

## **Chapter 3: Client Processes**

### **Section 11: Family Summary Screen**

#### **Lesson: Family Summary Screen (FSS)**

#### **Objectives:**

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

- book appointments or make requests from the Family Summary Screen;
- limit the number of months' benefits to issue by setting issuance months;
- use the FSS to coordinate appointments for a family;
- select the months food benefits are to be issued; and
- remove issued food benefits if needed.

#### **Oregon Policies:**

- ◆ 511 Food Benefit Issuance
- ◆ 646 Mid-Certification Health Assessment
- ◆ 810 Nutrition Education: Making Education Available
- ◆ 820 Nutrition Education: Participant Contacts

#### **Overview:**

Nutrition Education is a primary focus of the WIC program and food benefit issuance should support attendance at Nutrition Education appointments. Food benefit issuance means that the foods from the food package assigned to the participant are sent to the family's eWIC account and are made available to purchase with their eWIC card.

The Family Summary Screen (FSS) provides you with information for all members of a family on WIC and can be accessed from a many different areas in TWIST. This screen will allow you to review appointments and food benefit issuance on a single screen. From a single location you will be able to make appointments or appointment requests and determine which months of food benefits to issue for a family. This process ensures that family appointments are coordinated with food benefit issuance and nutrition education opportunities are maximized.

#### **Instruction:**

#### **Accessing the Family Summary Screen**

The "Family Summary" Screen can be accessed in several different ways.

##### **From Certification:**

Client Processes ⇒ Certification ⇒ Food Package Assignment Tab

- Click on the "**Family Summary Screen**" button.

Client Processes - [CP3115 - Woman Certification State ID:3616063 Name: Omama, Michelle A DOB:01/01/1991]

File Edit Window Help

Selection

WIC ID: 02091879-01 Name: Omama, Michelle A DOB: 01/01/1991 WIC Cat.: WOMAN, MOSTLY OR SOME BREA Tr.Type: N

Medical Data  Health History  Diet Assessment  NE Plan  Progress Notes  BF Tracking  **Food Package Assignment**  Debug

**Food Package**

FP Start Date	WIC Category	Module A	Qty A	Unit A	Module B	Module C	Qty C	Unit C	Med Doc	Partial	Status
01/01/2015	WB	ML-C	4.75	gal	WPB					<input type="checkbox"/>	
12/01/2014	WB	ML-C	4.75	gal	WPB					<input type="checkbox"/>	
11/01/2014	WB	ML-C	4.75	gal	WPB					<input type="checkbox"/>	
10/01/2014	WB	ML-C	4.75	gal	WPB					<input type="checkbox"/>	
09/01/2014	WB	ML-C	4.75	gal	WPB					<input type="checkbox"/>	
08/01/2014	WB	ML-C	4.75	gal	WPB					<input type="checkbox"/>	
07/01/2014	WB	ML-C	4.75	gal	WPB					<input type="checkbox"/>	
06/01/2014	WB	ML-C	4.75	gal	WPB					<input type="checkbox"/>	
05/01/2014	WB	ML-C	4.75	gal	WPB					<input type="checkbox"/>	
04/01/2014	WB	ML-C	4.75	gal	WPB					<input type="checkbox"/>	
03/01/2014	WB	ML-C	4.75	gal	WPB					<input type="checkbox"/>	
02/11/2014	WB	ML-C	4.75	gal	WPB					<input type="checkbox"/>	

Modify FR and FX Med. Doc. Info Forecast Row Summary Special Client:  WBN1:  Twins or More:

Food Package Assignment Old Food Package Assignment

Enrollment Family Summary Screen Immunizations Status Change Transaction Type Determine Eligibility

**Figure 1: “Food Package Assignment” tab with Family Summary Screen button**

**From Lookup:**

Client Processes ⇒ Lookup ⇒ Family Summary Screen

**From Enrollment:**

Client Processes ⇒ Enrollment and Intake ⇒ Enrollment

- Fast Path to the **“Family Summary Screen.”**

**From Appointment Scheduler:**

Appointment Scheduler ⇒ Scheduling ⇒ Family Appointment Record or Daily Clinic Schedule ⇒ Fast Path to the Family Summary Screen

OR

Appointment Scheduler ⇒ Scheduling ⇒ Group Maintenance  
⇒ Group Education Classes

- Use the button Fast Path from a participant scheduled in the class to their **“Family Summary Screen.”**

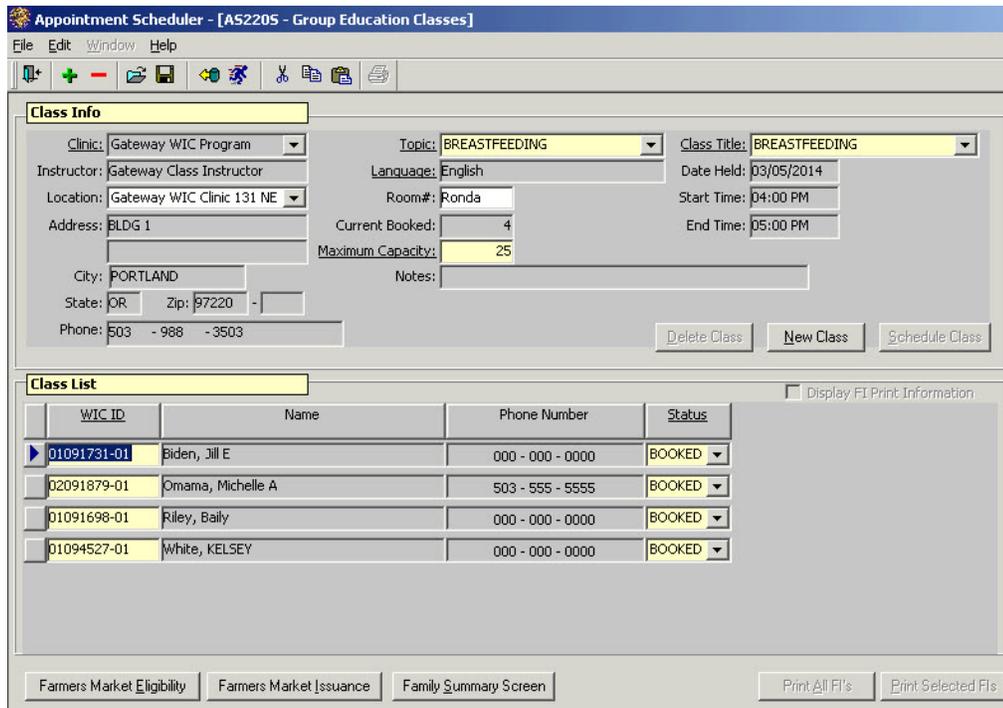


Figure 2: “Group Education” Screen with Family Summary Screen button

The “Family Summary Screen” has four major sections: Family Information; buttons for appointment scheduling and other functions; Appointments/Food Benefit Schedule; and buttons for issuing or removing food benefits and printing a Benefits List.

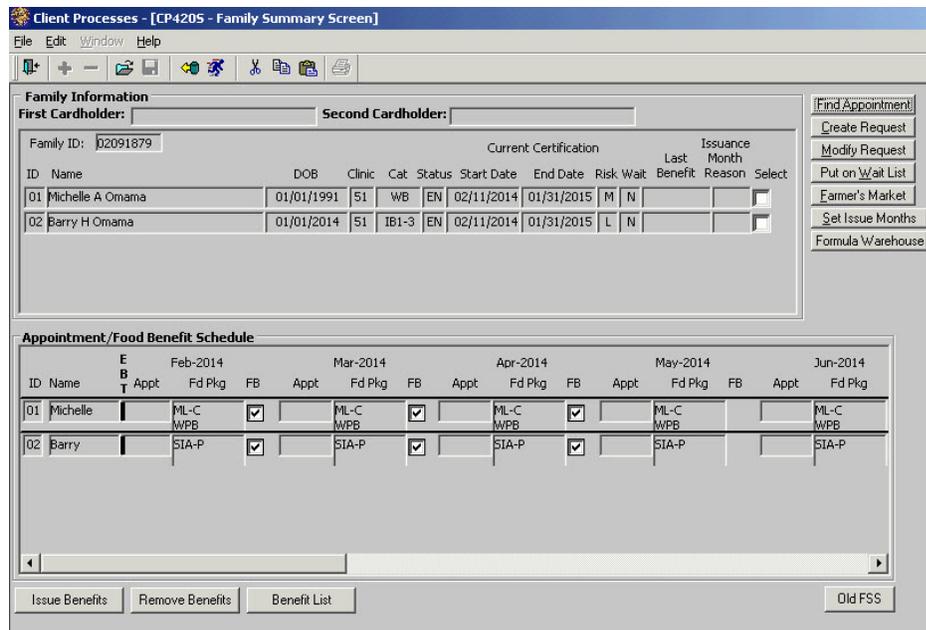


Figure 3: Family Summary Screen

## Family Information Section

☺ See Job Aid “Family Summary Screen Codes” for more information.

**Family Information**

First Cardholder:  Second Cardholder:

Family ID:

Current Certification

ID	Name	DOB	Clinic	Cat	Status	Start Date	End Date	Risk	Wait	Benefit	Last Month	Issuance Reason	Select
01	Michelle A Omama	01/01/1991	51	WB	EN	02/11/2014	01/31/2015	M	N				<input type="checkbox"/>
02	Barry H Omama	01/01/2014	51	IB1-3	EN	02/11/2014	01/31/2015	L	N				<input type="checkbox"/>

**Figure 4: “Family Information” Section**

This section of the screen displays all family members with WIC records and provides information that does not need to be displayed on a month-by-month basis.

1. **“Family Information” section fields.**
  - 1.1 **“First Cardholder”** and **“Second Cardholder”** fields indicate the names of cardholders entered on the **“Family Cardholder Screen.”** This lets you make sure the family has a cardholder assigned before they leave the clinic.
  - 1.2 **“Family ID”** field
  - 1.3 **“Client ID”** field
  - 1.4 **“Client Name”** field
  - 1.5 **“DOB”** field is the participants’ date of birth
  - 1.6 **“Clinic”** field indicates what clinic in your agency the participant is assigned to
  - 1.7 **“Cat”** field indicates the participant’s WIC category
    - An asterisk **“\*”** indicates if the WBN or IBN flag has been set on the **“Food Package Assignment”** screen.

- 1.8 “**Status**” field indicates the status of the current certification period: EN = Enrolled; IC = Incomplete Certification; and TM = Terminated. If the field is blank, there is no current cert period for the participant.
- 1.9 “**Start Date**” field indicates the start date for the current certification period.
- 1.10 “**End Date**” field indicates the end date for the current certification period.
- 1.11 “**Risk**” field indicates the risk level for that participant.
- 1.12 “**Wait**” field is a Yes(Y)/No(N) field indicating if the participant is currently on a waiting list in your agency.
- 1.13 “**Last Benefit**” field indicates the issue date for the month of benefits that is the furthest in the future
- 1.14 “**Issue Month Reason**” field shows the reason code indicating why the participant has less than three months of food benefits available to issue.
- 1.15 “**Select**” checkbox is used to select the participant for whom an action is to be taken, such as “Find Appointment.”

### ***Button Functionality***

On the right side of the “**Family Summary Screen**” is a series of buttons that allow the user to perform functions for participants without having to go to another screen.

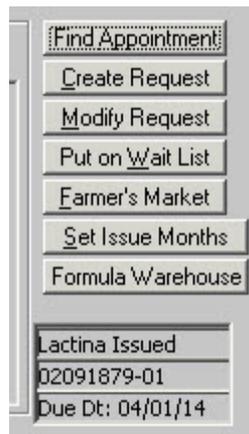


**Figure 5: Button Function Section**

1. **Select the participant(s) for whom you want to perform the function by checking a “Select” box.**
2. **Click on the button showing the function you wish to use.**
  - 2.1 “**Find Appointment**” button will open the “**Find Appointment**” pop-up and allows you to schedule an appointment for the participant(s) selected. See Chapter 4, Lesson 402, *Schedule Appointment Now* for more information.
  - 2.2 “**Create Request**” button will open the “**Create Request**” pop-up and allows you to schedule a request for the participant(s) selected. See Chapter 4, Lesson 301, *Appointment Requests* for more information.
  - 2.3 “**Modify Request**” button will open the “**Modify Request**” pop-up and allows you to remove or make changes to an existing request for the participant selected. See Chapter 4, Lesson 301, *Appointment Requests* for more information.
  - 2.4 “**Put on Wait List**” button will open the “**Put on Wait List**” pop-up and allows you place the participant selected on the wait list. See Chapter 4, Lesson 800, *Wait List* for more information.
  - 2.5 “**Farmer’s Market**” button will take you to the “**Farmer’s Market Issuance**” screen and allow you to issue Farmer’s Market Coupons for the participant(s) selected. See Chapter 3, Lesson 1000, *Farmers’ Market Coupon Issuance* for more information.
  - 2.6 “**Set Issue Months**” button opens the “**Set Issue Months**” pop-up which allows you to limit the number of months the system will allow to be issued for the participant selected. See the “*Selecting Food Benefits to Issue*” section of this lesson for more information.
  - 2.7 “**Formula Warehouse**” button opens the “**Formula Warehouse**” pop-up which allows you to submit formula orders to the formula warehouse to be filled. An “!” on the “**Formula Warehouse**” button indicates that a formula warehouse order has been placed. See Chapter 3, Lesson 505, *Formula Warehouse* for more information.

♪ NOTE: These buttons will help the user to coordinate appointments and other participant services needed for all family members on WIC. See the “*Appointment/Food Benefit Schedule*” section of this lesson for more information.

3. **View Breast Pump Issuance information below the buttons.**



**Figure 6: Breast Pump Issuance Information**

♪ NOTE: This information is only visible if a Lactina or Pump-In-Style breast pump has been issued to the participant. It includes the WIC ID of the family member who was issued the breast pump. If a Lactina is issued, the date the breast pump is due to be returned is also displayed. See Chapter 3, Lesson 600, *Breastfeeding Tracking* for more information.

**Appointment/Food Benefit Schedule Section**

The bottom section of the “**Family Summary Screen**” shows the appointments, milk, food or formula modules that have been assigned, and availability to issue food benefits for all participants on WIC. This section allows the user to ensure participation in the appropriate Nutrition Education for the family and will be the primary method of determining which food benefits will be issued for the family.

Appointment/Food Benefit Schedule																
ID	Name	E B T	Feb-2014			Mar-2014			Apr-2014			May-2014			Jun-2014	
			Appt	Fd Pkg	FB	Appt	Fd Pkg	FB	Appt	Fd Pkg	FB	Appt	Fd Pkg	FB	Appt	Fd Pkg
01	Michelle		ML-C WPB	<input checked="" type="checkbox"/>												
02	Barry		SIA-P	<input checked="" type="checkbox"/>												

**Figure 7: “Appointment/Food Benefit Schedule” Section**

1. **Review the fields in the “Appointment/Food Benefit Schedule” section of the screen.**
  - 1.1 “ID” field shows the participant ID for each family member.

- 1.2 “**Name**” field shows the first name for each family member.
- 1.3 “**Month-Year**” indicator shows the month and year of the appointment and food package directly below it. Using the scroll bar beneath will show up to a full year for each participant.
- 1.4 “**Appt**” field shows the code for the appointment type of the first appointment or request in the month indicated. Requests are indicated by a small “-r” after the appointment type code. For more information about the participants appointments or to reschedule, Fast Path to the “**Family Appointment Record.**”

☺ See Job Aid “Appointment Types” for more information.

- 1.5 “**Fd Pkg**” field indicates what milk, food or formula modules have been assigned for the month indicated. Food package assignment must take place on the “**Food Package Assignment**” screen.
- 1.6 “**FB**” field shows the status and availability for issuing the food benefits indicated for that month.
- 1.7 The space between months may show the Certification End or Termination. No food packages will show beyond this bar.
  -  A solid black bar shows when a participant becomes categorically ineligible.
  -  A hollow bar shows when the participant’s current certification period ends.

### Selecting Food Benefits to Issue

The “**Family Summary Screen**” allows you to select the months of food benefits to issue for each family member eligible to receive benefits. This process would be used to coordinate food benefit issuance with participant appointments. The system defaults to 3 months of food benefits available to issue. The system will automatically limit the number of months available to issue for participants with eligibility pending, requiring medical documentation from a health professional, or if a breastfeeding mom and baby have mismatched categories. The user can limit the number of months available to issue via the “**Set Issue Months**” function.

If there is no Food Package code in the “**Fd Pkg**” field, there cannot be any food benefits issued for that month. Any food benefits that are available to be issued for a participant will default to a checked box in the “**FB**” field.

☺ See Job Aid “Considerations for Scheduling and Benefits Issuance” for more information.

Appointment/Food Benefit Schedule																
ID	Name	E B T	Feb-2014			Mar-2014			Apr-2014			May-2014			Jun-2014	
			Appt	Fd Pkg	FB	Appt	Fd Pkg									
01	Michelle		ML-C WPB	<input checked="" type="checkbox"/>		ML-C WPB	<input checked="" type="checkbox"/>		ML-C WPB	<input checked="" type="checkbox"/>		ML-C WPB	<input checked="" type="checkbox"/>		ML-C WPB	
02	Barry		SIA-P	<input checked="" type="checkbox"/>		SIA-P	<input checked="" type="checkbox"/>		SIA-P	<input checked="" type="checkbox"/>		SIA-P	<input checked="" type="checkbox"/>		SIA-P	

**Figure 8: Checked FB boxes**

- To limit the number of months to issue, clicking on the box will uncheck the box in the “FB” field.**

Appointment/Food Benefit Schedule																
ID	Name	E B T	Feb-2014			Mar-2014			Apr-2014			May-2014			Jun-2014	
			Appt	Fd Pkg	FB	Appt	Fd Pkg									
01	Michelle		ML-C WPB	<input checked="" type="checkbox"/>		ML-C WPB	<input checked="" type="checkbox"/>		ML-C WPB	<input checked="" type="checkbox"/>		ML-C WPB	<input checked="" type="checkbox"/>		ML-C WPB	
02	Barry		SIA-P	<input checked="" type="checkbox"/>		SIA-P	<input type="checkbox"/>		SIA-P	<input type="checkbox"/>		SIA-P	<input type="checkbox"/>		SIA-P	

**Figure 9: Unchecked FB boxes**

- Codes in the “FB” field will give the reason checked FB boxes are not available.**
  - R = Medical Documentation required
  - E = Eligibility Pending
  - BI = Benefits have been issued
  - M = Mismatched category or designation between mom and baby

Appointment/Food Benefit Schedule																	
ID	Name	E B T	Feb-2014			Mar-2014			Apr-2014			May-2014			Jun-2014		
			Appt	Fd Pkg	FB	Appt	Fd Pkg	FB	Appt	Fd Pkg	FB	Appt	Fd Pkg	FB	Appt	Fd Pkg	
01	Michelle		ML-C WPB		<input checked="" type="checkbox"/>		ML-C WPB	E		ML-C WPB	E		ML-C WPB	E		ML-C WPB	
02	Barry		SIA-P		<input checked="" type="checkbox"/>		SIA-P	E		SIA-P	E		SIA-P	E		SIA-P	

Figure 10: Codes in the “FB” field

### Set Issue Months

3. Select a participant and then click the “Set Issue Months” button.

Figure 11: “Set Issue Months” pop-up

♪ NOTE: Setting the issue months will limit the months of food benefits available to issue for that participant anytime the participant is accessed on the “**Family Summary Screen**”. The issue months reason must be removed to return to the default of 3 months of food benefits available to issue.

4. Select the number of “Months Allowed” from the drop down.
5. Select the “Reason” from the drop down.
6. Click “OK.”

### Removing Issue Months

7. After selecting a participant and opening the “Set Issue Months” pop-up, click the “Remove” button.

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## **Coordinating Family Appointments**

There are several ways appointments and issuing food benefits can be coordinated.

### **Changing Certification End Dates**

Participants in certain categories may have their cert end dates modified so that recert appointments coincide with other appointments.

1. **Select the participant whose certification dates you wish to change.**
2. **Fast Path from the “Family Summary Screen” to “Enrollment”.**
3. **Change the “Cert End Date” field.**
  - 3.1 Open the “**Food Package Assignment**” screen to save the changes to the food package for a shortened certification or to add a food package assignment month for a lengthened certification.
4. **Return to the Family Summary Screen.**

### **Food Benefit Issuance**

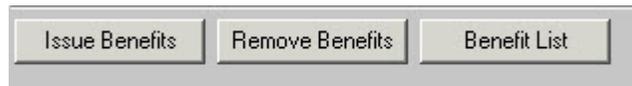
Participants in the same family may have different number of months worth of food benefits available to issue. Uncheck the FB check boxes for months after the next scheduled appointment as needed to ensure the participant attends their next scheduled appointment.

### **Coordinating Appointment Requests**

Appointment requests for 2<sup>nd</sup> Nutrition Education appointments or mid-cert health assessments may be modified to occur in the same months for all family members.

1. **Select the participant whose appointment requests are to be modified.**
2. **Click the “Modify Request” button.**
3. **Make the necessary changes to the request.**
4. **Click “OK.”**

## ***Benefit Issuance Functions***



**Figure 12: Food Benefit Issuance Buttons**

1. **Click the “Issue Benefits” button to issue food benefits with boxes checked.**

♪ NOTE: Food benefits are sent directly to the eWIC banking contractor when this button is clicked. This process may take a few seconds. During the wait, you will see a message near the buttons that reads “Issuing benefits. Please wait.” Once food benefits are issued, the check box is replaced with “BI”.

2. **Click the “Benefits List” button to go to the “Benefits List”.**

♪ NOTE: Go to Chapter 3, Lesson 1101, *Benefits List* for more information on the Benefits List.

## ***Remove Benefits Function***

This function would be used to remove the participant’s issued food benefits from the family’s eWIC account. Removing the benefits does not affect food package assignment. You do not need to remove issued benefits in order to change the food package assignment. Once removed, the FB check box will return and the food benefits can be re-issued at any time.

1. **Click the “Remove Benefits” button to open the “Remove Benefits” pop-up.**

BI150 - Remove Benefits

Remove Benefits

For family: 2091879

ID	Name	Feb-2014		Mar-2014		Apr-2014	
		FB	Remove?	FB	Remove?	FB	Remove?
01	Michelle	BI	<input type="checkbox"/>	BI	<input type="checkbox"/>	BI	<input type="checkbox"/>
02	Barry	BI	<input type="checkbox"/>	BI	<input type="checkbox"/>	BI	<input type="checkbox"/>

Void Reason

Select All

Save Cancel

Figure 13: “Remove Benefits” pop-up

2. Review the fields on the “Remove Benefits” pop-up.
  - 2.1 “For Family” field indicates the family ID number / eWIC account number for the family.
  - 2.2 “ID” field shows the participant ID for each family member.
  - 2.3 “Name” field shows the first name for each family member.
  - 2.4 “Month-Year” indicator shows the month and year the food benefits directly below it were issued.
  - 2.5 “Remove?” field shows a check box for each month of issued food benefits that are eligible to be removed.

♪ NOTE: Issued food benefits cannot be removed if any portion has been spent. You will not be able to remove benefits for family members receiving a common category of food if any of that common category of food has been spent.

♪ NOTE: If benefits are not available to be removed there will be no FB code and the check box will be grayed out.

		Feb-2014		Mar-2014		Apr-2014	
ID	Name	FB	Remove?	FB	Remove?	FB	Remove?
01	Michelle	BI	<input type="checkbox"/>	BI	<input type="checkbox"/>	BI	<input type="checkbox"/>
02	Barry		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>

Figure 14: “Remove Benefits” pop-up with grayed out check boxes

3. **Select the check box for the months of food benefits that you want to remove.**
  - 3.1 Clicking the “**Select All**” button will check all available food benefit check boxes for removal.
4. **Select the reason you are removing the benefits from the “Void Reason” drop down.**
5. **Click “Save” to remove the selected food benefits or click “Cancel” to close the pop-up without removing any food benefits.**

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** Tips and Shortcuts:**

 **See Job Aid “Family Summary Screen Codes” for more information.**

- There are Fast Paths to the FSS from many different participant screens. Fast Paths from the FSS are:
  - Certification, Infant/Child
  - Certification, Temp Newborn
  - Certification, Woman
  - Client Master Demographics
  - Complaints
  - Daily Clinic Schedule
  - Enrollment
  - Family Appointments
  - View Client Status
- If a participant has both requests and appointments for one month, the system will display the first non-GE appointment for the month.
- There is no “Save” functionality on the FSS except for actions taken using one of the buttons. Removing a check in the “FB” field will not be saved when you leave the screen.

** Notes**

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