

Situation	Correct Process
<p>New Any, previously in same agency, termed:</p>	<ul style="list-style-type: none"> ✘ Client Processes ➤ Search and Double click ➤ Verify demographics ➤ Exit ➤ Return with client ➤ change transaction code to “Reinstate” (if >30 days from cert end date or new pregnancy) or “Reactivate” (if <30 days from the cert end date).
<p>Entered Duplicate Client in Client Primary (not in TWIST yet):</p>	<ul style="list-style-type: none"> ✘ Insert word “Duplicate” in the first name field after the actual first name ➤ Save ➤ Exit ➤ Search for existing Client Master record ➤ Return with client and continue with cert process.
<p>Entered Duplicate client in TWIST:</p> <p>E.g. First: Sasha Duplicate Middle: A Last: Seaside</p>	<ul style="list-style-type: none"> ✘ If two records exist <u>with completed cert screens</u>, keep the most current ➤ Term and insert “Duplicate” in the first name field after the actual first name. ✘ If two records exist and you have not completed cert screens, Stop! ➤ Term and insert “Duplicate” in the first name field after the actual first name. ➤ Search for existing Client Master record ➤ Return with client and continue with process. ✘ Option: Follow the steps outlined above. ➤ Change the WIC ID of the record to be terminated. ➤ Make a note of the ID number in the WIC notes of the active client. ➤ This keeps the duplicate record from showing on the FAR or FSS screens.
<p>Alias names: [eg. woman gets married]</p> <p>If you accidentally put the new name as an alias:</p>	<ul style="list-style-type: none"> ✘ Client Processes ➤ Search by previous (maiden) name and Double Click on client name ➤ Enter new name ➤ Check “Create Alias name” box ➤ Save. ✘ Client Processes ➤ Search by previous (maiden) name and Double Click on client name ➤ Enter correct name ➤ Check “Create Alias name” box ➤ Save ➤ Go to “Alias” tab ➤ remove row with new name (row with previous or maiden stays).

Process: Certifications and Recertifications

Situation	Correct Process
Recert child:	<ul style="list-style-type: none"> ✘ Client Processes ➤ Search ➤ Verify demographics ➤ Exit ➤ Return with client ➤ Verify cert end date is +/- 1 month ➤ Transaction Type to “R” (recertify) ➤ Save ➤ Exit.
Recert Prenatal to Postpartum:	<ul style="list-style-type: none"> ✘ Client Processes ➤ Search ➤ Verify demographics ➤ Exit ➤ Return with client ➤ Verify cert end date is +/- 1 month ➤ Verify category <u>is Prenatal</u> ➤ change category ➤ Enter “ADD” ➤ Transaction Type to “R” (recertify) ➤ Save ➤ Exit.
Certifiers: Starting the cert:	<p>Client Processes ➤ Certification ➤ Woman or Infant/Child ➤ Search and Retrieve Client.</p> <ul style="list-style-type: none"> ✘ If check marks are present, incorrect data was entered on the Intake and Eligibility screens. <u>Exit</u> to Enrollment ➤ Check cert dates ➤ change EDD, ADD, or category ➤ Verify correct transaction type was selected ➤ Fast Path to Certification and complete certification. ✘ If checkmarks are not on tabs ➤ Verify transaction type and continue with certification.
Entering information from the Data Entry Document (Paper Cert):	<ul style="list-style-type: none"> ✘ Client Processes ➤ Enrollment ➤ Search and Retrieve client ➤ Follow check-in procedures ➤ Follow steps in “Starting the cert” ➤ Transaction Type may not be correct on the DED, Verify ➤ Continue entering certification info ➤ Issue benefits.

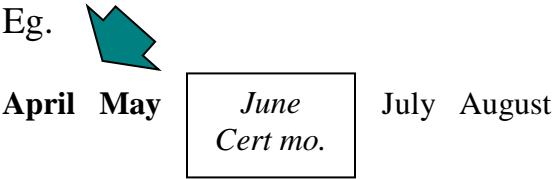
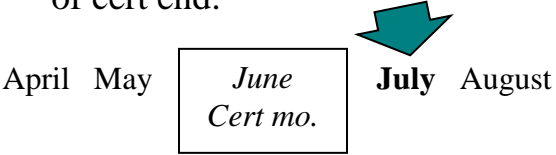
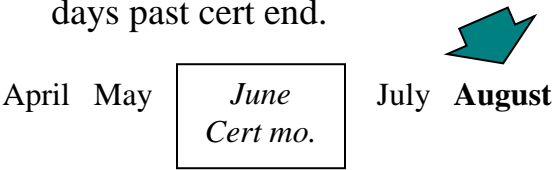
Process: Foster Children

Situation	Correct Process
New foster parent, new foster child (Never been on WIC before):	✘ Client Processes ➤ Enrollment/ Prescreen ➤ Search and Add ➤ Client family status to “client” ➤ Family of “1” (continue with cert).
New foster parent, active child, same agency: **Address changes will not reflect in all foster children with same foster parent unless WIC IDs are connected.	✘ Client Processes ➤ Enrollment/Prescreen ➤ Search and Retrieve ➤ Generate new WIC ID ➤ Change client family status to “client” ➤ Family of “1” (continue with cert) ➤ Change other family members to “No” ➤ Change address and guardian info ➤ Do not allow address to cascade to other family members ➤ Schedule appt, issue benefits as needed.
Foster child termed in same agency, within cert end date:	✘ Client Processes ➤ Enrollment ➤ Search and Retrieve ➤ Change transaction code to “ <u>Reactivate</u> ” ➤ same step as “New foster parent, active child, same agency.”

Process: Issuing Benefits

Situation	Correct Process
Issuing a partial package:	✘ System automatically selects preferred partial package starting the 20 th of the month until end of month.

Process: Transfers

Situation	Correct Process
<p>Transfer from within Oregon:</p> <ul style="list-style-type: none"> ✘ Active, TWIST agency ✘ Termed, agency, before cert end date. Eg.  ✘ Termed, agency, within 30 days of cert end.  ✘ Termed, agency, more than 30 days past cert end.  	<ul style="list-style-type: none"> ✘ Client Processes ➤ Transfer from within Oregon ➤ Search ➤ Retrieve ➤ Select Clinic for each family member ➤ Click on “Transfer” Button ➤ Continue with appropriate process ✘ Client Processes ➤ Transfer from within Oregon ➤ Search ➤ Retrieve ➤ Select Clinic for each family member ➤ Click on “Transfer” Button ➤ Fast Path to Enrollment ➤ Search and Retrieve client ➤ Change transaction type to “Reactivate” ➤ Continue with process. ✘ Client Processes ➤ Transfer from within Oregon ➤ Search ➤ Retrieve ➤ Select Clinic for each family member ➤ Click on “Transfer” Button ➤ Fast Path to Enrollment ➤ Search and Retrieve client ➤ Change transaction type to “Recert” ➤ Continue with process. ✘ Client Processes ➤ Transfer from within Oregon ➤ Search ➤ Retrieve ➤ Select Clinic for each family member ➤ Click on “Transfer” Button ➤ Fast Path to Enrollment ➤ Search and Retrieve client ➤ Change transaction type to “Reinstate” ➤ Continue with process.
<p>Transfer from outside of Oregon:</p> <ul style="list-style-type: none"> ✘ Never on Oregon WIC 	<ul style="list-style-type: none"> ✘ Client Processes ➤ Transfer from Outside Oregon ➤ Search ➤ Add new client

Process: Miscellaneous

Situation	Correct Process
eWIC card was lost or stolen:	<ul style="list-style-type: none"> ✘ Family Cardholder Screen ➤ Card Actions ➤ Select “Stolen” or “Lost/Unavailable” ➤ Issue new card if appropriate
Phone Call: I have a future appt but need to reschedule:	<ul style="list-style-type: none"> ✘ Client Processes ➤ Family Summary Screen (FSS) ➤ Fastpath to Family Appt. Record (FAR) ➤ Search and Retrieve Client ➤ Select client for appt. ➤ Select the “Reschedule” button ➤ Select a clinic ➤ Click the “Find appt” button ➤ locate the time, date and type of appt. and “Book.”
Phone Call: I missed my appt and need to reschedule:	<ul style="list-style-type: none"> ✘ Client Processes ➤ Family Summary Screen ➤ Search and Retrieve client ➤ Fast Path to Family Appt. Record ➤ Make new appt.
Phone call: I had a miscarriage: (active client)	<ul style="list-style-type: none"> ✘ Client Process ➤ Enrollment ➤ Search and Retrieve client ➤ Enter ADD ➤ Change category to “non-breastfeeding” ➤ Continue with scheduling an appt. ➤ Use RM appt type ➤ Change transaction type to “recert” ➤ When client comes <u>in</u> for appt. ➤ Change transaction type to “recert” and continue with recert process.
Phone call: I had my baby and I am breastfeeding	<ul style="list-style-type: none"> ✘ Enrollment ➤ Intake Tab ➤ Search and Retrieve mom’s record ➤ On Intake tab, change category to “WE” ➤ Enter ADD ➤ Save ➤ Fast Path to Cert ➤ FPA Tab ➤ Verify appropriate food package ➤ Save ➤ Go to the FSS ➤ Issue benefits.
Phone call: I need an appointment – (staff not sure why or which family member):	<ul style="list-style-type: none"> ✘ Client Processes ➤ Family Summary Screen ➤ Search and Retrieve client ➤ Did they miss an appt.? ➤ may need to Fast Path to FAR for additional information about Appts ➤ Continue with appropriate process

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