

## **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:***

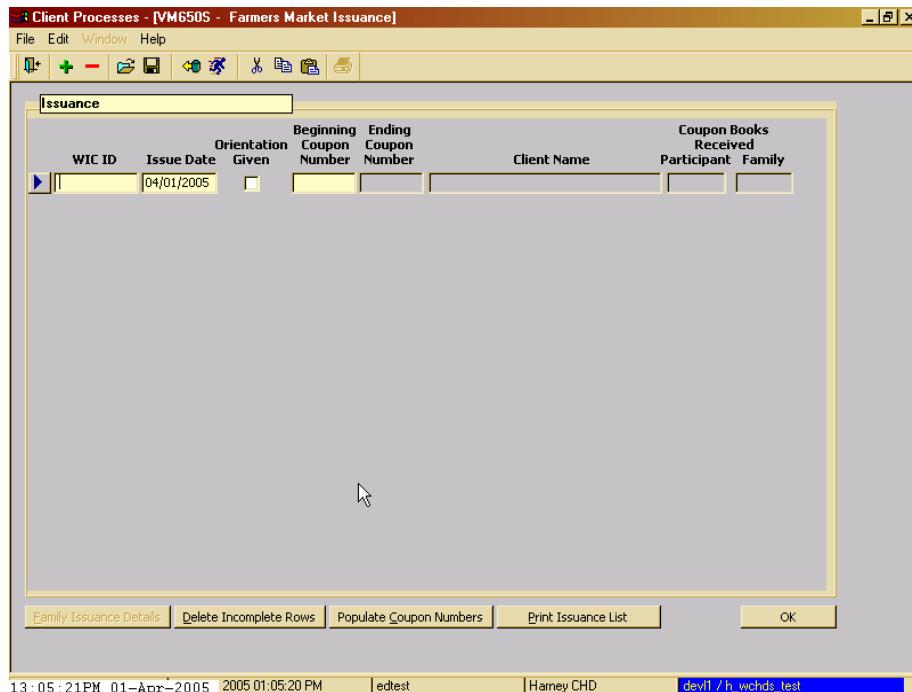
☛ 1100 Farm Direct Nutrition Program Local Program Responsibilities

#### ***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.

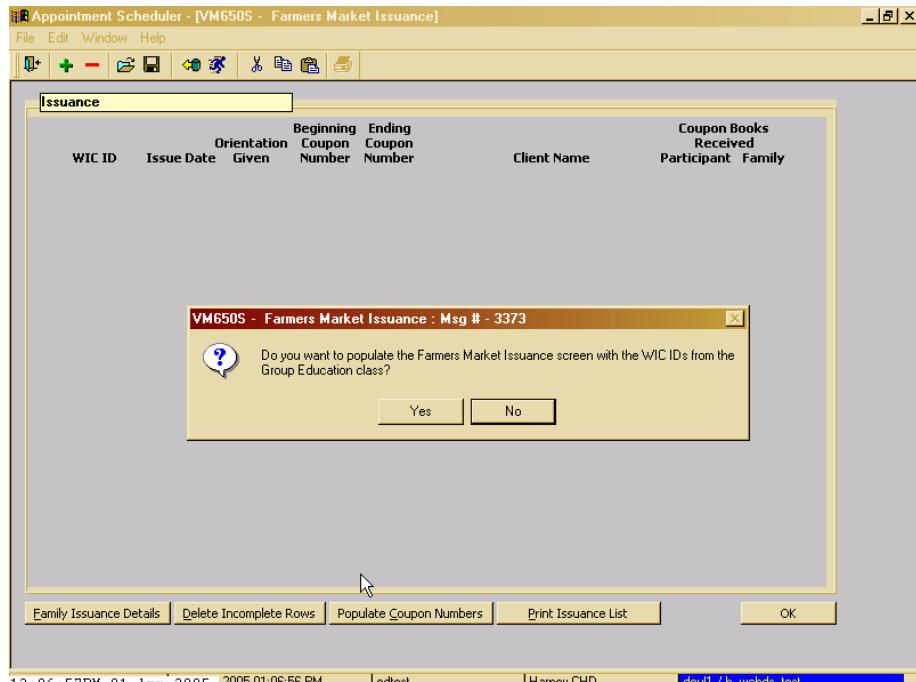
**1. Retrieve the appropriate class.**

+ 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.”**

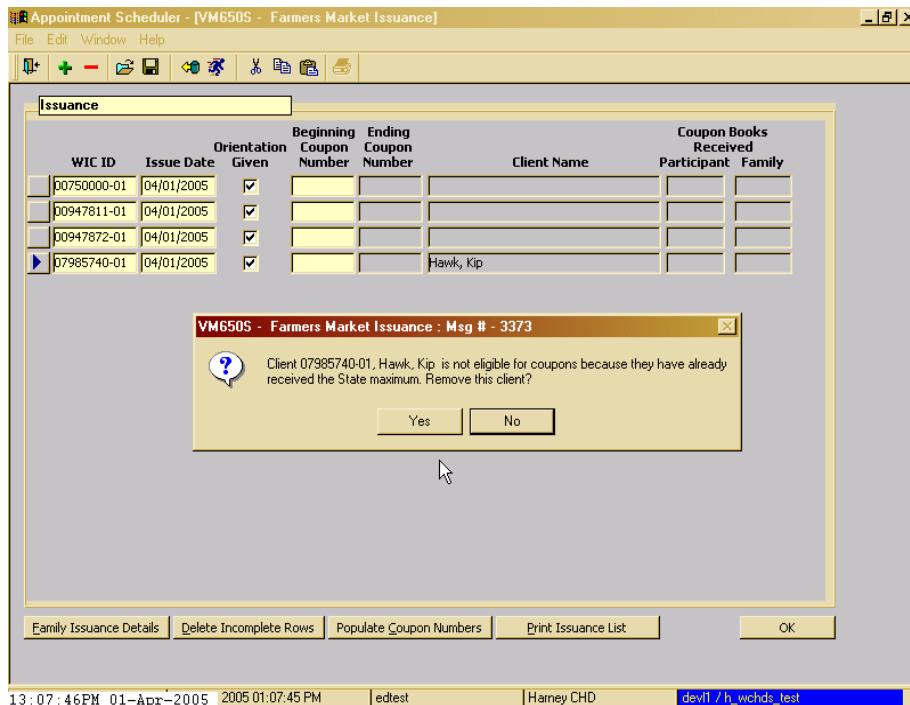
**3. Save.**

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.

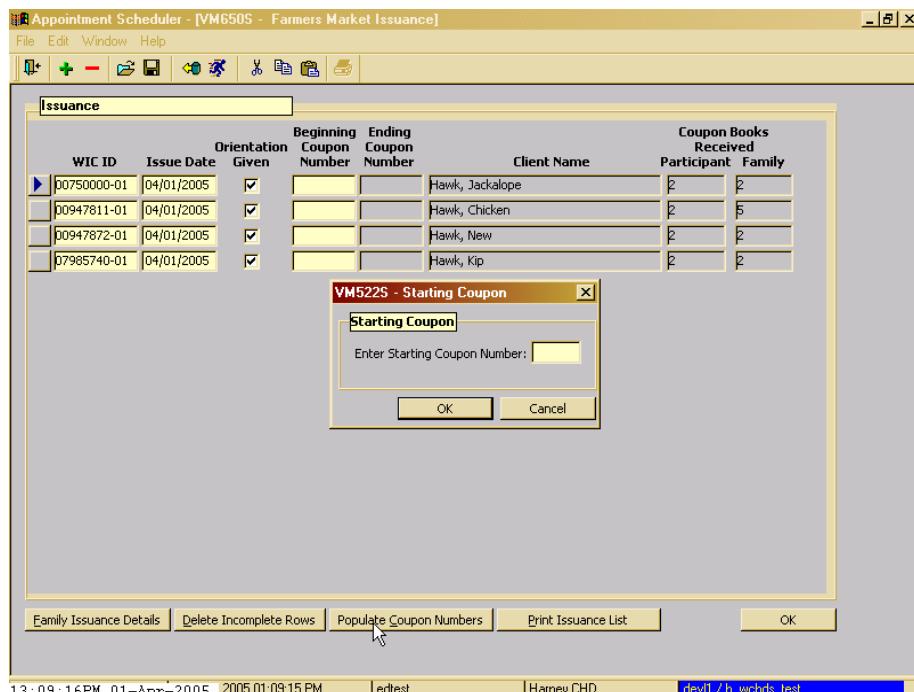


**Figure 3: “Farmers’ Market Issuance” Ineligibility Message**

- 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.

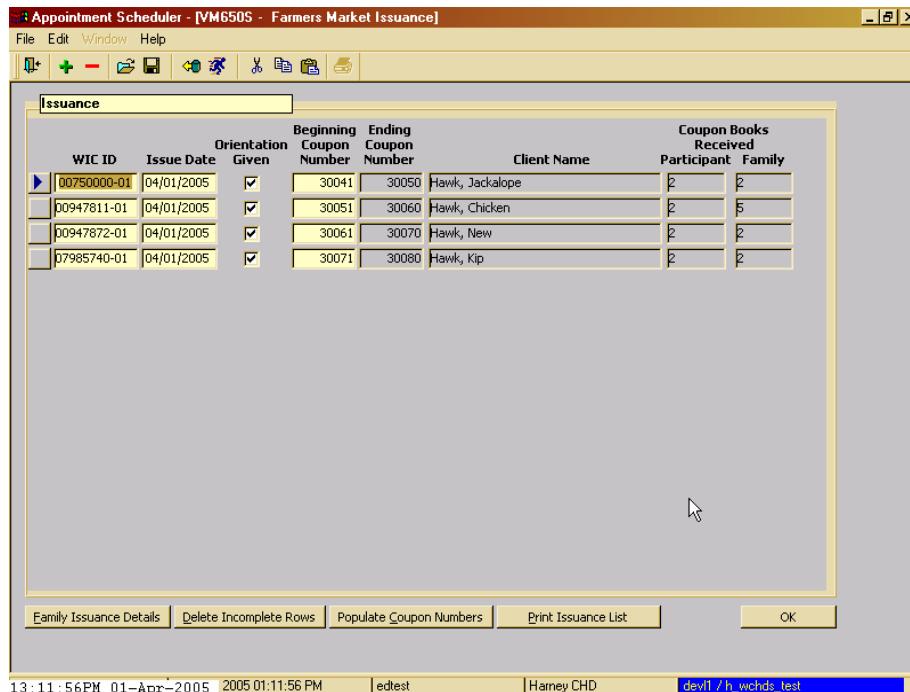
- Make sure to remove any family members that would cause the family to exceed your agency's maximum family benefit.
- “**Issue Date**” defaults to today’s date.
- “**Orientation Given**” automatically populates in this screen but may be unchecked if needed.
- “**Client Name**” also automatically populates 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***

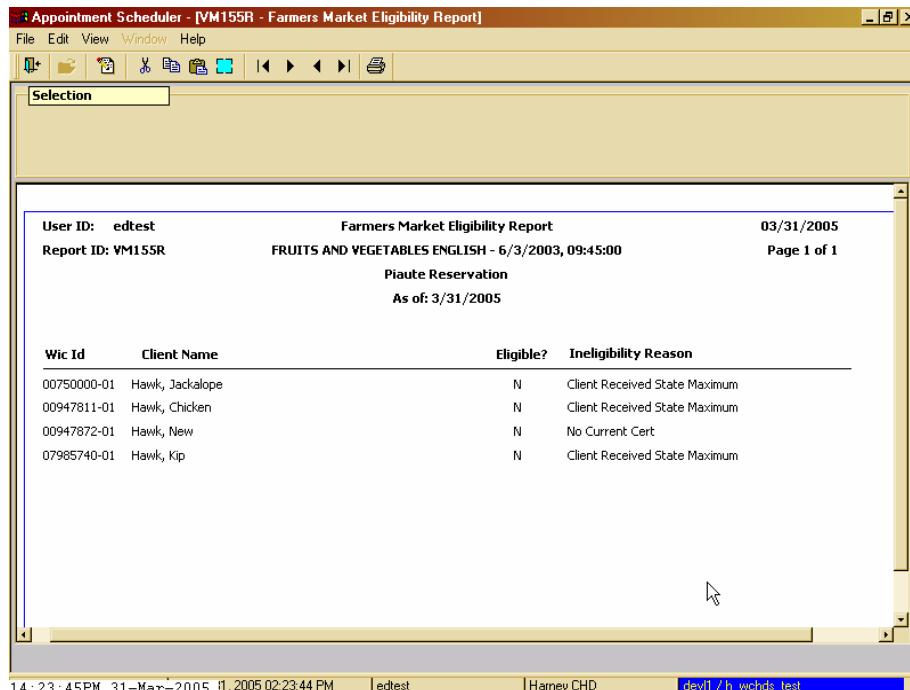
The starting point for this section is:

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.**

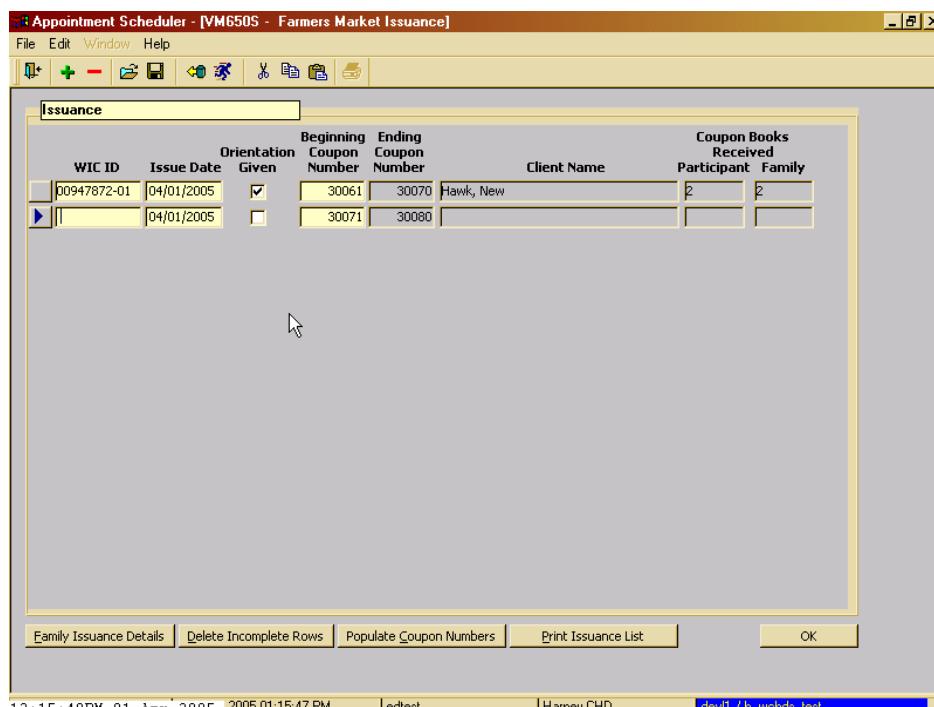


**Figure 6: “Farmers’ Market Eligibility Report” Screen**

- 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:***

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