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## **Chapter 3: Participant Processes**

### **Section 1: Intake**

#### **Lesson: Breastfeeding Peer Counselor Assignment**

#### ***Objectives:***

Upon completion of this lesson the user will be able to:

- use the “Assign Peer Counselor” function;
- modify information in the “Assign Peer Counselor” screen;
- assign a peer counselor to a participant that has had a peer counselor with a previous baby;
- inactivate a participant in the breastfeeding peer counseling program; and,
- print peer counseling reports.

#### ***Oregon Policies:***

- ◆ 718 Breastfeeding Peer Counseling: Job Parameters, Protocol and Scope of Practice

#### ***Overview:***

This lesson covers how you will use TWIST to assign a Breastfeeding Peer Counselor to a WIC participant who is pregnant and has indicated that she would like to have a Breastfeeding Peer Counselor. You will learn how to enter and update data in the “Assign Peer Counselor” screen. You will learn the impact this screen and fields have on the reports that Breastfeeding Peer Counselors, Coordinators and State WIC Staff use, and you will learn how to print a Peer Counseling report.

♪ NOTE: Once a participant has been assigned to a peer counselor in TWIST, a schedule of calls is available in the report “PC Schedule for Participant Contacts”. See the last section of this lesson on running Peer Counseling Reports.

#### ***Instruction:***

#### ***Entering or Updating the Peer Counselor Assignment***

The starting point for this section is:

Participant Processes ⇒ Enrollment and Intake ⇒ Enrollment

♪ NOTE: The participant must be fully certified in TWIST before assigning a peer counselor.

1. **Open the “Enrollment” screen and retrieve the participant to be assigned a peer counselor.**

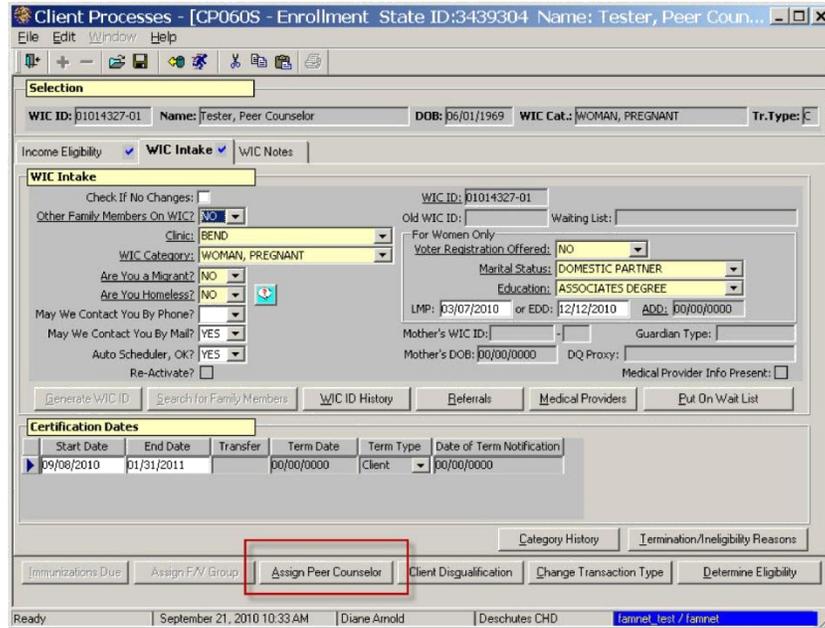


Figure 1: “Enrollment” Screen

2. **Click on the “Assign Peer Counselor” button at the bottom of the screen to open the “Assign Peer Counselor” pop-up.**

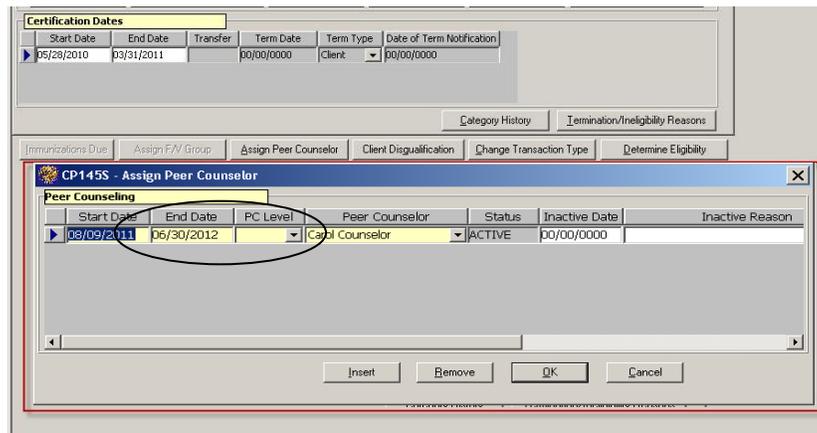
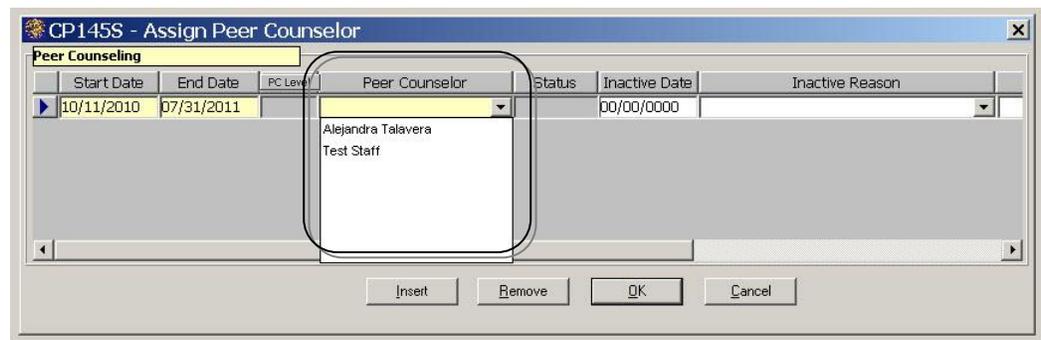


Figure 2: “Assign Peer Counselor” Pop-Up showing Start and End Dates auto-filled

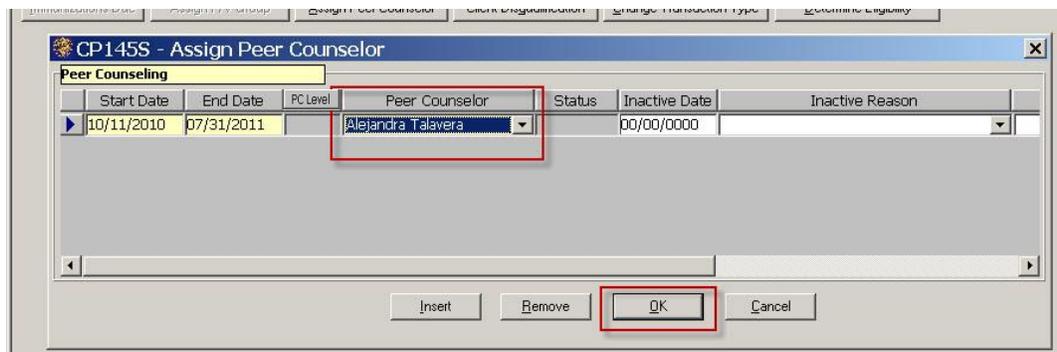
♪ NOTE: The Start Date will automatically fill with today's date. The End Date will automatically fill a date six months from the EDD rounded to the end of the month. Once the ADD has been entered in the Intake Screen, the End Date will adjust to six months from ADD.

♪ NOTE: Peer counselor staff must first be added to the "Staff Information" table in the "Operations and Management" module, which requires the Breastfeeding Peer Counselor Coordinator to have the correct security role.



**Figure 3: Peer Counselor" drop down displaying peer counselors**

3. **Click on the name of the counselor.**



**Figure 4: "Peer Counselor" field with counselor selected and OK button**

4. **Click on the "OK" button to close the "Assign Peer Counselor" Screen.**

♪ NOTE: TWIST automatically adds "ACTIVE" to the Status field after OK is clicked and the Assign Peer Counselor screen is closed. When a woman is no longer participating in the peer counselor program, the status will be "INACTIVE".

♪ NOTE: To change a peer counselor, repeat the process for accessing the Assign Peer Counselor screen and select a different peer counselor.

## 5. Select "PC Level."

- Agencies with Breastfeeding Peer Counselor programs may assign one of two PC levels, "PC" or "PC1". The levels are used to organize the Peer Counseling program participants into the two groupings.
- TWIST will auto fill "PC" when you assign a woman to a peer counselor. "PC" identifies the routine service - enrolling pregnant women into the prenatal series.
- "PC1" identifies the non-routine service - enrolling pregnant women and following them individually during office visits, one to one, instead of in a group.

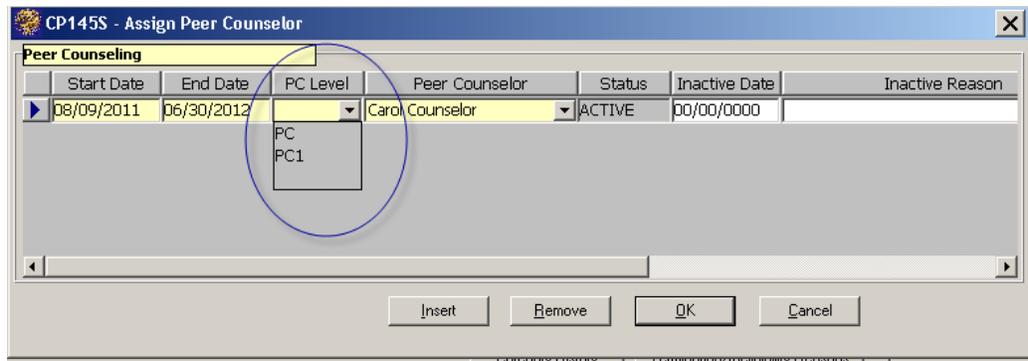


Figure 5: PC Level drop down.

- Once the PC level is assigned on a participant's "Assign Peer Counselor" pop-up, it will display on the blue title banner for the client at the top of the screen. The blue banner will display "PC Level: PC," "PC Level: PC1" or "PC Status: Inactive."

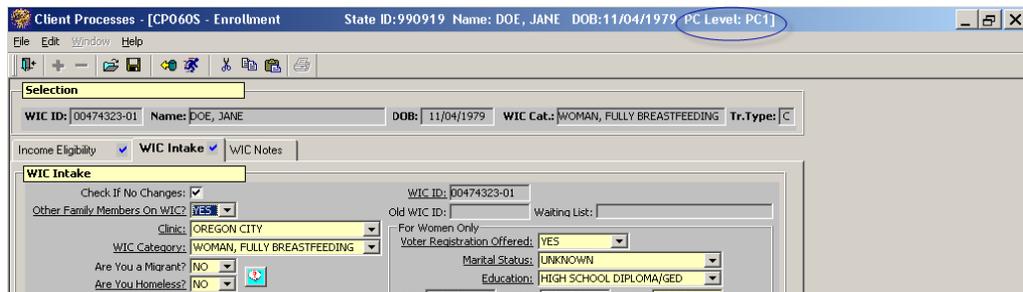
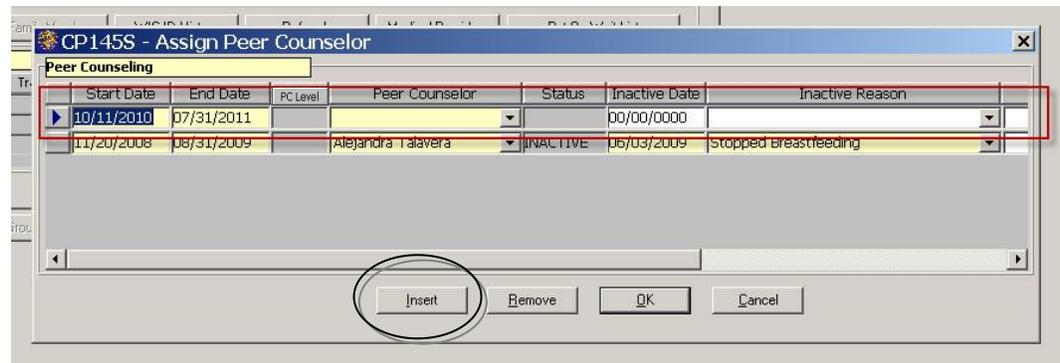


Figure 6: PC Level Status display in blue banner.

### ***Assigning a Peer Counselor When the Participant has had a Peer Counselor With a Previous Baby***

1. To add the peer counselor assignment for a new pregnancy, click the “Insert” button in the “Assign Peer Counselor” pop-up to add a new row.



**Figure 7: New row inserted when participant was assigned a Breastfeeding Peer Counselor with a previous baby.**

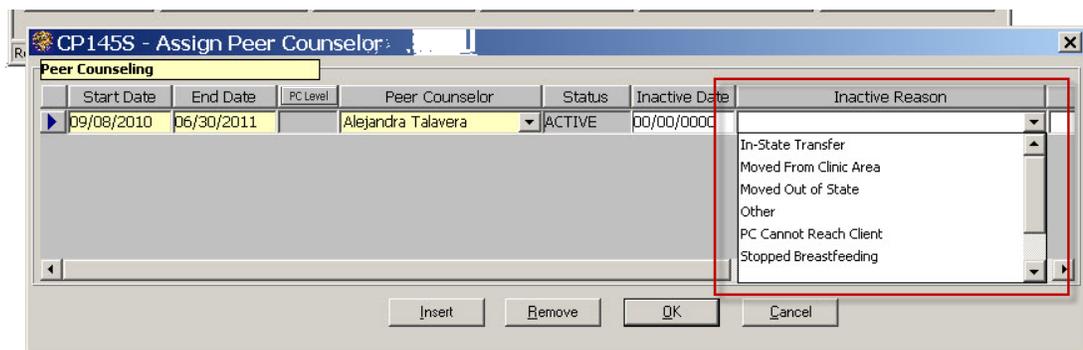
2. In the new row, follow the steps for assigning a peer counselor described in the previous section.

### ***Inactivating a Peer Counseling Participant***

The “Assign Peer Counselor” screen is designed to update the reports that the Breastfeeding Peer Counseling Coordinator uses to manage the program, including when and why a participant stops participating.

The starting point for this section is:

Participant Processes ⇒ Enrollment and Intake ⇒ Enrollment ⇒ Assign Peer Counselor



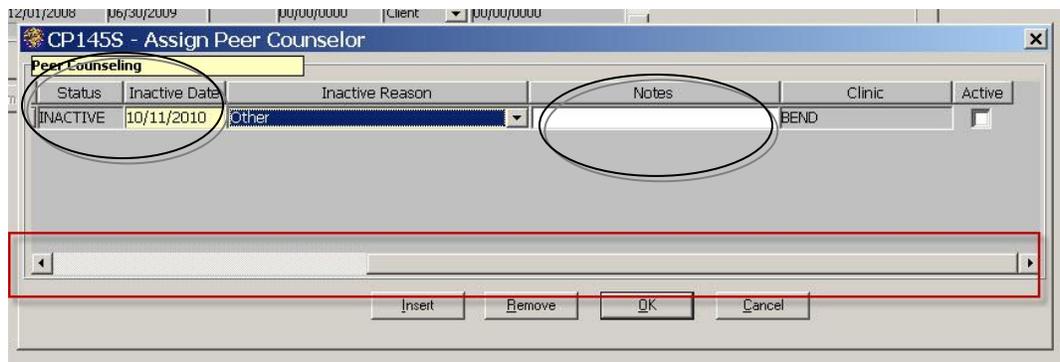
**Figure 8: “Inactive Reason” drop-down list**

1. **Select an Inactive Reason**

♪ NOTE: The “Status” and “Inactive Date” will auto-fill once a reason has been selected. This date can be changed manually.

Select “Other” for inactive reasons not in the drop down list, including:

- Miscarriages
- Victims of domestic violence that have moved for safety reasons
- Deceased mother or baby
- Incarceration of mother



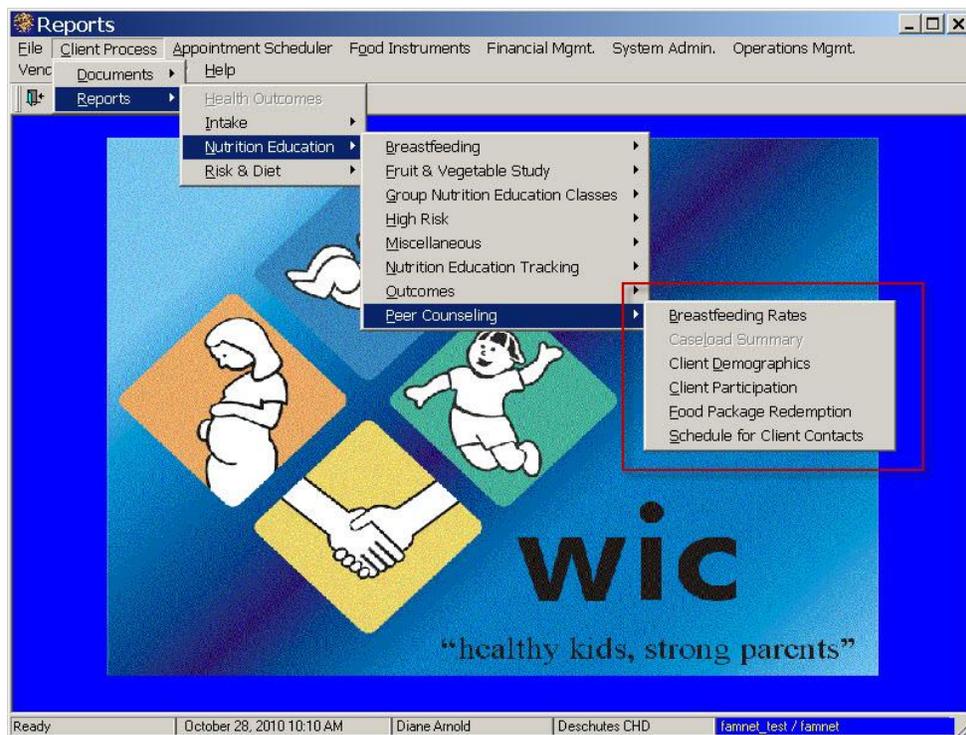
**Figure 9: “Notes” field**

2. **Scroll right to the “Notes” field if needed.**
3. **Click the OK button to close and update the record.**

### ***Peer Counseling Reports***

The starting point for this section is:

Client Processes ⇒ Reports ⇒ Nutrition Education ⇒ Peer Counseling



**Figure 10: File Menu with Breastfeeding Peer Counseling Reports.**

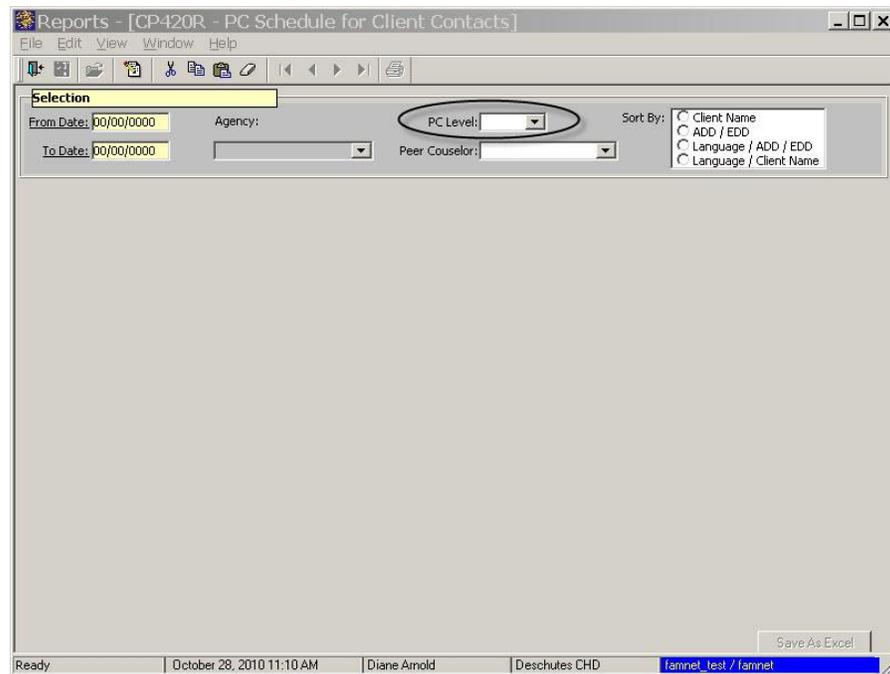
The reports available in the Peer Counseling File Menu are specific to Breastfeeding Peer Counseling participation and include:

- Breastfeeding Rates
- Caseload Summary
- Client Demographics
- Client Participation
- Food Package Redemption
- Schedule for Client Contacts

The Start and End Dates and Inactive Dates in the Assign Peer Counselor pop-up affect the data in all of these reports.

See Chapter 7 for information about printing reports. All TWIST reports provide a blank screen to enter selection criteria for the report you want to run.

It will also display on these reports: Peer Counseling Client Participation and Breastfeeding Tracking Function Call Back.



**Figure 11: File Report Selection Criteria Screen for “PC Schedule for Participant Contacts” Report.**

🎵 **NOTE:** The Breastfeeding Peer Counseling Coordinator will print “**PC Schedule for Participant Contacts**” reports and give them to the peer counselors after participants are assigned in TWIST.

### ➔ **Practice Activities:**

Run a “PC Schedule for Client Contacts” for a specific peer counselor for this month.

1. Double click the “Reports” icon on “Select Modules” screen.
2. Select “Client Processes”.
3. Select “Reports”.
4. Select “Schedule for Client Contacts”.
5. Select a peer counselor.
6. Enter a “From” date of the first of this month and a “To” date of the last day of this month.
7. Click the “Run” icon.
8. Do not print report.