

Clerical TWIST Training Workbook

Welcome!

- Training is from 8:00 a.m. to 5:00 p.m. with an hour for lunch.

Agenda

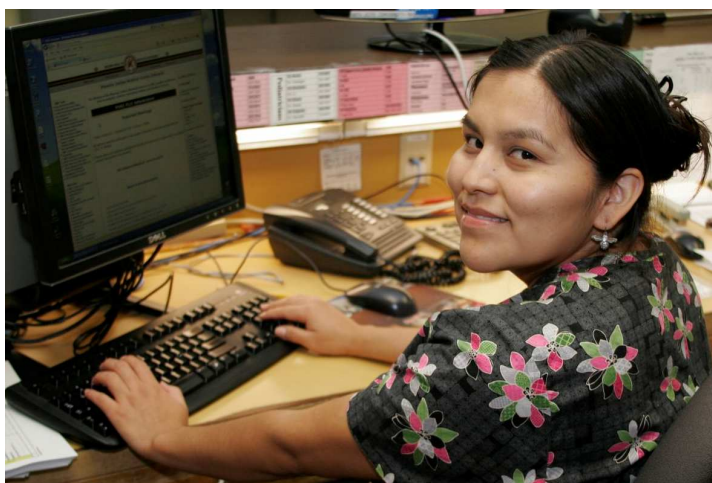
Day 1

Activity 1	Getting started <ul style="list-style-type: none">○ Welcome and introductions○ Overview of WIC○ Log into Citrix and TWIST Practice○ TWIST security
Activity 2	Applicant prescreening <ul style="list-style-type: none">○ Client Search and Client Demographics○ Income guidelines
Activity 3	New enrollment of a pregnant woman <ul style="list-style-type: none">○ Enrollment screen○ Issuing eWIC cards on the Family Cardholder Screen (FCS)○ Rights and Responsibilities, Participant Signature forms
Activity 4	Recertification and enrolling an infant <ul style="list-style-type: none">○ Transaction types○ Selecting the correct transaction type○ Recert basics○ Immunization forecast○ Options for postpartum moms
Activity 5	Reinstate and reactivate <ul style="list-style-type: none">○ What is the difference?○ Making cardholder changes on the FCS
Activity 6	Food package assignment and benefit issuance <ul style="list-style-type: none">○ Understanding food packages and the Food Package Assignment Screen○ Medical Documentation Forms○ Issuing benefits on the Family Summary Screen (FSS)○ Printing a Benefits List and checking your balance○ Setting a PIN○ Providing shopper education

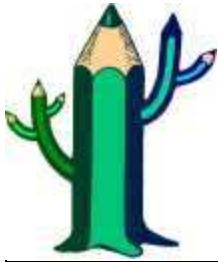
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Day 2

Activity 7	Appointment Scheduling – Family Appointment Record and Daily Clinic Schedule <ul style="list-style-type: none">○ Making individual appointments○ Rescheduling or canceling appointments○ Scheduling into a group NE appointment○ Printing appointment notices○ Documenting appointment attendance○ Options for missed NE
Activity 8	Food Package changes, formula exchange, formula warehouse <ul style="list-style-type: none">○ Modifying foods when benefits have been issued or spent○ Formula replacement or exchange○ Issuing formula from the Formula Warehouse
Activity 9	Foster families and custody changes
Activity 10	Terminations and transfers <ul style="list-style-type: none">○ Benefit removal
Activity 11	What's left? <ul style="list-style-type: none">○ Entering a complaint○ What can you do over the phone?○ Issuing benefits in the last 5 days of the month
Wrap Up	Resources and Next Steps



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Learning Log

While you are going through the training please record your thoughts the moment they come to you. Be sure to write down any questions you might need answered about how things are done in your agency.

[illegible]

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Let's Talk WIC

WIC's Goal:

WIC Serves:

WIC Does:

To be on WIC:

Certification Includes:

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Activity 1 - Getting Started

Let's get logged into the computer and the TWIST Practice Database.

➔ **Practice Information**

➔ **Log into the computer using the login information below**



Login	.\publichealth
Password (case-sensitive)	Public-Health-01
Selection	This computer

➔ **Open Citrix and login (Use icon or favorite on Internet Explorer)**

Login	Your P number
Password	Your normal password

➔ **Login to FamilyNet Practice**

Login	local# (#posted on desk)
Password	local# (#posted on desk)
Agency	Ford



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➤ ***Finding your participant***

- Practice Database has a set of 14 participants with the same first and last name (e.g. Samantha Seaside).
- Each participant has a different letter for their middle initial (e.g. Samantha A Seaside).

Search by Agency	Ford
Participant name	Type in the first 3 letters of the first and last name of the participant and click search
Middle initial	Type in your assigned middle initial

➤ ***Complete activities***

- Use the information from the activity sheets to enter in TWIST.

Note: You can use the Practice Database back at your agency. Just look for your agency name in the middle name field (e.g. Samantha Baker-A Seaside). On the 1st of each month the Practice Database is refreshed and all information entered the previous month is removed.

➤ ***TWIST Security***

- Lock your workstation whenever you walk away.

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Activity 2 – Applicant Prescreening

A pregnant woman calls your clinic to find out if she is eligible. You prescreen her to check her eligibility.



➔ Practice Information

➤ Client Search and Client Demographics

(Searching for a Client Already in the Database)

- From the “Applicant Prescreening” screen, search for **your own name**.
- Enter her information on the “Client Primary” screen.

Name	Use your own name
Date of Birth	Use your own birthday
Address/Phone Confidential	No
Home Address	14444 SW Terrace Drive Grants Pass, OR 97526
Contact by mail?	Yes
Contact you by phone?	Yes
Phone	(541) 773-9902 (home)
Phone Options	Voice only
WIC ANSWR	Voice
Race/Ethnicity	White/Not Hispanic
Language	English (spoken and written)
Alternate Format	No
Medicaid # and SSN	not collected in WIC

- On the “Applicant Prescreening – Income Eligibility” screen, using

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yourself as the client, enter the following information.

Calculating Income for	Family
Proof of ID	Not Available, on phone
Proof of Residency	Not Available, on phone
No. in Family	3
Unborn counted	1
New Income Date	Defaults to today
SNAP, OHP, TANF	No
Income Provider	Self
Income	\$1000/mo wages from Safeway
Proof of Income	Not Available, on phone

- On the “Applicant Prescreening – WIC Intake” screen, using yourself as the client, enter the following information.

Other Family Members on WIC?	No
WIC Clinic	Master
WIC Category	Woman, pregnant
EDD	7 months from today
Are you a migrant?	No
Contact type	phone

- Generate WIC ID and Save

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✓ **Skill Check Information**

Now you can practice prescreening a client on your own using the scenario below.

Mary [middle initial] Malheur has called your office to find out if she is eligible for WIC. Make up any additional information needed.

- Prescreen her for eligibility.
- Her address and phone number are:
 - 14320 NW Computer Court
 - Beaverton, OR 97006
 - (503) 779-9977
- She is Hispanic and writes and speaks English.
- She lives alone and currently works at a day care center and reports she earns \$550 per month. She will be applying for OHP tomorrow.
- She is pregnant and her EDD is 6 months from today. She will attend the Master clinic.
- She has not been on WIC before and has no family members on WIC.

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Activity 3 – New Enrollment of a Pregnant Woman

The pregnant woman you prescreened earlier is here for her new enrollment appointment.

↪ Practice Information

➡ WIC Enrollment

- On the “Enrollment” screen, search for and enroll the same client you prescreened earlier.

Name	Your own name
DOB	Your own birthday

- On the “Enrollment – WIC Intake” screen, using yourself as the client, verify and/or enter the following information.

Other Family on WIC?	No
Clinic	Master
WIC Category	Pregnant
Migrant?	No
Homeless?	No
Auto Scheduler, OK?	Yes
Voter Registration Offered?	Yes
Marital Status	Single
Education	High School Diploma
EDD	7 months from today
Referrals from WIC	OHP
Medical Provider	Kathie Scott, CNM, (541) 839-9930



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- › On the “Enrollment – Income Eligibility” screen, using yourself as the client, verify and/or enter the following information.

Proof of ID	Driver’s License
Proof of Residency	Utility Bill
Income Provider	Self
Income	\$1242/month from Safeway
Proof of Income	Pay stub

- › On the “Enrollment – WIC Notes” screen, using yourself as the client, enter a note and check the “Reminder” box.

➡ **Family Cardholder Screen**

- › Fastpath to the Family Cardholder Screen
- › Complete the following information for the First Cardholder:

Cardholder Name	Your name
Date of Birth	Your date of birth
Relationship	Mom
eWIC card number	<i>Enter the card number provided</i>

- › Save
- › Complete the following information for the Second Cardholder:

Cardholder Name	Carder, Jimmy
Date of Birth	07/07/1977
Relationship	Father of baby
eWIC card number	<i>Enter the card number provided</i>

- › Select copy address from first cardholder
- › Save

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✓ ***Skill Check Information***

Now you can practice enrolling a pregnant woman on your own using the scenario below.

The same **Mary [middle initial] Malheur** you prescreened earlier has come into your clinic for her enrollment appointment. Enter information for her enrollment. Assign a first cardholder and issue an eWIC card.

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Activity 4 - Recertification and Enrolling an Infant

Part of the clerical role is to select the appropriate transaction type and update the TWIST records with the “Income Eligibility,” “WIC Intake,” and “Client Primary” information for existing clients who need to be recertified or reinstated. The Lexington family is in the clinic for appointments. You will be selecting the correct transaction for each family member.



➡ Practice Information

Recertification

Scenario 1: Their child Levi is due for a recert next month, but they want to do it while they are here today. We also need to change the family address.

➡ **Client Search and Demographics**

- ▶ On the “Enrollment – WIC Intake” screen, search for and return with the client, **Levi [middle initial] Lexington**.
- ▶ On the “Client Primary” screen, update his address to:

Home Address	523 NE Forest Dr. Portland, OR 97232
Phone	(503) 222-1995 (text)
WIC ANSWR	Voice and text
Email	Lexington@gmail.com

➡ **Starting a Recertification of a Child**

- ▶ Return with your client for recertification.
- ▶ Address will cascade to other family members.
- ▶ Shorten the cert end date to the end of this month and save.
- ▶ At the “Go to FPA” pop-up, select “No.”
- ▶ Change the “Transaction Type” to recertification.
- ▶ Check the “Check If No Changes” box.

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- ▶ On the “Income Eligibility” screen, using Levi Lexington as the client, verify and/or enter the following information.

No. in Family	4
Proof of ID	WIC ID Card
Proof of Residency	Utility Bill
SNAP	Yes
OHP	Yes
TANF	No
Income Provider	Leroy Lexington - father
Income amount	\$445 wages every week
Proof of Income	Pay stub

- ▶ Click on Immunization Due button (information not available in Practice Database).
- ▶ Save and exit.



Scenario 2: Levi’s mom, Lexi, is a fully breastfeeding postpartum mom who had her baby. She needs to be recertified as a postpartum woman and have her new baby enrolled.

➡ **Recertification of Lexi, a Postpartum Woman**

- ▶ From “WIC Intake,” search for and return with the mom, **Lexi [middle initial] Lexington**.
- ▶ Address change, phone, and ANSWR from Levi will cascade to other family members. Select the correct information.

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- ▶ On the “WIC Intake” screen, enter the following information.

Category	Woman, fully breastfeeding
ADD (Actual Delivery Date)	1 week ago
Save	(Must save before selecting transaction type.)
Transaction Type	Recertification
“Go to FPA” pop-up	Select “no”
Check the “No Changes” box	

- ▶ On the “Income Eligibility” screen, still using Lexi Lexington as the client, verify income changes entered for Levi and enter the following information.

Proof of ID	WIC ID Card
Proof of Residency	Utility Bill

- ▶ Save and exit.

➤ **Enroll the infant, Lonnie Lexington.**

- ▶ From the “Enrollment” screen, search for the infant. Enter her “Client Primary” information.

Name	Lonnie [middle initial] Lexington
Gender	female
DOB	1 week ago
Address/Phone Confidential	No
Home Address	Select “unknown” and choose correct address when cascades
Contact by Mail?	Yes
Contact by Phone?	Yes

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Phone	Select unknown and choose correct phone number when cascades
WIC ANSWR	Voice only
Email	Leave blank and select when cascades
Guardian	Lexi [middle initial] Lexington (mom)
Race/Ethnicity	Pacific Islander
Language	English
SSN	none

- On the “Enrollment – Intake Eligibility” screen, using Lonnie Lexington as the client, enter the following information.

Other Family on WIC?	Yes
Clinic	Master
Category	Infant, fully breastfed
Migrant?	No
Homeless?	No
Auto Scheduler, OK?	Yes

- Use “Search for family members” button and select Lexi [middle initial] Lexington.
- Select the correct address, phone, and email information when cascades.

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- › On the “Enrollment – Income Eligibility” screen, using Lonnie Lexington as the client, verify or enter the following information. Information from sibling and mother will cascade to this screen.

Calculate Income for:	Family
Proof of ID	Birth Certificate
Proof of Residency	Utility Bill
Verify	
No. in Family	4
Unborn Counted	0
New Income Date	Today
SNAP	Yes
OHP	Yes
TANF	No
Income	\$445 per week
Income Provider	Father
Proof of Income	Pay stub

- › Save.
- › Fastpath to the Family Cardholder screen, and verify the updated address. Note added family members.

⊗ **STOP**

✓ **Skill Check Information**

- › NOTE: You may make up any information that is not included.
- › A 4-year-old child, **Sasha [middle initial] Seaside** is here for her recertification appointment.
- › Her mother has brought in:
 - Sasha’s birth certificate
 - Sasha’s OHP card
 - a utility bill showing their address

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Activity 5 - Reinstate or Reactivate Making Cardholder Changes

Participants who were terminated from WIC call the clinic wanting to receive WIC services again.

↪ Practice Information

🔄 Reinstate a Client – Negril Nehalem

Practice reinstating a client using the scenario below.



- **Negril [middle initial] Nehalem** comes into your clinic for an enrollment appointment.
- When you search for him, you discover that he was previously enrolled on WIC and his address and phone number are the same.
- His original certification period ended more than 30 days ago.
- You will reinstate him.
- On the “Enrollment Income Eligibility” screen, enter the following:

Calculate Income for:	Family
Proof of ID	Birth Certificate
Proof of Residency	Utility Bill
No. in Family	4
Unborn Counted	0
New Income Date	Today
SNAP	Yes
OHP	Yes
TANF	No
Income	\$506 per month
Income Provider	Father
Proof of Income	Pay stub

- Save.

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- Fastpath to the “Family Cardholder” screen to verify the information is current. (no changes needed)
- The CPA will complete his certification.

↪ **Practice Information**

➡ **Reactivate a client – Karina Keizer**

- **Karina [middle initial] Keizer** comes to the clinic and says that she missed a nutrition education class and does not currently have any benefits.
- From the “WIC Intake” screen, determine the reason she has been terminated and resolve any issues identified.
- Reactivate her.
- Save.

➡ **Saving the Food Package Assignment screen**

- Fastpath to the Food Package Assignment screen, and if the client has current food packages assigned, save the food packages.
- Go to the Family Summary Screen to issue benefits needed and determine what appointments need to be scheduled (more about appointments later).
- Fast Path to the “Family Cardholder” screen.

➡ **Family Cardholder Screen**

- Verify the first cardholder information is correct.
- Fastpath to the “Client Demographics” screen to change the address. Use the following information:

Home Address	1234 N. Oak St. Cannon Beach, OR 97110
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➡ **Family Cardholder Screen - Second Cardholder**

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- Add a Second Cardholder, Teddy Tidewater. Use the following information:

Name	Tidewater, Teddy
Relationship	Grandpa
Address	1212 East Main Newport, OR 97365
DOB	05/07/1957
Card number	<i>Enter new card number</i>

- Save and view “Card History.”

➞ **Removing Second Cardholder**

- Click on the “Remove Second Cardholder” button.
- Save and view “Card History.”

➞ **Second Cardholder Becomes First Cardholder**

- Add a new Second Cardholder, Karl Keizer. Use the following information:

Name	Keizer, Karl
Relationship	Dad
Address	Copy 1 st cardholder address
DOB	02/02/1988
Card number	<i>Enter new card number</i>

- Save
- Click on Change to First Cardholder
- Save and view Card History

➞ **Deactivating and Replacing Cards**

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Deactivate and Replace

- › Click on First Card Actions button, then Deactivate and Replace Card.
- › Reason- "Lost or Unavailable". Enter a new card number.
- › Save and view Card History

Deactivate Only

- › Click on First Card Actions button, then Deactivate (Status) Card.
- › Reason- "Stolen".
- › Click on First Card Actions again- only option is to replace the card.
- › Save and view Card History

⊗ **STOP**

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Activity 6 - Food Package Assignment and Benefit Issuance

Sophie, a pregnant woman, and her 1 year old child Brittany are in your office to update their food packages. Mom has a Medical Documentation form for PediaSure for Brittany. The CPA has approved the new food packages and asked you to enter the info in TWIST and issue benefits. They also need a new eWIC card.



➔ Practice Information

➤ Family Summary Screen

- On the “Family Summary” screen, search for and return with the client, **Sophie** *[agency and middle initial]* **Bates**.
- Select **Brittany Bates** and Fastpath to Certification, Infant/Child and tab to the Food Package Assignment screen.

➤ Food Package Assignment Screen - Child

- Click on the “Special Client” designation.
- In Module C, choose 36 bottles of PediaSure and forecast for the entire certification.
- Click on the Med Doc Info button for the current month and complete the following information:

Dates	The 1 st of this month through the end of the certification.
Medical Provider	Dr. Salmon
Formula	Check “PediaSure”
Supplemental Foods	Issue Full Provision except eggs

- Return to the FPA and modify the foods in Module B as appropriate, forecast Module B for the entire certification.
- Review Row Summary.

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- Save.
- Go out the blue door on the FPA to return to the FSS.
- On the FSS, click on Sophie Bates and Fastpath to Certification, Woman, and tab to the FPA.

➤ **Food Package Assignment Screen - Woman**

- Make the following changes to Sophie's food package assignment:

Qty A	3.5 gallons of milk
Progress Notes	Mom requests less milk
Module B	Select a template for bottled juice

- Forecast for entire certification period.
- Save.
- Click on the blue door to return to the FSS.

➤ **Family Summary Screen**

- Issue benefits for entire family.
- Click the Benefits List button and review.
- Use the Remove Benefits button to remove a future month of benefits.
- Reissue benefits.
- Fastpath to the Family Cardholder Screen.

➤ **Family Cardholder Screen**

- Replace card and make note of the DOB and ZIP and save:

eWIC card number	<i>Use the card reader to swipe your card and enter the card number.</i>
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➤ ***Setting the PIN***

- › Use the following information to set a PIN:

Call Customer Service	855-636-5674, then select 4, then select 2
When prompted for DNIS #	4424
Card Number	First cardholder card number
Date of Birth	From Family Cardholder screen
Zip Code	From Family Cardholder screen
PIN	1234

➤ ***Shopping for WIC Benefits***

- › Use your card and PIN to shop for the following items:

PediaSure	12 bottles (two six packs)
Fruits and Veggies	Your choice
Cereal	1 box
Milk	Some whole and some non-fat or 1%

➤ ***Call customer service again to listen to your balance.***



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➞ **Use shopper education materials to practice teaching a participant how to use their eWIC card.**

➞ **How would you answer questions about shopping problems?**

Figuring out the problem:

- Enough benefit balance?
- Approved food?
- Not assigned?
- Minimum size?
- Needs to be in the APL, but isn't yet?

Possible solutions:

- Mid-transaction review
- Check the balance (Amounts not \$)
- Check the food list to see if authorized
- Send photo of UPC to the state to possibly add
- Cashier doesn't get any info why rejected and can't override

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Activity 7 - Appointment Scheduling: Family Appointment Record and Daily Clinic Schedule

Family Appointment Record

Using **yourself** as the participant recently enrolled, make the following appointment changes on the Family Appointment Record. Use the assigned staff person for your workstation.

↪ Practice Information

☞ Schedule Appointment Now

- On the “Family Appointment Record” screen, schedule a high-risk follow-up appointment for yourself next month.

☞ Reschedule an Appointment

- On the “Family Appointment Record” screen, reschedule the follow-up appointment.

☞ Canceling an Appointment

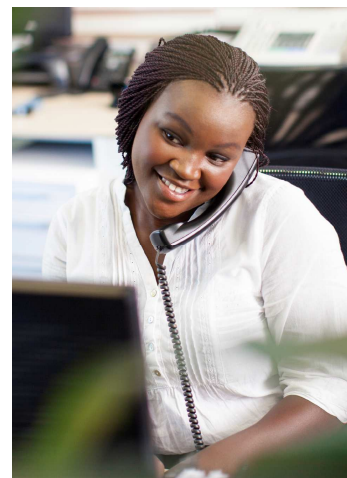
- On the “Family Appointment Record” screen, cancel the follow-up appointment.
- Review the “Cancel/Reschedule History” information for your participant.

☞ Appointment Requests

- Create a follow up appointment for two months from now.
- Modify the request to the next month.
- Delete the appointment request.

☞ Scheduling a Participant into a Nutrition Education Group Appointment

- On the “Family Appointment Record” screen, schedule yourself for a prenatal class for next month.



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➤ ***Scheduling a Participant into an Online Nutrition Education Group***

- On the “Family Appointment Record” screen, schedule yourself for an online course.

➤ ***Appointment Notice***

- On the “Family Appointment Record” screen, print the appointment notice for the prenatal class.

➤ ***Document Appointment Attendance***

- Make an appointment for today for yourself.
- On the “Family Appointment Record” screen, mark the attendance for this month’s appointments.

Daily Clinic Schedule

This practice will cover a variety of appointment functions using the “Daily Clinic Schedule” screen. Use assigned staff for your workstation.

➤ ***Practice Information***

➤ ***Daily Clinic Schedule (View a Staff Member’s Schedule)***

- Use the certifier name provided by your instructor for this practice.
- View today’s schedule.

➤ ***Daily Clinic Schedule (View the Clinic Appointment pop-up)***

- View the “Master” clinic in the “Ford” agency.

➤ ***Access a Nutrition Education Class***

- View a Nutrition Education Class.

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Use the **Lexington** family for the following practice activities.

- › Mom – **Lexi** [*middle initial*] **Lexington**
- › Baby – **Lonnie** [*middle initial*] **Lexington**
- › Child – **Levi** [*middle initial*] **Lexington**

➞ Schedule Appointment Now

- › Use the “Master” clinic in the “Ford” agency.
- › Schedule mom – **Lexi** [*middle initial*] **Lexington**, into a recertification appointment this month.
- › Schedule an individual education appointment for the child **Levi** [*middle initial*] **Lexington**.

➞ Reschedule an Appointment

- › Using the “Reschedule” button, reschedule mom – **Lexi** [*middle initial*] **Lexington**’s recertification appointment to a different time this month.

➞ Canceling an Appointment

- › Cancel the individual education appointment for the child **Levi** [*middle initial*] **Lexington**.

➞ Documenting Appointment Attendance

- › Document that mom – **Lexi** [*middle initial*] **Lexington** has attended her appointment.

➞ Handling Walk-Ins

- › Schedule the baby – **Lonnie** [*middle initial*] **Lexington** as a walk-in appointment on the same day as mom-Lexi’s appointment.

➞ Use the Output (Report) to see the Daily Clinic Schedule.

A mom calls your office to tell you she has missed a NE appointment and needs to reschedule.

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Family Summary Screen

Use the Family Summary Screen to coordinate appointments.

↪ Practice Information

↻ Rescheduling a Missed NE Appointment

- From the “Family Summary Screen”, search for **Becky** [middle initial] **Noti** for this practice.
- Review the information on the “Family Summary” screen.
- Fast Path to the Family Appointment Record and review what she would have been scheduled for.
- Reschedule her NE appointment for next month

↻ Set Issue Month

- Return to the “Family Summary” screen and set issue month for 1 month, with “Missed NE” as the reason.
- Issue benefits for this month.
- Remove the “Set Issue Month” reason.

↻ Coordinate appointments for multiple family members

- Return to the “Family Summary” screen search for the Bates [your middle initial] family.
- Select both family members.
- Set appointments for each family member.

↻ Complete the critical thinking activity on Page XX of the Resource Packet.

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Activity 8 - Food Package Changes, Formula Exchange, Formula Warehouse

Food packages are changed for many reasons. The Bates family from Activity 6 is coming back into the clinic to make changes to their milk and formula. They have already spent part of their benefits. They are returning a six pack of the Pediasure they bought earlier. They need to get their new formula from the formula warehouse. Your RD has approved the packages and Med Doc. You get to do the rest.



➡ Practice Information

➡ Family Cardholder Screen

- › Swipe your eWIC card to find your **Bates family**.
- › Select **Sophie** and Fastpath to the Family Summary Screen.

Food package modification:

➡ Family Summary Screen

- › Click on the Benefits List and review balance.

➡ Food Package Assignment Screen - Woman

- › Select Sophie and Fastpath to the Certification, Woman screen, then select the Food Package Assignment screen.
- › Click on the Modify button.
- › Reduce the milk to the amount already spent which is the lowest number you can select.
- › Insert a row, search for Soy beverage and click “OK”.
- › On the FPA, go to next month’s row and select a template for soy with tofu.
- › Forecast module A and save.
- › Go back out the blue door to the Family Summary Screen.

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Formula Exchange:

➤ **Family Summary Screen**

- › Select Brittany and Fastpath to the Certification, Infant/Child screen, than select the Food Package Assignment screen.
- › Click on the Formula Replacement /Formula Exchange (FR and FX) button and exchange 6 cans of the formula purchased, click “OK”.
- › Click on the Modify button.
- › Reduce the PediaSure to the amount spent and not exchanged (6 bottles).
- › Insert a row for the new formula, Boost Kid Essentials 1.0 and select the correct amount. Click “OK”.
- › On the FPA, go to next month’s row and select a template for Boost Kid Essentials 1.0, adjust the amount.
- › Forecast module C and save.
- › Update the Med Doc info as needed.
- › Save.
- › Go back out the blue door to the Family Summary Screen.

Formula Warehouse:

➤ **Family Summary Screen**

- › Issue benefits.
- › Select Brittany and click on Formula Warehouse button.
- › On the first month select “Other” on address field, add:

Other Address	4444 N. Maple Ave. Oceanside, OR 97999
Other Phone	503-555-5555
Note	Please do not leave package on doorstep.

- › For the remaining months, select Home address and phone.
- › Save.
- › Review the Benefits list.⊗ **STOP**

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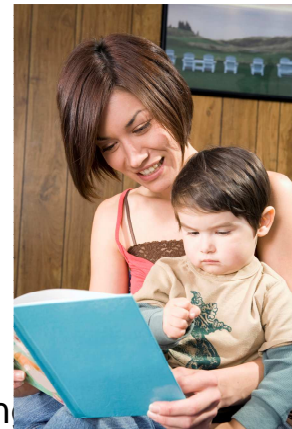
Activity 9 - Foster Families and Custody Changes

When custody changes or a foster child moves, WIC needs to make sure the WIC ID number, eWIC account and cards, benefits, and appointments are correctly updated so the child still appropriately receives WIC services.

↪ Practice Information

Giving a Client a New WIC ID Number

- › Use **Toby [middle initial] Texas** for this practice.
- › On the “WIC Intake” screen, take Toby out of his existing family and give him a new WIC ID number.
- › He will be considered his “own family” as a foster child.
- › His new client demographic information is as follows.



Address/Phone Confidential	Yes
Home Address	2000 NE Walker Road Portland, OR 97232
Phone	(503) 389-0009
Guardian	Shirley [middle initial] Jones (foster mother)

- › Fastpath to the Family Cardholder screen and issue an eWIC card to Shirley.
- › Fastpath to the Family Summary Screen and issue benefits.
- › Schedule any appointment requests needed.

Returning to a Previous WIC ID Number

- › Now **Toby Texas** is moving back to his old family’s home. He was previously on WIC with this family.
- › Move Toby back to his old family.
- › Update his Client Demographic information.

Address/Phone Confidential	Yes
Home Address	485 E. Burnside Dr. Portland, OR 97232

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Phone	(503) 348-2345
Guardian	Tammy [<i>middle initial</i>] Texas (mother)

- Check appointments, eWIC card issuance, and reissue benefits.

Adding a Child to an Existing Family

- **John** [*middle initial*] **Jackson** has been living with a foster mother named **Jill Jeffreys**.
- He has just moved to a new family. The new foster mother, **Naomi** [*middle initial*] **Newberg**, has another foster child, **Frannie** [*middle initial*] **Foster** on WIC.
- Move John Jackson into Naomi Newberg's family.
- Select the correct new address.
- Check appointments and eWIC card issuance.
- Issue benefits and review the Benefits List.

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Activity 10 - Transfers and Terminations

Everyone is moving today! Transfers coming into your clinic and transfers going out of your clinic! You are in charge of moving them all.

↪ Practice Information

➤ Transferring a Client from Outside Oregon

- Search for and transfer-in the following client.
- On the “Client Primary” screen, enter the following information.



Name	Fahid [middle initial] Fox (male)
DOB	3 years ago
Address	1700 N. Coyote Road Wolf Creek, Oregon 97497
Contact by Mail?	Yes
Contact by Phone?	Yes
Phone	(541) 393-9904 (cell, voice and text)
E-mail	MommaFox@email.com
Guardian's Name	Freida [middle initial] Fox (mother)
Race/Ethnicity	Asian (Not Hispanic)
Language	English (spoken and written)

- On the “WIC Intake” screen, using Fahid Fox as the client, enter the following information.

Other Family Members on WIC?	No
Clinic	Master
Category	Child, 24 – 60 months

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Migrant/Homeless?	No
Auto Scheduler, OK?	Yes
Certification Start Date	3 months ago
Certification End Date	3 months from now

- Generate WIC ID.
- Save.
- On the “Transfer Information” screen, using Fahid Fox as the client, enter the following information.

Date Last FI's Issued	First day of last month
Proof of ID	Birth Certificate
Proof of Residence	Mail
Anthro/Bio Info	Measurement Date – 3 months ago Weight – 30 pounds Height – 34 inches Hemoglobin – 13 g/dL
Nutrition Risk	502 – Transfer of Certification
Food Package Assignment	Standard child food package

- On the Family Summary Screen, schedule the client for the appropriate appointments.
- Issue benefits.
- Fast path to the Family Cardholder Screen and issue a card.

Cardholder name	Freida Fox
Relationship	Mom
Date of Birth	01-01-1991
Card number	Issue a card

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➤ **Completing a Transfer-In Within Oregon**

- Search for and transfer-in the following client.

Name	Dorena [Baker - middle initial] Drain
Old Agency	Baker
New Clinic	Master
New Address	399 West 4 th Avenue Silverton, OR 97381
New Phone	(541) 388-2230

- Review the Family Summary Screen, schedule appointments and issue benefits as needed.

➤ **Printing a VOC/Transfer Card**

- Search for **Serena** [middle initial] **Sandy** and find her WIC ID number.
- Then print a VOC card.



➤ **Terminations and Ineligibility**

A mother tells you that her child is now in custody of her father in another state. The child needs to be terminated.

- From the “WIC Intake” screen, search for and return with **Veronica** [middle initial] **Vida**.
- Select the Termination transaction type and save.
- Select “yes” from the “Do you want to print a termination notice?” pop-up.
- Select “Issue Manually” and save.

✓ **Skill Check Information**

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Use the scenarios below to practice transferring and terminating clients.

Skill Check Scenario #1:

- **Kimberly** [*middle initial*] **Birkenfeld** has a transfer card from another state and is now living in Oregon.
- Her transfer card indicated that her certification ends in two months and that she received benefits last month.
- Her height is 68", weight is 120#, hematocrit is 33%. Her nutrition risk is underweight and inadequate weight gain.
- Her EDD is 1 month from today.
- Her new address is:
 - 1700 W. Mountainview Ct. #333
 - Brookings, OR 97415
- She does not yet have a phone number.

Skill Check Scenario #2:

- **Desiree** [*middle initial*] **Dundee** has just moved to your town from Baker County WIC.
- Her new address is:
 - 4 NE Circus St.
 - Cottage Grove, OR 97424
- Her new phone is: (541) 392-0912.

Skill Check Scenario #3:

- **Veronica** [*middle initial*] **Vida** is moving out of state.
- Print her VOC card.

Skill Check Scenario #4:

A pregnant woman, **Becky** [*middle initial*] **Noti**, calls to say that her income has changed and she no longer needs WIC. Take appropriate action.

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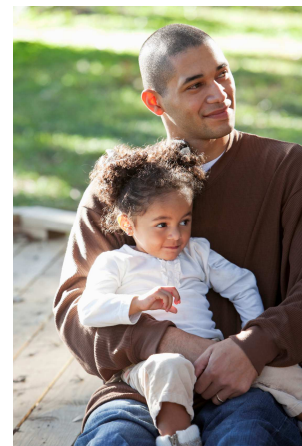
Activity 11 – What’s Left?

Entering a complaint

A client calls to tell you when he went to the store with his wife, the clerk was rude to them and made a comment about WIC clients. The clerk was an older white man with a mustache.

➡ ***Enter a complaint.***

- Access the “Complaint” screen through Operation Management ⇒ Compliance ⇒ Complaints
- On the “Complaint” screen, enter the following information.



Against	Vendor
Event Date	Yesterday
Complain Source	Client
WIC ID	Fahid [middle initial] Fox
Vendor Name	Albertsons Test
Issue	Rude behavior by checker

- In the “Complaint Description” field, enter information about the complaint.
- Complete the “Person Involved” fields: Title = checker; Role = offender; Description of person = physical description

What can you do over the phone?

What information is considered “security data” when verifying the identity of someone on the phone?

What are the 3 things you cannot do over the phone?

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End of month issuance

Benefits issued in the last 5 days of the month have at least 5 days to be used, so the last date to use may be in the next month. This may result in overlapping benefits.

Look at the sample Benefits List and determine what would be important to point out to the cardholder.

WIC Benefits List		
Benefits Available as of 07/30/2015 10:26		
WIC Family ID: 1122259		
First Cardholder: No Cardholder		Second Cardholder:
Benefits for: 7/30/2015 through 8/4/2015		
Family Member/s: Test Client, Training - C2-5		
Quantity	Unit	Food Item Description
1	LB	Cheese
1	DOZ	Eggs - large
18	OZ	Cereal - hot / cold
1	CTR	Peanut butter / dry beans / peas / lentils
16	OZ	100% Whole wheat bread/corn tortillas/brown rice
8	\$\$\$	Fruit and vegetables - fresh / frozen
1.75	GAL	Fat free or 1% milk
1	CTR	64oz bottle / 16oz frozen juice
Benefits for: 8/1/2015 through 8/31/2015		
Family Member/s: Test Client, Training - C2-5		
Quantity	Unit	Food Item Description
1	LB	Cheese
1	DOZ	Eggs - large

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WICShopper app

➡ Key Features

- Track benefit balance
- Check foods for eligibility
- Benefit expiration reminder
- Listing of approved foods
- WIC clinic or store locator
- Life Hacks
- Food Hero recipes
- eWIC card use videos

What do you think is important to share with cardholders?

