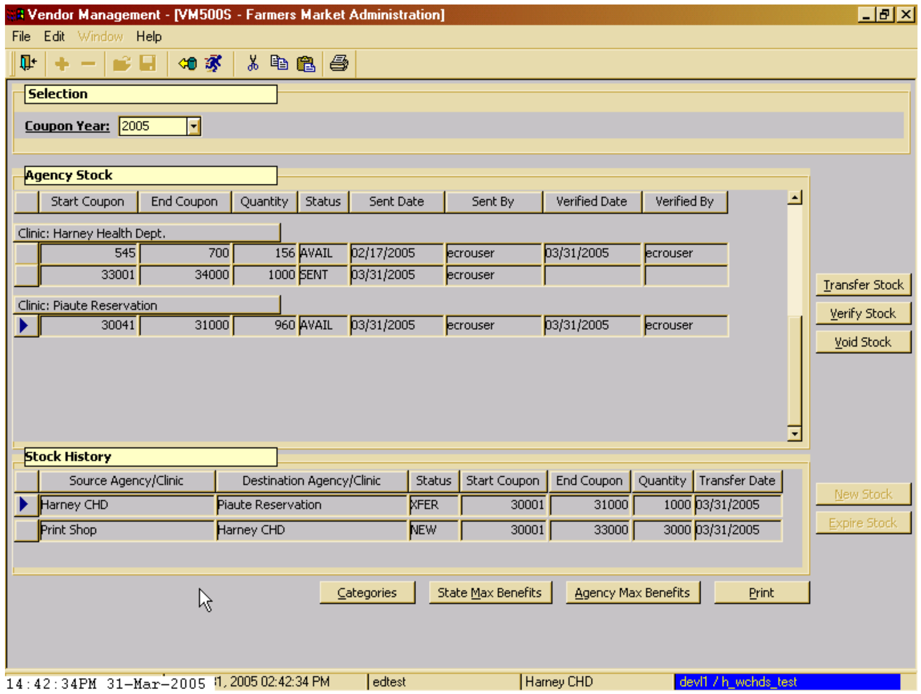


Figure 6: "FM Administration" Screen After Transfer

- Clinics that receive transferred stock must remember to verify the stock in order for the stock to be available to issue.
- Clinics will not be able to issue coupons from stock that is outside of their assigned range. If they try to do so, TWIST will generate a message that states "Coupon Outside of Clinic Range." See Farmers' Market Issuance Lesson for more detailed information on how to issue coupons.

Set Agency Maximum Family Benefit

The starting point for this section is:

Vendor Management ÷ Farmers' Market ÷ Administration

Local agencies are required to enter into TWIST an agency maximum family benefit, which is the maximum dollar amount in Farm Direct coupons that can be issued to a family with FDNP-eligible members and is applied to all families. You have the option to set your agency's own maximum family benefit as long as it does not exceed the maximum family benefit set by the State. Otherwise, you must enter the max benefit set by the State. The maximum is good for the current year only.

1. **Click on "State Max Benefits" button to view the State maximum family benefit.**

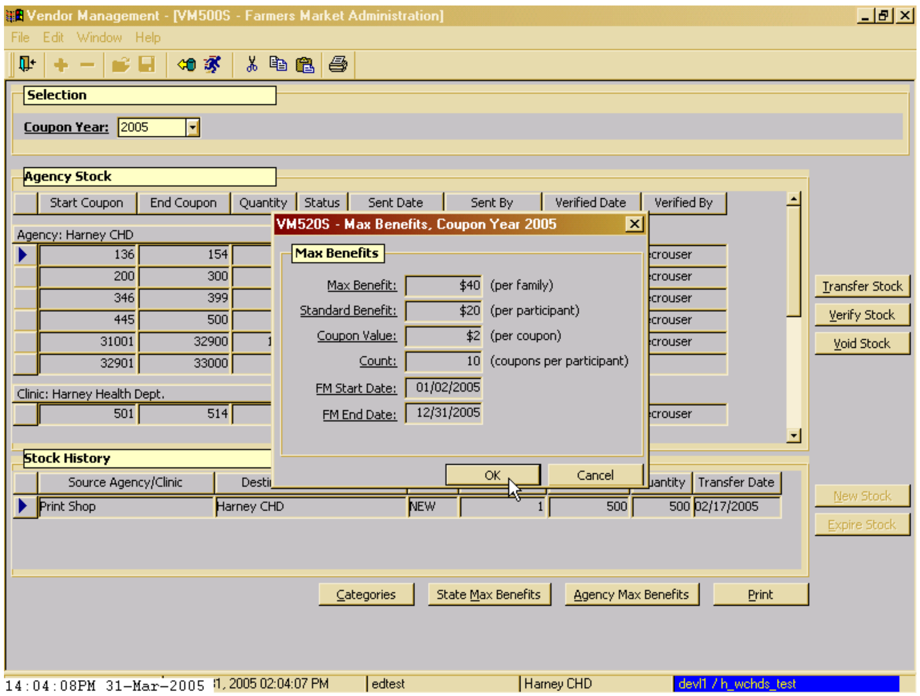


Figure 7: State "Max Benefits" Pop-up

- **"Max Benefit"** is the statewide maximum dollar amount in Farmers' Market coupons that can be issued to a family with Farmers' Market-eligible members.
- **"Standard Benefit"** is the exact dollar amount in Farmers' Market coupons that can be issued to each participant.
- **"Coupon Value"** is the value of each Farmers' Market coupon.
- **"Count"** is the exact number of coupons that will be issued to each participant.
- **"FM Start Date"** for the current Farmers' Market year.
- **"FM End Date"** for the current Farmers' Market year.

2. **Click "OK."**

3. **Click on "Agency Max Benefits" button.**

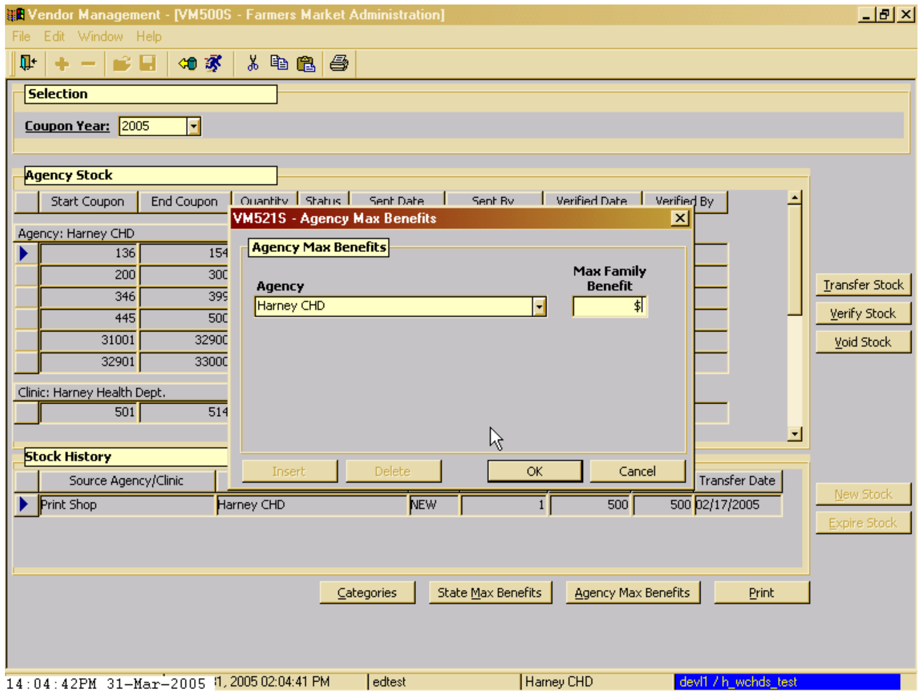


Figure 8: "Agency Max Benefits" Pop-up

4. **Enter your Agency's "Max Family Benefit" in increments that match the standard individual benefit amount (e.g. $20, $40, etc.)**

5. **Click "OK."**

Tips and Shortcuts:

- Use the **Print** button to generate a report that lists the **"Agency Stock"** information for the entire agency.
- Click on the **Categories** button to view the WIC categories that the State WIC office selected to be eligible to receive Farmers' Market coupons.

Notes:

Chapter 10: Vendor Management
Section 2: Farm Direct Nutrition Program (Farmers' Market)
Lesson: Answering Questions

Objectives:

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

- Interpret the Farmers' Market Issuance screen to check a client's eligibility;
- Interpret the Family Issuance Details pop-up and answer questions related to a specific client and his/her family;
- Interpret the Farmers' Market Look-up screen and answer questions related to issued coupons.

Oregon Policies:

⊄ 1100 Farm Direct Nutrition Program: Local Program Responsibilities

Overview:

Clients will have questions regarding their participation in the Farm Direct Nutrition Program that can range from whether or not they are eligible to participate to whether or not their family can receive more coupons. This lesson describes the different screens that can help answer clients' questions.

Instruction:

Checking a Client's Eligibility

The starting point for this section is:

Client Processes ÷ Farmers' Market ÷ Issuance

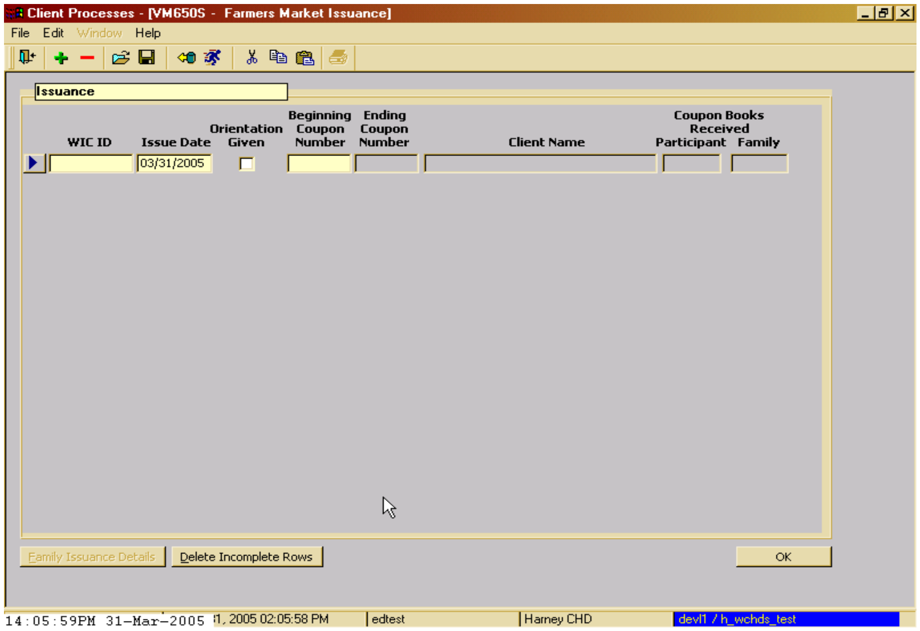


Figure 1: "Farmers' Market Issuance" Screen

1. **Enter the client's WIC ID number, or retrieve the client via Client Master.**

2. **Tab from the WIC ID field.**
   If the client is ineligible you will receive an ineligibility message.

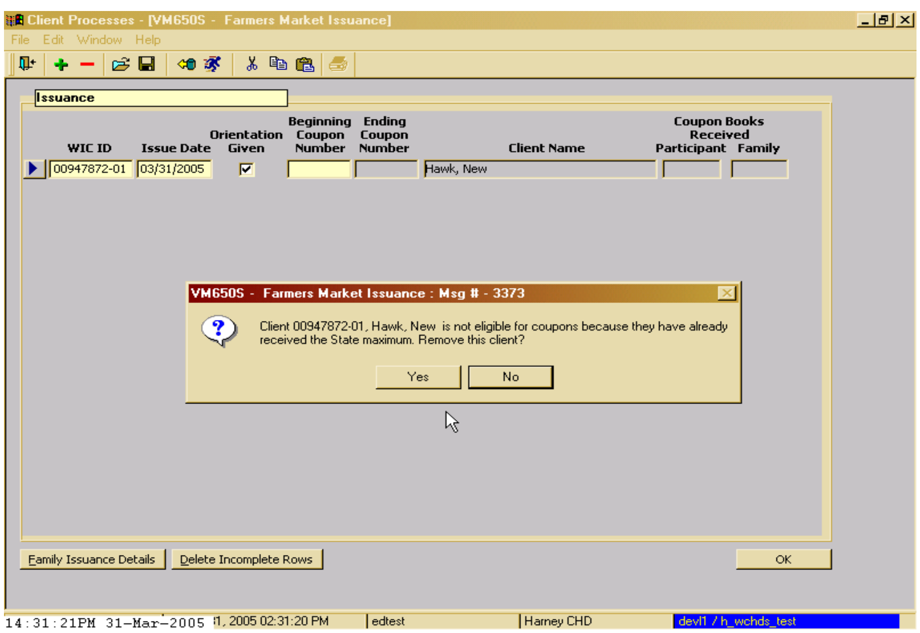


Figure 2: "Farmers' Market Issuance" Ineligibility Message

Using the Family Issuance Details Pop-Up

The Family Issuance Pop-up provides coupon issuance details about a specific client's family.

1. **Access the Farmers' Market Issuance screen via Group Education Classes, Enrollment & Intake, or Certification.**

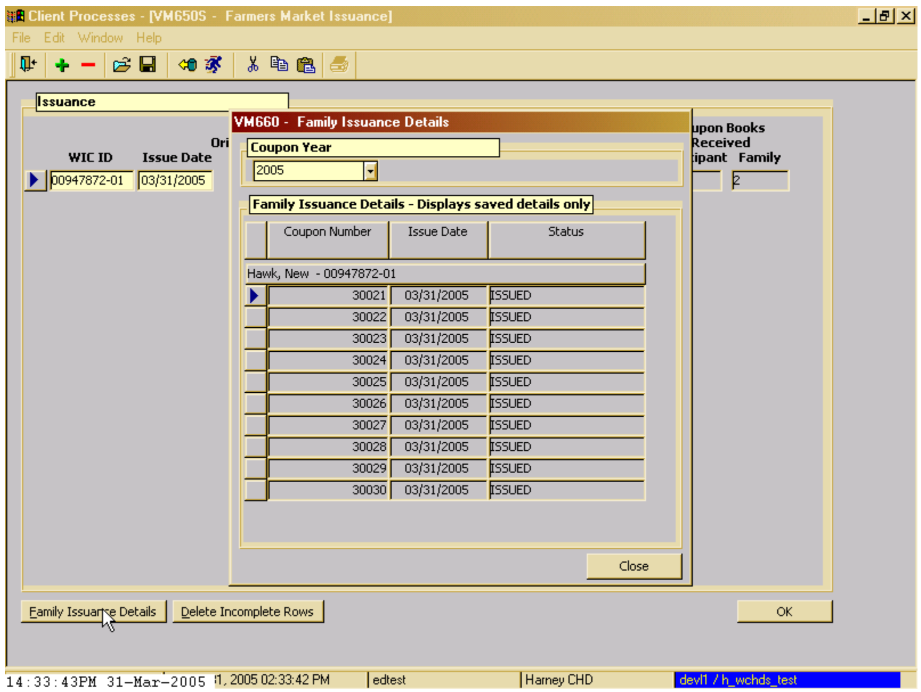


Figure 3: "Family Issuance Details" Pop-Up

2. **Retrieve a client by entering their WIC ID number or via Client Master (if the Farmers' Market Issuance screen is not already populated).**

3. **Select the row showing the client in question.**

4. **Click on "Family Issuance Details" button.**

   - The pop-up displays in numerical order the coupons issued to every member of the client's family, by family member, as well as the status of the coupon.
   - The pop-up defaults to information for the current year but you may select from previous years if needed.

- The pop-up displays only previously saved data. The **"Coupon Books Received"** columns for a specific client on the Farmers' Market Issuance Screen may not match the information captured in the Family Issuance Details pop-up since those columns also reflect what you are about to issue.

5. **Click on "Close."**

Using the View Client Status Screen

The starting point for this section is:

Client Processes ÷ Lookup ÷ View Client Status

You can also access the **"Family Issuance Details"** screen via the **"View Client Status"** screen.

1. **Retrieve the client in question.**

2. **Click on "Farmers' Market" button.**

   - The **"Family Issuance Details"** pop-up is displayed.

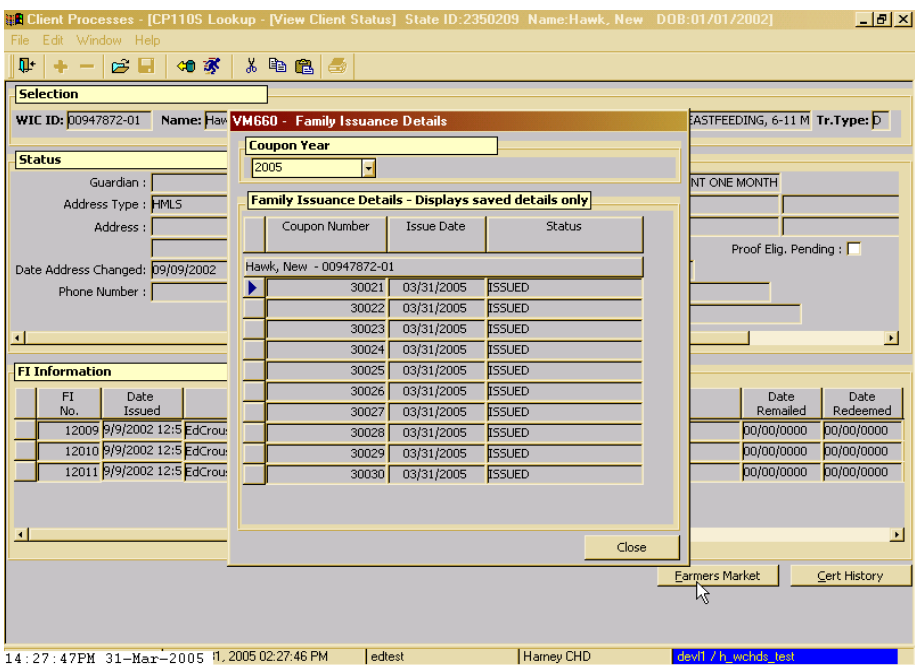


Figure 4: "Family Issuance Details" Pop-Up from View Client Status Screen

3. **Click on "Close."**

Using the Farmers' Market Look-Up Screen

The starting point for this section is:

Vendor Management ÷ Farmers' Market ÷ Look-up

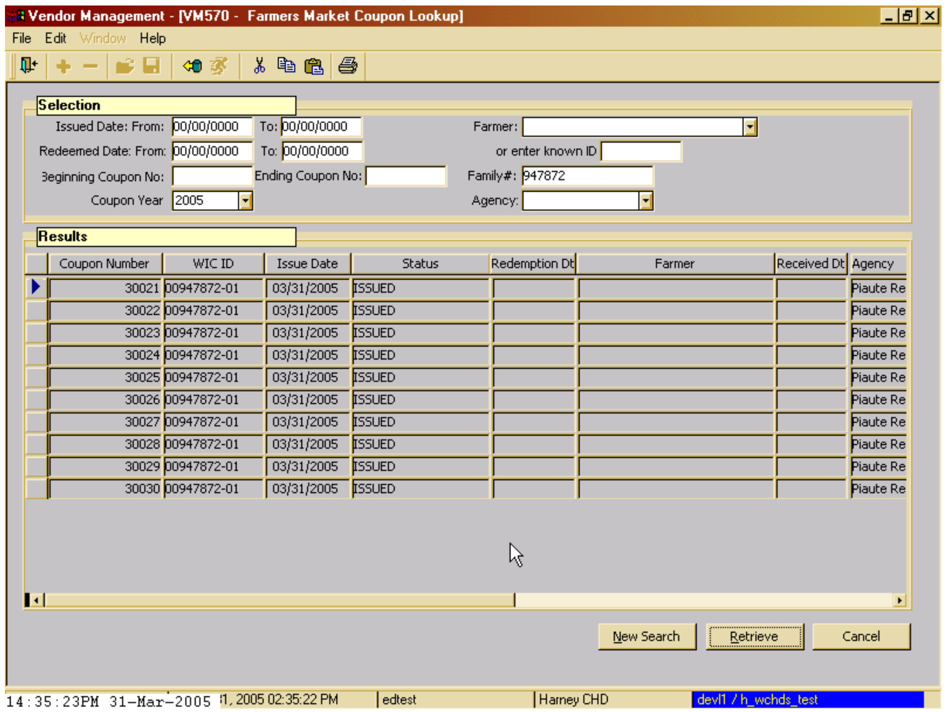


Figure 5: "Farmers' Market Coupon" Look-up Screen

The window is divided into two sections:

- The top part of the window is titled **"Selection"** and offers numerous criteria to define your search:
  - **"Issued Date From"** and **"To"** for the coupon(s) in question
  - **"Redeemed Date From"** and **"To"** for the coupon(s) in question
  - **"Beginning"** and **"Ending Coupon No."** for the coupon(s) in question
  - **"Coupon Year"** (defaults to current year but you may choose previous years if needed.)
  - **"Farmer"** who redeemed the coupon(s) in question
  - **"Family" #** of the client who was issued the coupons in question (include leading zeroes but do not enter two-digit participant number)
  - **"Agency"** that issued the coupon(s) in question

- The bottom part of the window is titled **"Results"** and provides the following information:
  - **"Coupon Number"** (the serial number of the coupon)
  - **"WIC ID"** of the client who was issued the coupon
  - **"Issue Date"** of the coupon to the client
  - **"Status"** of the coupon
  - **"Redemption Date"** (the bank paid date)
  - **"Farmer"** who accepted the coupon
  - **"Received Date"** (the TWIST process date which is usually the same as the Redemption Date)
  - **"Agency"** that issued the coupon
  - **"Category"** of the client when the coupon was issued

1. **Enter selection criteria in the "Selection" section.**

2. **Click "Retrieve."**

   This screen will display information related to coupons that have already been issued.

+ NOTE: The **"Farmers' Market Look-up"** screen is not available on the laptop.

N *Notes:*

Chapter 10: Vendor Management
Section 1: Farm Direct Nutrition Program (Farmers' Market)
Lesson: Using the Coupon Maintenance Screen

Objectives:

Upon completion of this lesson the user will be able to:
- change issuance data for a specific range of coupons;
- void coupons that have already been issued; and
- enter issuance data for coupons that have already been redeemed.

Oregon Policies:

♦ 1100 Farm Direct Nutrition Program: Local Program Responsibilities

Overview:

There will be occasions when you must correct or add data related to coupons that have already been issued to a client. Use the Coupon Maintenance screen to change specific issuance data, void issued coupons and enter issuance data for coupons that have already been redeemed (i.e. resolve "missing issuances").

Instruction:

Using the Coupon Maintenance Screen

The starting point for this lesson is:

Vendor Management ⇨ Farmers' Market ⇨ Coupon Maintenance

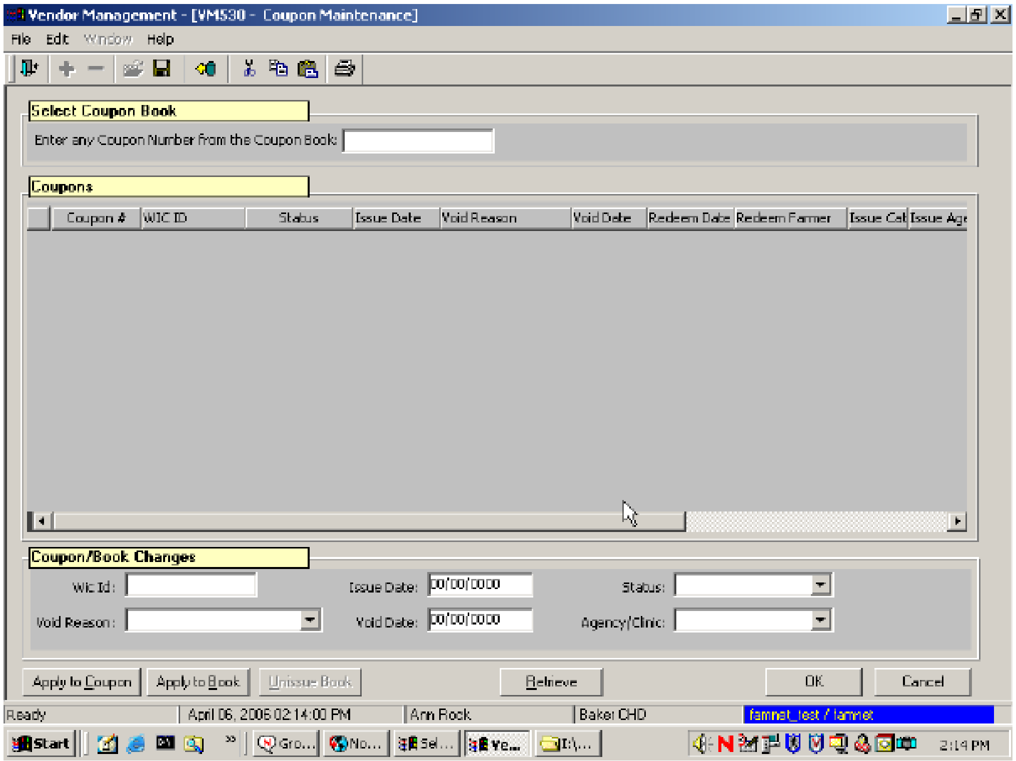


Figure 1: "Coupon Maintenance" Screen

The window is divided into three sections:

- The top part of the window is titled "**Select Coupon Book.**" TWIST will display data related to the range of ten coupons that includes the coupon number entered by the user in this section.
- The middle part of the window is titled "**Coupons**" and displays issuance and redemption data related to the range of ten coupons that includes the coupon number entered by the user in the "**Select Coupon Book**" section:
  - "**Coupon #**": The number of the coupon(s).
  - "**WIC ID**": of the client who was issued the coupons.
  - "**Status**": The status of each coupon.
  - "**Issue Date**": The date the coupon was issued.
  - "**Void Reason**": The reason the coupon was voided.
  - "**Void Date**": The date the coupon was voided.
  - "**Redeem Date**": The date the bank cashed the coupon.
  - "**Redeem Farmer**": Name of the farmer who accepted the coupon.
  - "**Issue Cat**": The category of the client when the coupon was issued.
  - "**Issue Agency**": The name of the agency that issued the coupon.
  - "**Not Eligible Reason**": The reason the client was not eligible to receive coupons.

- The bottom part of the window is titled "**Coupon/Book Changes**" and features the following update options that the user may apply to any of the coupons listed in the "**Coupons**" section:
  - "**WIC ID**"
  - "**Issue Date**"
  - "**Status**"
  - "**Void Reason**"
  - "**Void Date**"
  - "**Agency/Clinic**" that issued the coupon.

♫ NOTE: "**Apply to Coupon**" and "**Apply to Book**" will be covered later in the lesson.

♫ NOTE: "**Unissue Book**" is a State-only function, so this button will be unavailable to local agency users. Contact Application Support if you accidentally enter issuance data for a book of Farmers' Market coupons that you have not yet actually issued.

Changing Issuance Data

Use the Coupon Maintenance screen to correct the WIC ID number of the client who received the coupons, to change the issue date or status of the coupons, or to change the agency or clinic that actually issued the coupons.

1. **Enter a coupon number in the "Select Coupon Book" field and click "Retrieve."**

   - TWIST will populate the "**Coupons**" section with issuance and redemption data (if redeemed) related to all ten coupons in the range that includes the coupon number entered in the "**Select Coupon Book**" section.

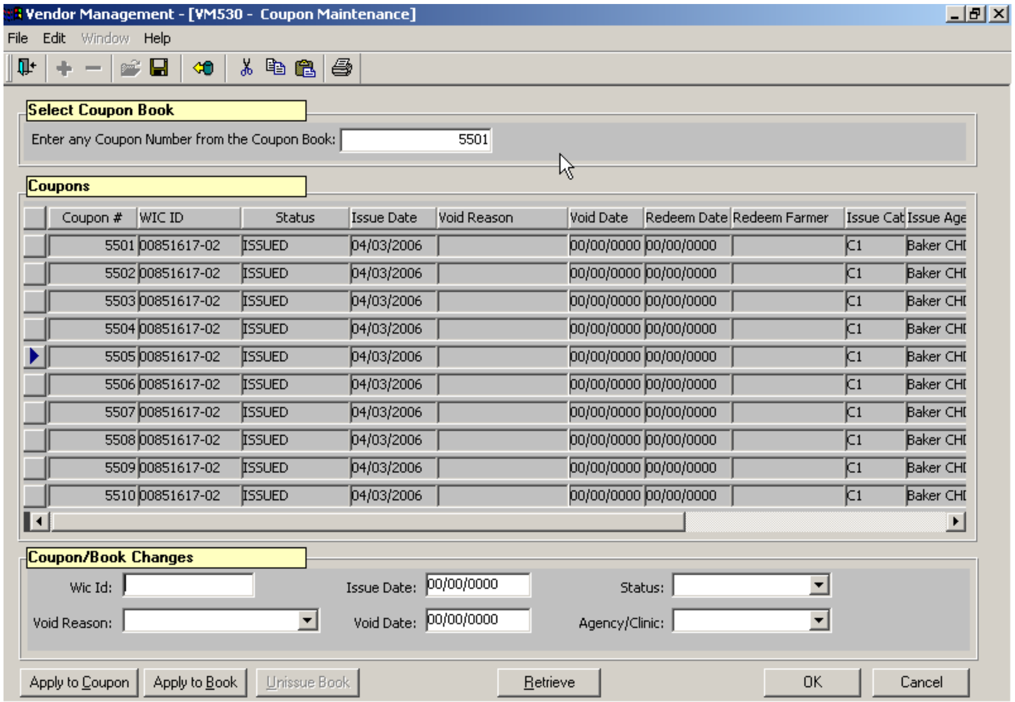


Figure 2: Completed "Coupon Maintenance" Screen

2. **Enter the WIC ID, Issue Date, Coupon Status or agency/clinic you want to change in the "Coupon/Book" Changes section.**

♫ NOTE: The status of a coupon cannot be changed to "Redeemed."

♫ NOTE: The "**Void Reason**" and "**Void Date**" fields will be covered later in the lesson.

3. **Click on "Apply to Book" to apply changes to <u>all</u> the coupons in the range.**

   - Changes to issuance data <u>must</u> apply to <u>all</u> coupons in a range (or book) because coupons are issued on a per-book basis.
   - The appropriate fields are updated in the "Coupons" section.

4. **Click "OK."**

Voiding Issued Coupons

Use the Coupon Maintenance screen to void checks that have already been issued to a client.

1. **Enter a coupon number in the "Select Coupon Book" section and click "Retrieve."**

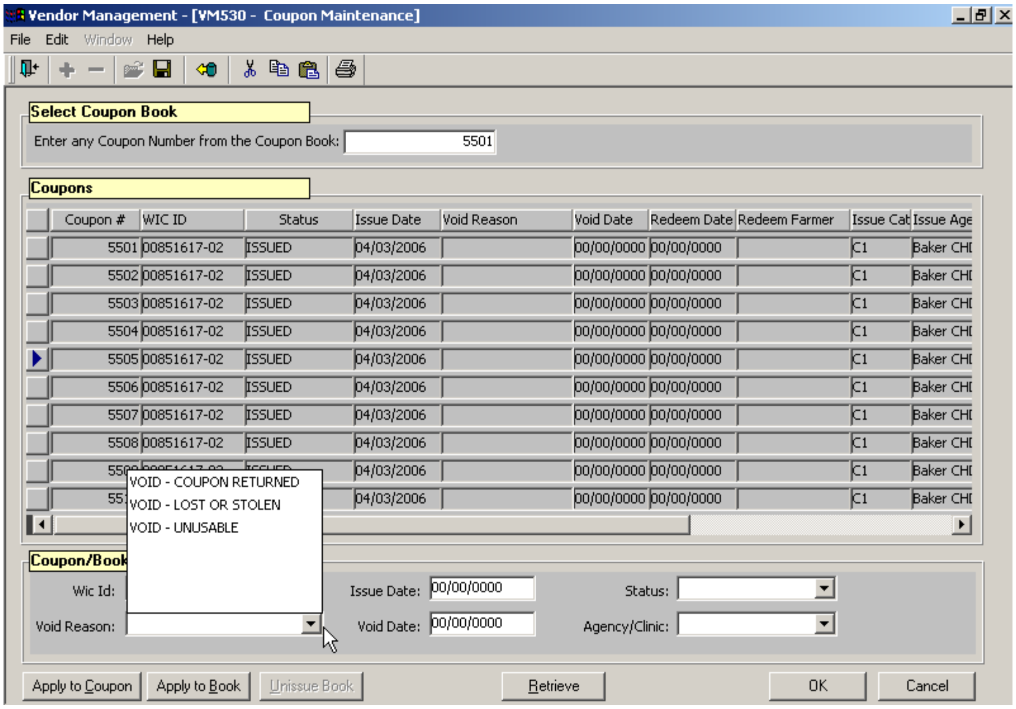


Figure 3: Voiding Coupons in "Coupon Maintenance" Screen

2. **Click on the "Void Reason" field in the "Coupon/Book" Changes section.**

   - Select "VOID – UNUSABLE" if a client returns a coupon that is damaged. (You may not replace the coupon.)
   - Select "VOID – COUPON RETURNED" if a client returns a coupon for any reason other than because it is damaged. (You may not reissue the coupon.)
   - Select "VOID – LOST OR STOLEN" if a client reports an issued coupon as lost or stolen. (You may not reissue the coupon if it is returned.)

3. **Fill in the "Void Date" field of the "Coupon/Book Changes section."**

   - TWIST will prompt you to enter a date if you have not already done so.

4. **Click on "Apply to Coupon" if you want the change(s) to apply to the coupon highlighted by the row indicator, or click on "Apply to Book" if you want the change(s) to apply to all the coupons in the range.**

- If the changes do not apply to the entire book, you will need to repeat this step for every coupon that needs changes.
- The appropriate fields are updated in the "Coupons" section.
- The status for voided Farmers' Market coupons will be displayed as "VOIDED" everywhere in the system, except for redeemed coupons that you void in this screen as lost or stolen, which will continue to show the status of "REDEEMED."

♫ NOTE: Use the "Apply to Coupon" function only when voiding issued coupons.

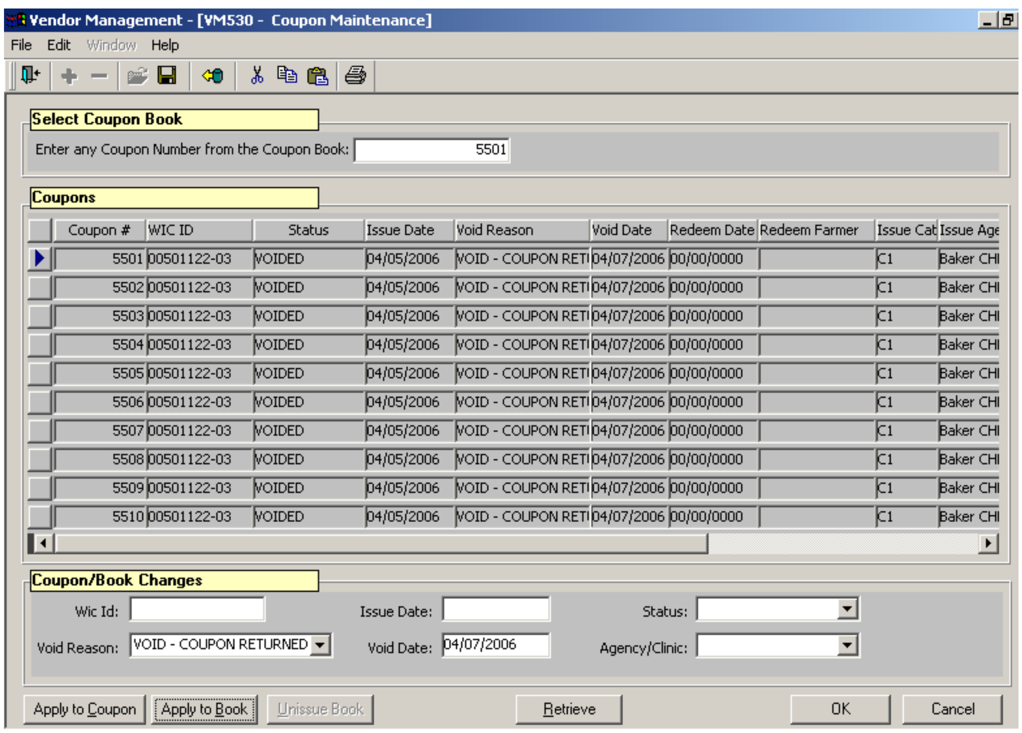


Figure 4: "Coupon Maintenance" Screen after Void

5. **Click "OK."**

Entering Issuance Data for Already-Redeemed Coupons

Sometimes coupons are processed by the banking system as "redeemed" before issuance data can be entered in TWIST. The user will learn of this when attempting to enter issuance data for these coupons in the Farmers' Market Issuance screen. TWIST will prompt the user with the following message: ***"This***

range includes redeemed coupons. Complete all other issuances and proceed to the 'Coupon Maintenance' screen." When done entering any remaining issuances it will then be necessary for local staff to exit the FM Issuance screen and go to the Coupon Maintenance screen to correct coupons with missing issuance data.

Example: User attempts to enter issuance data for coupon range 5631-5640 but receives TWIST message that the range includes redeemed coupons.

The starting point for this section is:

Vendor Management ⇨ Farmers' Market ⇨ Coupon Maintenance

1. **Enter a coupon number from the range in "Select Coupon Book" section and click "Retrieve."**

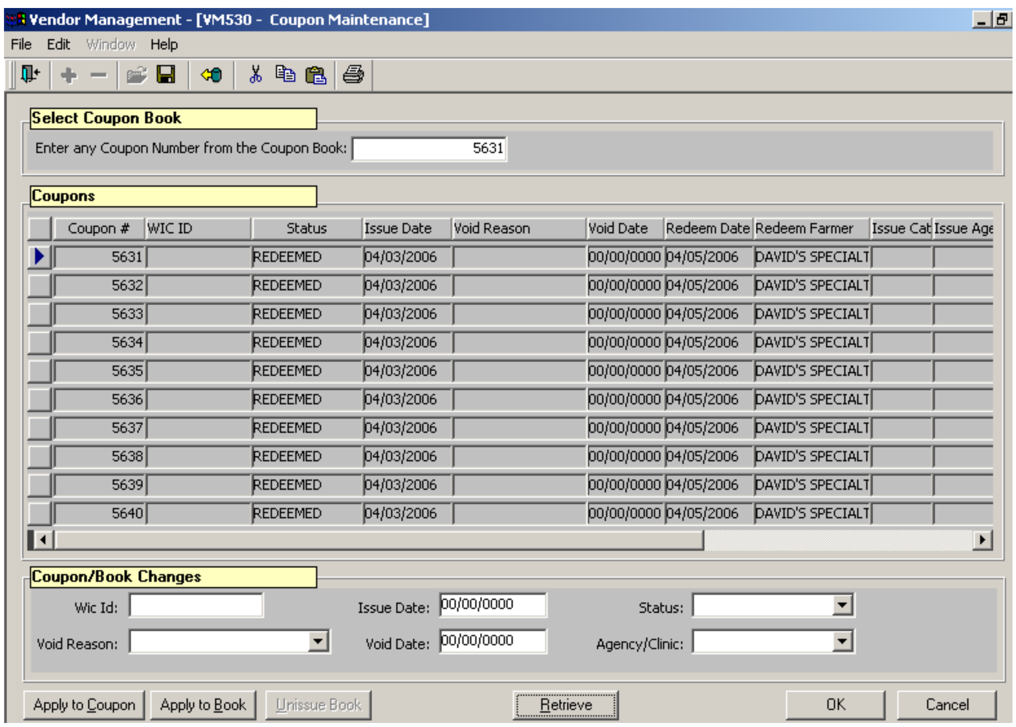


Figure 5: "Coupon Maintenance" Screen Missing Issuance Data

2. **Enter the "WIC ID," "Issue Date" and "Agency/Clinic" in the "Coupon/Book" Changes section.**

♫ NOTE: Once it is "Redeemed" the user cannot change the status of a coupon.

3. **Click "Apply to Book" to apply entries to <u>all</u> the coupons in the range.**

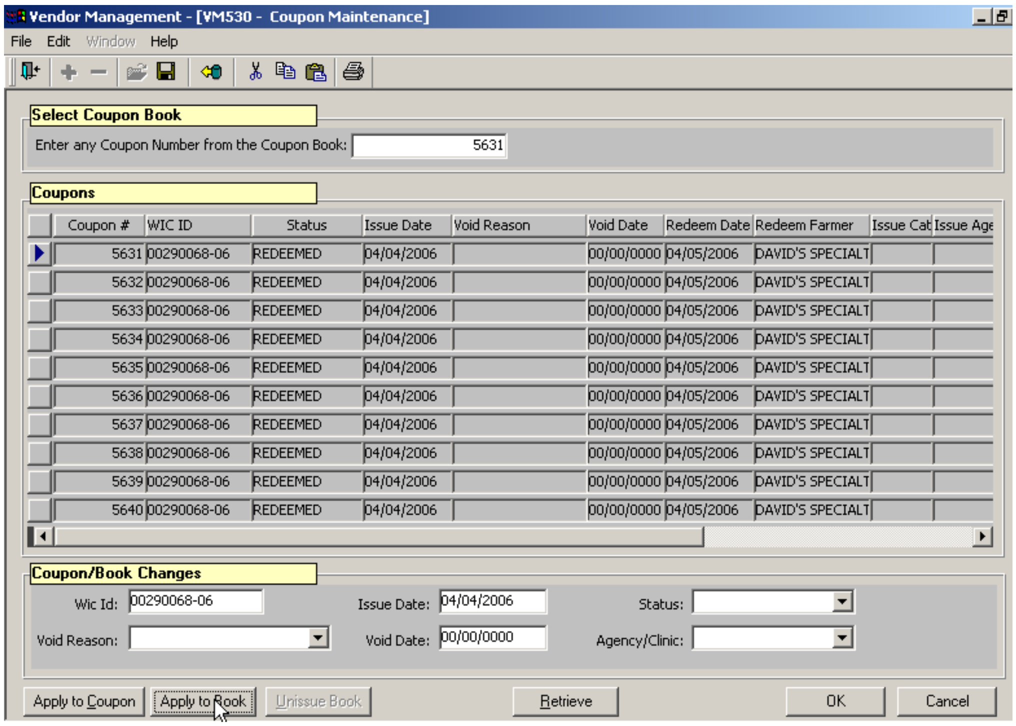


Figure 6: "Coupon Maintenance" screen with added issuance data

- Changes to issuance data <u>must</u> apply to <u>all</u> coupons in a range (or book) because coupons are issued on a per-book basis.
- The appropriate fields are updated in the "Coupons" section.

4. **Click "OK."**

✂ *Tips and Shortcuts:*

- When exiting the screen through the "blue door" icon TWIST will prompt you with a "Do you want to save?" message.

✍ *Notes:*