

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.
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- 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.**

The screenshot shows the 'Client Search' window in the FamilyNet application. The search criteria are: Last Name: Joh, First: And, Middle: (empty), Range for Date of Birth: 05/01/2000 to 05/01/2000, State ID: (empty). The search results table is as follows:

State ID	Last	First	Middle	Suffix	DOB	Name Type
2351858	Johanson	Andy			05/01/2000	Real
2351857	Johnson	Andrea			05/01/2000	Real
2351855	Johnson	Andrew			05/01/2000	Real
2351856	Johnston	Andrew			05/01/2000	Real

At the bottom of the window, it indicates '4 Clients found' and provides buttons for 'Search', 'New Search', 'Add New Client', 'Return W/Client', and 'Return W/O Client'.

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.**

Guardian Name	State ID	Last	First	Middle	DOB	Name Type
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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.

The screenshot shows the 'Client Primary' screen with the following sections:

- Name:** Local Id, Last Name, First Name, Middle Name, Suffix, Date of Birth, Gender, Addr/Phone Confidential, Create Alias Name checkbox.
- Address:** Addr Type, Str #, Pre Dir, Str Name, Str Type, Post Dir, Apt, Zip, + four, City, St, Roll/Prv, Lst Chg.
- Contact:** May we contact you by mail?, May we contact you by phone?, Telephone (Phone Type, Area, Phone, Extn, Phone Options), WIC ANSWER (Voice, Text), E-mail checkbox.
- Guardian:** Last Name, Middle Name, First Name, Type.
- Demographics:** Race, Ethnicity, Spoken Lang, Written Lang, Alt Format, Medicaid #, SS #, Deceased (Yes/No), Deceased Date.

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.

Telephone					WIC ANSWR	
Phone Type	Area	Phone	Extn	Phone Options	Voice	Text
Cell Phone	503	123-4567		Both Voice &	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Home	503	555-1212		Voice Only	<input type="checkbox"/>	<input type="checkbox"/>

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).

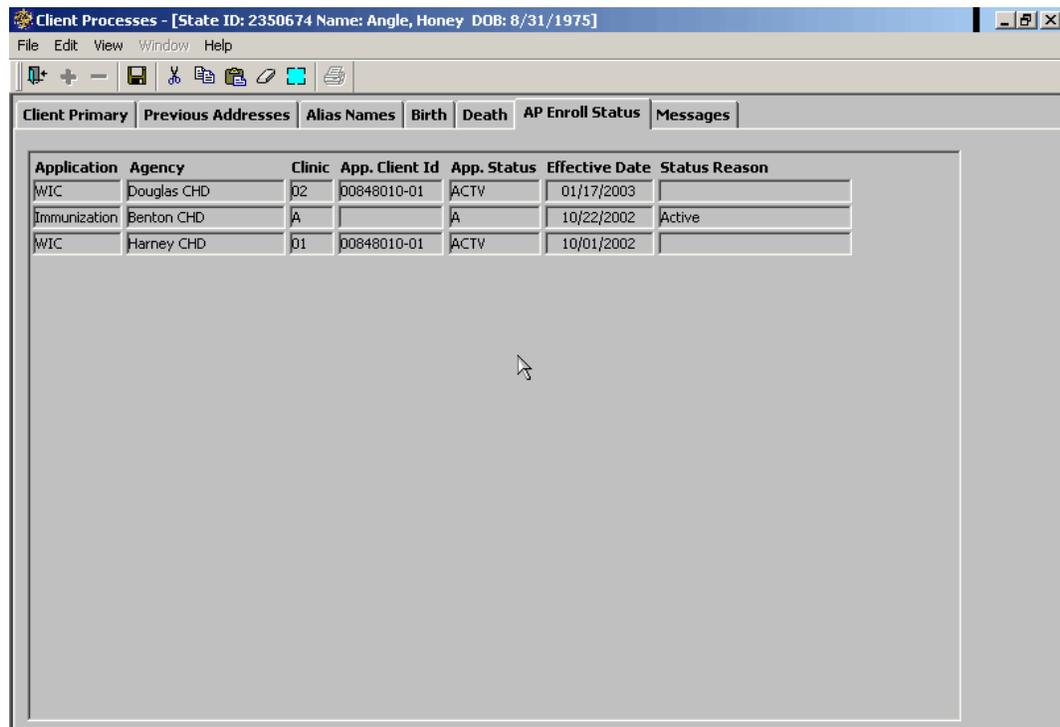
5.16 “**ANSWER E-mail**” checkbox: User may check this box if the participant wants an e-mail notification from ANSWR. This checkbox is disabled until an e-mail address is entered in the “Client Email” field and the user tabs over or clicks “Save.”

Client E-mail:	<input type="text" value="clientname@email.com"/>	E-mail <input type="checkbox"/>
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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.



Application	Agency	Clinic	App. Client Id	App. Status	Effective Date	Status Reason
WIC	Douglas CHD	02	00848010-01	ACTV	01/17/2003	
Immunization	Benton CHD	A		A	10/22/2002	Active
WIC	Harney CHD	01	00848010-01	ACTV	10/01/2002	

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.**

Client Processes - [Adding New Client]

File Edit View Window Help

Client Primary Previous Addresses Alias Names Birth Death AP Enroll Status Messages

Message Created By User Id sgoodric Created Date 01/23/2003

Message Urgent Status Yes No Activate Date 01/23/2003

Expire Date

Message Text

Message # 1 of 1

<< >>

Figure 8: “Messages” Screen

- After a message has been entered and saved, a lightning 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.

Old DOB	New DOB	Changed Date & Time	Changed By User
07/04/2011	07/05/2011	08/11/2011 @ 1:58 pm	Linh Diep

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 ANSWER 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.

Phone Type	Area	Phone	Extn	Phone Options	WIC ANSWR	
					Voice	Text
Home	503	555-1212		Voice Only	<input type="checkbox"/>	<input type="checkbox"/>
Cell Phone	503	123-4567		Both Voice &	<input type="checkbox"/>	<input type="checkbox"/>

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: