

## Security Roles Related to Peer Counseling

Security roles are designed to allow staff to perform the functions that are related to their role in WIC, while protecting the program and participants from potential abuse. The security roles for peer counselors and for peer counselor coordinators have been updated to reflect the duties they are now expected to perform.



Peer counselors need to be able to view a participant's record, track required contacts, schedule appointments (groups) and document what was discussed at contacts. Their security role has been designed with those duties in mind. Peer counselor coordinators need the BFPC role and also need to be able to assign a peer counselor to a participant and to run certain reports. A full listing of the security for these 2 roles follows. Please ensure that the WIC Coordinator has assigned the appropriate roles to peer counselors.

### Other security roles

In order to be effective, security roles need to be assigned correctly. For instance, the "WIC Coordinator" security role allows the coordinator to access all local agency functions, which means that is the only security role they should need. According to regulations (see Policy 660), only CPA's (certifiers) may determine risks and assign food packages. The roles of "Certifier" and "Clerk" allow the appropriate staff to perform those functions or to print vouchers. These roles should not be assigned to a peer counselor. The person setting up and entering groups in the appointment scheduler will need the "WIC Appointment Scheduler LA". This role requires in depth knowledge of the appointment scheduler and should only be assigned to staff with appropriate training. Please have any inappropriate roles removed from peer counselors who are not assigned or trained to perform them.

### WIC Breastfeeding Peer Counselor Security Roles in TWIST

The following list describes which functions/screens each BFPC role has access to. Edit = Able to change data on the screen or select criteria to run reports.

View = Able to view the content, but cannot make any changes to the data on the screen.

#### WIC BFPC Counselor

- Client Master
  - Edit - Client Master Client Maintenance
  - Edit - Client Master Search
- WIC Appointment Scheduler

- Edit - Daily Clinic Schedule
- Edit - Family Appointment Record
- Edit – Group NE
- WIC Client Process
  - Certification Women and Infants/Children
    - Edit - BF Tracking
    - View – Diet Assessment
    - View – Food Pkg, Assignment
    - View – Health History
    - View – Medical Data
    - View - NE Plan
    - Edit - Progress Notes
  - Enrollment
    - View – Income Eligibility
    - View – WIC Intake (can not edit “assign peer counselor” pop up)
    - Edit – WIC notes
  - Look-up
    - View - Family Summary Screen
    - Edit (a view only screen though) – View Client Status
  - Output
    - Edit (Run) - BF Tracking Function Call-back
    - Edit (Run) – PC Schedule for Client Contacts
    - Edit (Run) – PC Client Participation

***WIC BFPC Coordinator LA (Should be assigned in addition to the BFPC role)***

- Client Master
  - Edit - Client Master Client Maintenance
  - Edit - Client Master Search
- WIC Client Process
  - Enrollment
    - View - Income Eligibility
    - Edit - WIC Intake
    - Edit - WIC Notes
- Output
  - Edit (Run) - BF Tracking Function Call-back
  - Edit (Run) - PC Caseload Summary
  - Edit (Run) – PC Client Participation
  - Edit (Run) – PC Schedule for Client Contacts