

**Chapter 3: Client Processes**  
**Section 3: Assessment**  
**Lesson: Risk Criteria and Risk Level**

**Objectives:**

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

- assign, adjust, and assess risk and sub-risk factors;
- explain how priorities are computed;
- identify and delete inapplicable computer-assigned risk factors; and
- correctly demonstrate how and when to change the risk level field.

**Oregon Policies:**

- ◆ 657 Migrant Workers: Definition
- ◆ 670 Risk Criteria: Overview
- ◆ 675 Risk Criteria Codes and Descriptions

**Overview:**

All clients must have a health or nutrition-related risk to meet eligibility requirements. TWIST assists you in identifying risks and allows you to add or delete risks as needed. TWIST compares information you enter into the system to base table data and assigns risk(s) based on this information.

Once risks have been assigned, TWIST determines the priority and risk level of the client. Now you will have more time to talk to clients and help them develop goals and an action plan.

Remember, TWIST does have limitations – it is only a computer program. You should review all risk assignment information and add or remove risks as needed.

In this lesson you will learn to review system-assigned risks, assign non-system generated risks, and remove risks that are not applicable to a client.

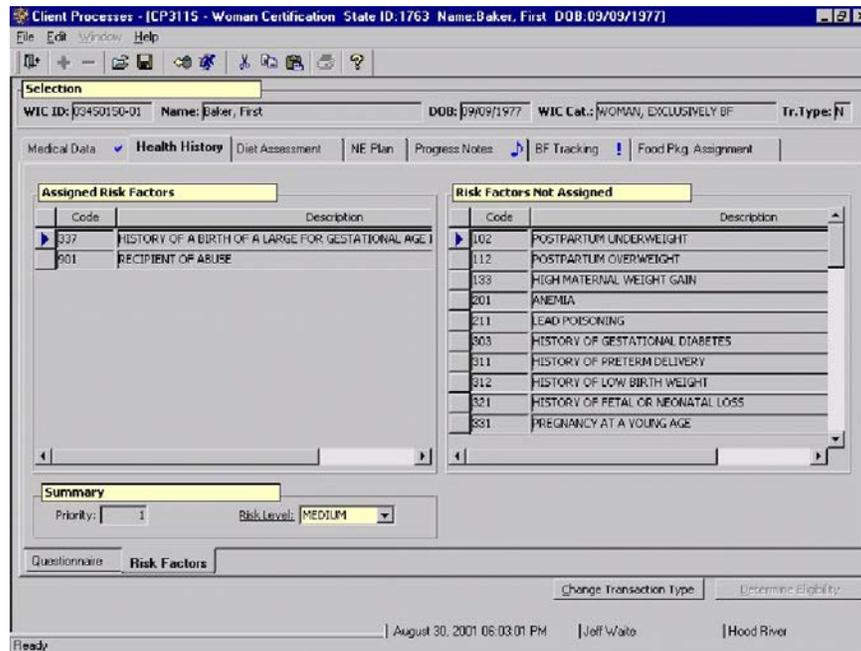
**Instruction:**

**Assigning and Deleting Risk(s)**

The starting point for this section is:

Client Processes ⌚ Certification ⌚ Woman ⌚ Health History

1. Retrieve the client for whom you want to enter risk information.
2. Click on the “Risk Factors” sub-tab in the lower left hand corner.



**Figure 1: “Risk Factors” Screen**

- The screen is divided into three sections “Assigned Risk Factors,” “Risk Factors Not Assigned,” and “Summary.”
- Any system-assigned or manually assigned risk will be displayed on the left hand side of the screen in the “Assigned Risk Factors” section.
- System-assigned risks will be bold.
- All of the potential risks that the client may have, based on their category, are displayed on the right hand side of the screen in the “Risk Factors Not Assigned” section.

**See Job Aids on “Risk List for Women” and “Risk List for Infants and Children” for more information.**

3. Click in the first row in the “Risk Factors Not Assigned” section.

You can use the down arrow key or the scroll bar to the right to move up or down the list.

4. **Select the risk you want to assign by double-clicking on the risk.**
  - The risk is moved to the “Assigned Risk Factors” section.
  - To delete a risk, double click on a selection in the “Assigned Risk Factors” section. The risk is moved back to the other column.

☒ NOTE: A risk factor can be moved between columns by double clicking on it.

5. **Save.**

The “Priority” field in the “Summary” section is system-generated and is calculated based on category and risk.

6. **Tab to the “Risk Level” field.**
  - This field defaults to the level established in the base tables but can be changed.
  - The staff assigned to each risk level is determined by policy and the coordinator.

7. **Change risk level by clicking on a selection from the drop down list.**

8. **Save.**

9. **Exit.**

### ***Tips and Shortcuts:***

- You may assign any appropriate risk factor to a client.
- If you remove a system-assigned risk and then add it back, it will no longer be bold.
- You may delete any risk factor assigned by the system.
- This process is the same in both the “Health History” and “Diet Assessment” tabs.

### ***Practice Activity:***

Use the information from your Activity Sheet for this practice.

The starting point for this section is:

Client Processes ⇄ Certification ⇄ Woman ⇄ Health History

1. Access “Client Primary” and return to the “Health History” screen with your client.

2. Click on the “Risk Factors” tab in the lower left hand corner.
3. Click in the first row on the “Risk Factors Not Assigned” section.
4. Select risk 334 – **Lack of or Inadequate Prenatal Care**.
5. Double click to assign the risk.
6. Select risk 372 – **Alcohol or Illegal and/or Illicit Drug Use**.
7. Double click to assign the risk.
8. Click in the first row of the “Assigned Risk Factors” section.
9. Double click on **Alcohol or Illegal and/or Illicit Drug Use** to remove the risk.
10. Save.
11. Tab to the “Risk Level” field.
12. Change the risk to **medium**.
13. Exit back to “Client Processes.

### **Skill Check:**

Certify a new prenatal client. Once the certification is complete, retrieve the client and open the “Risk Factor” screen. Make the following changes to your client’s risk information.

7. Add risk 343 – **Diabetes Mellitus**.
8. Delete risk 334 – **Lack of or Inadequate Prenatal Care**.
9. Add risk 359 – **Recent Trauma, Burns or Surgery**.
10. Change Risk Level to **High**.

Once you have entered the information, save your work and *do a screen print of the “Risk Factors” screen*. Write your name on the screen print before you turn it in to the instructor.

### **Notes:**

## **Chapter 3: Client Processes**

### **Section 3: Assessment**

#### **Lesson: Anthropometric / Biochemical for a Woman**

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

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

- enter data in the Woman Medical Data screen;
- summarize how medical data is utilized by the TWIST system;
- open and view Woman graphs;
- identify when to use “9s” as the unknown value for anthropometric or biochemical values.

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

- ◆ 625 Nutritional Risk Assessment

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

Collecting, documenting and assessing anthropometric and biochemical data is an important part of every certification.

TWIST will compare anthropometric and biochemical data to established standards to determine if a participant is at risk. TWIST will plot anthropometric data on the appropriate grids and identify anthropometric or biochemical risks.

In this lesson you will learn how to document anthropometric and biochemical information and view the prenatal weight gain grids for women.

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

##### ***Entering Anthropometric Data***

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Medical Data

1. Retrieve the participant for whom you want to enter anthropometric/biochemical data.

The screenshot displays the 'Medical Data' screen in the 'Client Processes - [CP3115 - Woman Certification]' application. The interface includes a menu bar (File, Edit, Window, Help) and a toolbar. The 'Selection' section at the top contains fields for WIC ID, Name, DOB (00/00/0000), WIC Cat., and Tr. Type. Below this is the 'Medical Data' section with tabs for Health History, Diet Assessment, NE Plan, Progress Notes, BF Tracking, and Food Pkg. Assignment. The 'Anthropometry' section features a table with the following data:

Collection Date	Prenatal / Postpartum	Current Weight			Height			Weeks Gest.	Cumul. Wt Gain/Loss	BMI	Medical Notes
		E/M	LBS	OZ	E/M	Inch	1/8				
00/00/0000		ENGLISH	0	0	ENGLISH	0	0	0	0	0.00	

The 'Prenatal' section includes fields for EDD (00/00/0000), LMP (00/00/0000), a 'Twins or More' checkbox, and 'Pre Pregnancy Weight' (ENGLISH, 0 LBS, 0 OZ) and 'Prepregnancy BMI' (0.00). The 'Biochemical Info' section contains a table with the following data:

Collection Date	Prenatal/ Postpartum	Hemoglobin	Hematocrit	Weeks Gest.	Blood Lead Level
00/00/0000		.00	.00	0	0.0

Buttons for 'Insert', 'Remove', and 'View Graph' are located at the bottom of the data tables. The Windows taskbar at the bottom shows the date and time as January 24, 2003 02:26:08 PM.

Figure 1: "Medical Data" Screen

2. Enter the date the height and weight were collected in the "Collection Date" field.
  - This field defaults to the current date but may be changed.
  - The correct format is MM/DD/YYYY.
  - A certification will only be marked complete if a date not more than 60 days in the past has been entered.
  - Historical data may be entered.
  - Use the "Insert" icon to add additional rows.
3. Tab to the "Prenatal/Postpartum" field and select the appropriate choice from the drop down list.
4. In the "E/M" field in the "Current Weight" section, select the unit of measure from the drop down list.
  - This field defaults to English.
  - If English is selected, weight is entered in pounds and ounces.
  - If Metric is selected, weight is entered in kilograms and grams.

- TWIST saves the data in English and defaults to English when the screen is accessed.
- For an unknown value, fill the “**lbs**” field with all 9s.

5. **Enter the participant’s weight.**

6. **In the “E/M” field in the “Height” section, select the unit of measure.**

- This field defaults to English.
- If English is selected, height is entered in inches and eighths of an inch.
- If Metric is selected, height is entered in centimeters and millimeters.
- TWIST saves the data in English and defaults to English when the screen is accessed.
- For an unknown value, fill the “**inches**” field with all 9s.

7. **Enter the participant’s height.**

♪ NOTE: “**Weeks Gest.**,” “**Cumul. Wt Gain/Loss**,” and “**BMI**” are system generated fields after all the mandatory data fields are completed.

- “**Weeks Gest.**” is calculated from collection date and the EDD.
- “**Cumul. Wt Gain/Loss**” is the calculated from most current weight and prepregnancy weight.
- “**BMI**” is calculated from current weight and height and displays for non-pregnant women.

8. **In the “Medical Notes” field, double click to open the “Woman Anthropometry Notes” pop-up.**

- Notes may be entered in a free-form text format.
- Click “**OK**” to save note and close pop-up.
- Click “**Cancel**” to close pop-up without saving note.

♪ NOTE: Information cannot be saved until all mandatory fields on this screen are filled. After the information on the screen has been saved, data entered may be modified until the End of Day process has occurred. After End of Day, data entered becomes display only and cannot be removed or changed. If the information was entered incorrectly, insert a new row using the “**Insert**” icon to enter the correct information.

### ***Entering Prenatal Data***

These fields will be displayed for prenatal participants only.

1. **Verify the dates in the “EDD” and “LMP” fields are correct.**
  - These fields are display only.
  - To modify these dates, you must enter the revised information on the “**Intake**” screen.
2. **Click the “Twins or More” box for a woman with a multiple fetus pregnancy.**
3. **Tab to the “Pre Pregnancy Weight” row.**
  - English is the default choice.
  - If English is selected enter prepregnancy weight in pounds and ounces.
  - If metric is selected entered prepregnancy weight in kilograms and grams.
  - The system will calculate the “**Prepregnancy BMI.**”

### ***Entering Postpartum Data***

These fields will be displayed for postpartum participants only.

1. **Enter the participant’s “ADD” (Actual Delivery Date) on the “Intake” screen.**
2. **Enter the participant’s “EDD” (Estimated Delivery Date) on the “Intake” screen.**

TWIST will calculate weeks gestation based on ADD and EDD.

3. **Enter the “Total Weight Gain for the Pregnancy Just Completed” on the Medical Data screen.**
  - English is the default choice.
  - If English is selected enter weight in pounds and ounces.
  - If metric is selected entered weight in kilograms and grams.
4. **If needed, enter “Weight Before Last Pregnancy.”**
  - If client was enrolled during pregnancy, this field will be automatically filled in from her prenatal data.

- “**BMI Before Last Pregnancy**” will be calculated from this field and Height.

### **Entering Biochemical Data**

1. **Enter the date the blood work was collected in the “Collection Date” field.**

- This field defaults to the current date but may be changed.
- The correct format is MM/DD/YYYY.
- Historical data may be entered.
- A certification will only be marked as complete if a date not more than 60 days in the past has been entered.

2. **Enter the hemoglobin or hematocrit value for the client.**

- You may enter both a hemoglobin and hematocrit value, but you must enter one or the other.
- For an unknown value, fill the field with all 9s.
- If a hemoglobin value less than 5.0 or greater than 18.0 is entered or if a hematocrit value less than 20.0 or greater than 56.0 is entered, a warning message will pop-up. To close the pop-up click “OK.”

♪ NOTE: The “**Weeks Gest.**” field is system generated and calculated from the “**Collection Date**” and “**EDD.**”

3. **Tab to the “Blood Lead Level” field and enter the blood lead level value.**

This field is optional but is used in risk identification.

4. **Save.**

- Click the “**Insert**” button to add additional rows for biochemical data.
- Click the “**Remove**” button to remove a row of data prior to it being saved.
- Once data has been saved TWIST will compare the client’s data to the established standards and auto-assign any appropriate risks.

### **Viewing the Graphs**

1. **Click the “View Graph” button.**

The graph screen is displayed after data is saved.

2. **Select the appropriate graph from the “Select Graph” drop down list.**

- For pregnant women, the system will select the appropriate prenatal weight gain graph to use based on the woman’s prepregnancy BMI. The four graph options are Underweight, Standard Weight, Overweight and Obese.
- When the “Twins or More” box is checked, multifetal weight gain graphs will be available for viewing. The appropriate prenatal weight gain graph will be selected based on the woman’s prepregnancy BMI. The four multifetal graph options are Underweight, Standard Weight, Overweight and Obese.

3. **View graph.**

4. **Click the “Print Graph” button to print the graph.**

5. **Click the “Close” button to return to the “Medical Data” screen.**

### **Tips and Shortcuts:**

- To add a row to the “Anthropometry” section, click the “Insert” icon.
- When data has been entered in metric, click the “Refresh” icon to view it in English.
- If a value is entered that is not within “normal” parameters a warning message will be displayed stating the value is not with the established range. Click “OK” to close the message pop-up. You are not required to change the value.
- If an incorrect value is entered for height, weight, hematocrit or hemoglobin and saved, the system will assign risk based on the incorrect value and will not remove the risk even if the value is later corrected. Always check the “Risk Factors” tab for accurate risk factor assignment and add or remove risks as needed,
- When placeholder values are entered for weight and height, TWIST is unable to calculate cumulative weight gain or loss, BMI, or plot a client’s data on a grid.
- Use the notes field to record refusal for collecting anthropometric or biochemical data.

### **Practice Activities:**

Use the information from your  Activity Sheet for this practice.

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Medical Data

1. Click the “Open” icon to access “Client Search” and select your participant.
2. Click the “Return with Client” button to return to the “Medical Data” screen.
3. Click in the “Collection Date” field and enter a date three months ago.
4. Tab to the “Prenatal/Postpartum” field and select “Prenatal.”
5. Tab to the “Current Weight” section and enter your weight in pounds and ounces.
6. Tab to the “Height” section and enter your height in inches and eighths of an inch.
7. Tab to the “Medical Notes” field and enter a note.
8. Click “OK” to save note.
9. Tab to “Pre Pregnancy Weight” row and enter your ideal weight in pounds and ounces.
10. Tab to the “Biochemical Info - Collection Date” field and enter a date three months ago.
11. Tab to the “Hemoglobin” field and enter 9.9.
12. Save your work.
13. Click the “View Graph” button to view your graphs.
14. Close the graph screen and exit back to the “Client Processes” window.

Great job! You have just completed the “Medical Data” screen. Let’s move on to the Skill Check to review the process one more time.

### ✓ **Skill Check:**

Continue with your participant’s new enrollment by entering her anthropometric and biochemical information. The following are the values that you collected today at her WIC appointment.

Height – 63 inches  
Current Weight – 162 pounds  
Pre-pregnancy Weight – 149  
EDD – 4 months from today  
Hematocrit – 34

*Print her gestational weight gain grid to turn into your instructors.*

### **Notes:**

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## **Chapter 3: Client Processes**

### **Section 3: Assessment**

#### **Lesson: Anthropometric/Biochemical for an Infant/Child**

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

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

- enter and interpret data in the Infant/Child Medical Data screen;
- summarize how medical data is utilized by the TWIST system;
- explain and utilize Infant/Child graphs; and
- interpret and identify when to use “9s” as the unknown value for anthropometric or biochemical values.

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

- ◆ 625 Nutritional Risk Assessment
- ◆ 626 Hemoglobin and Hematocrit Screening in WIC
- ◆ 628 Anthropometric Screening

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

Collecting, documenting, and assessing anthropometric and hematological data is an important part of every certification.

TWIST will compare the participant’s height, weight and blood work data to established standards and assign risks based on this information. In addition, TWIST will, plot anthropometric data on the appropriate growth charts.

In this lesson you will learn how to document anthropometric and hematological information and view the graphs for infants and children.

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

##### ***Entering Anthropometric Data for an Infant/Child***

The starting point for this lesson is:

Client Process ⇒ Certification ⇒ Infant/Child ⇒ Medical Data

1. **Retrieve the client for whom you wish to enter anthropometric and/or biochemical information.**

Figure 1: “Medical Data” Screen

2. **Enter the date the height and weight were collected in the “Collection Date” field.**
  - This field defaults to the current date, but may be changed.
  - The correct format is MM/DD/YYYY.
  - Historical data may be entered back to the client’s birthdate.
  - Use the “Insert” icon to add additional rows.
  - A certification will only be marked complete if a date not more than 30 days in the past has been entered.
  
3. **In the “E/M” field in the “Weight” section, select the unit of measure from the drop down list.**
  - This field defaults to English.
  - If English is selected, weight is entered in pounds and ounces.
  - If Metric is selected, weight is entered in kilograms and grams.
  - TWIST saves the data in English and defaults to English when the screen is accessed.
  - For an unknown value, fill the “lbs” field with all 9s.
  
4. **Enter the client’s weight.**

The “Weight for Age” field is calculated by the system and displays the weight for age percentile after the data is saved.
  
5. **In the “E/M” field in the “Length/Height” section, select the unit of measure.**

- This field defaults to English.
- If English is selected, length/height is entered in inches and eighths of an inch.
- If Metric is selected, length/height is entered in centimeters and millimeters.
- TWIST saves the data in English and defaults to English when the screen is accessed.
- For an unknown value, fill the inches field with all 9s.

6. **Enter the client's length/height.**

7. **Select how the client was measured, recumbent (lying down) or standing, from the drop down list in the "R/S" field.**

- This field defaults to recumbent for children less than 2 years of age.
- This field defaults to standing for children over 2 years of age. The field may be manually changed to recumbent for children who are unable to stand for a height measurement.

The "**Length/Ht for Age**," "**Weight for Ht**" and "**BMI**" fields are calculated by the system and display the length/height for age, weight for height percentiles, BMI and BMI percentiles after the data is saved.

8. **Click the "Birth Data" box if the weight and length/height information entered is the client's birth data.**

♪ NOTE: If no birth information is entered for clients up to 2 years of age, a message will pop-up stating "There is no birth information entered for this client. Would you like to enter it now?" Click "Yes" if you want to enter the birth information. Click "No" to close the pop-up.

9. **In the "Medical Notes" field, double click to open the "Infant/Child Anthropometry Notes" pop-up.**

- Notes may be entered in a free-form text format.
- Click "OK" to save the note and close the pop-up.
- Click "Cancel" to close the pop-up without saving the note.

♪ NOTE: Information cannot be saved until all mandatory fields on this screen are filled. After the information on the screen has been saved, data entered becomes display only and cannot be removed or changed after the date of original entry.

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**Entering Hematological Data for an Infant/Child****1. Enter the date the blood work was collected in the “Collection Date” field.**

- This field defaults to the current date but may be changed.
- The correct format is MM/DD/YYYY.
- Historical data may be entered back to the client’s birth date.
- A certification will only be marked as complete if a date not more than 60 days in the past has been entered.

**2. Enter the hemoglobin or hematocrit value for the client.**

- You may enter both a hemoglobin and a hematocrit value.
- For an unknown value, fill the field with all 9s.
- If a hemoglobin value less than 5.0 or greater than 18.0 is entered or if a hematocrit value less than 20.0 or greater than 56.0 is entered, a warning message will pop-up. To close the pop-up click “OK.”

**3. Enter the blood lead level value if available.**

This field is optional.

**4. Save.**

- Click the “Insert” button to add additional rows for hematological data.
- Click the “Remove” button to remove a row of data prior to the end of the day when the data is entered.

**Entering Head Circumference Data for an Infant/Child**

The fields in this section are similar to the “Anthropometric” and “Biochemical” sections of the Medical Data Screen.

**1. Enter the date the head circumference measurement was made.****2. Select the unit of measure from the “E/M” drop down list.****3. Enter the client’s head circumference value.****4. Save.**

- Click the “Insert” button to add additional rows for head circumference data.

- Click the “Remove” button to remove a row of data prior to the end of the day when the data is entered

### ***Viewing the Graphs***

1. **Click the “View Graph” button.**
  - Graphs are available for viewing after length or height and weight measurements are entered and saved on the Medical Data screen.
  - Plot points will appear as dots or Xs. X is used to indicate that a recumbent measurement has been plotted on a standing graph for children over age 2 years.
  - To enlarge the graph viewing area click the “Maximize” button.
  - To return the graph viewing area to the original size click the “Minimize” button.
  -
2. **Select the appropriate graph from the “Select Graph” drop down list.**
  - See the TWIST “Growth Chart” job aid for a list of graphs that are available in TWIST at each age.
  - Scroll down to see the graph.
  - Additional graphs can be viewed by returning to the select graph drop down.
3. **Click the “Print Graph” button to print a specific graph.**
4. **Click the “Print All Graphs” button to print all the graphs.**
5. **Click the “Close” button to return to the “Medical Data” screen.**

### ***Viewing Adjusted Age Graphs***

In order for premature infants anthropometric data to plot for adjusted age, information must be entered into the “Gestational Age Adjust” pop-up. The information is also used to determine system generated risks related to prematurity. This pop-up would only be completed for infants and children up to two years of age.

1. Click the “Gestational Age Adjust” button.

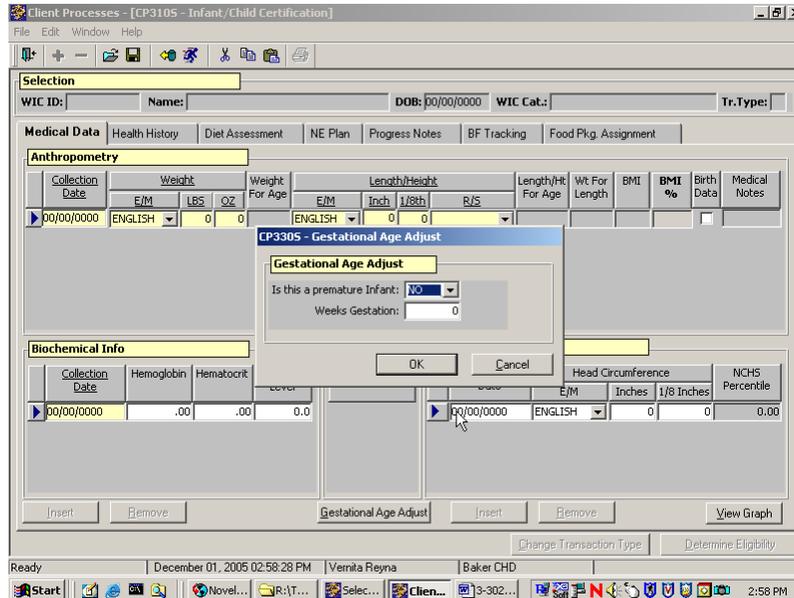


Figure 2: “Gestational Age Adjust” Pop-Up

2. Select yes or no from the drop down list in the “Is this a premature infant” field.
  - This field defaults to no.
  - When yes is selected, the “**Weeks Gestation**” field becomes mandatory.
3. Enter the weeks gestation at birth.
4. Click “OK” to save the information and close the pop-up.  
Click “Cancel” to close the pop-up without saving the information.
5. Click the “View Graph” button.
  - To enlarge the graph viewing area click the “Maximize” button.
  - To return the graph viewing area to the original size click the “Minimize” button.
6. Select the appropriate graph from the “Select Graph” drop down list.

- Age adjusted graphs, Length for Age and Weight for Age, will only be available for premature infants whose weeks gestation were entered in the “Gestational Age Adjust” pop-up.
8. **Click the “Print Graph” button to print a specific graph.**
  9. **Click the “Print All Graphs” button to print all the graphs.**
  10. **Click the “Close” button to return to the “Medical Data” screen.**

### **✂ Tips and Shortcuts:**

- You must save the data entered before you can access the “Gestational Age Adjust” pop-up.
- When placeholder values (9s) are entered for weight or length/height, TWIST is unable to calculate weight for age, length/height for age, weight for height, and BMI.
- When anthropometric and hematological values meet a risk criteria definition, TWIST will generate the appropriate risk.
- If a value is entered that is not within “normal” parameters a warning message will be displayed stating the value is not within the established range. This message is intended to prevent incorrect values being entered. You are not required to change the value. Click “OK” to close the message pop-up.
- Use the notes field to record refusal for collecting anthropometric or hematological data.
- Age adjusted graphs are available for premature infants up until 2 years of age.

### **↪ Practice Activity:**

Use the information from your 📄 Activity Sheet for this practice.

1. Select “Certification” from the menu bar.
2. Select ‘Infant/Child’ and then “Medical Data” from the drop down menus.
3. Retrieve the client for which you wish to enter medical data.
4. Enter the date in the “Collection Date” field for “Anthropometry.”
5. Select English or Metric from the “E/M” drop down list for weight.
6. Enter the client’s weight.
7. Select English or Metric from the “E/M” drop down list for length/height.
8. Enter the client’s length/height.
9. Click the “Birth Data” box if the data is birth data.
10. Enter the date in the “Collection Date” field for “Biochemical Info.”
11. Enter the hemoglobin or hematocrit value.
12. Enter the blood lead level if available.

13. Enter the date in the “Collection Date” field for “Head Circumference” if available.
14. Select English or Metric from the “E/M” drop down list for “Head Circumference.”
15. Save.
16. Click the “Gestational Age Adjust” button if the infant is preterm.
17. Enter the information into the “Gestational Age Adjust” pop-up.
18. Save.
19. View and print graphs.
20. Exit back to the “Client Processes” window.

**✓ Skill Check:**

Use the information from your  Activity Sheet.

Continue with the client’s new enrollment by entering the anthropometric and biochemical information.

*Print the appropriate graphs when they are complete and turn them in to your instructor.*

** Notes:**

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**Chapter 3: Client Processes**  
**Section 3: Assessment**  
**Lesson: Health History**

***Objectives:***

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

- correctly select and complete appropriate questionnaires;
- interview clients using the health history questions; and
- demonstrate how the CPA reviewed field is correctly used.

***Oregon Policies:***

- ◆ 450 Confidentiality
- ◆ 625 Nutritional Risk Assessment
- ◆ 640 Documentation Requirements

***Overview:***

In TWIST, the “Health History – Questionnaire” screen is one of the first steps used to determine nutrition and health status of a WIC participant. Information collected on this screen can be updated when needed and all historical information is available for you to review at the click of a button.

In this lesson you will learn how to select, complete, update and view health history information.

***Instruction:***

***Completing the Questionnaire***

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Health History

Client Processes - [CP3115 - Woman Certification State ID:3078228 Name: Test, Pregnant DOB:04/01/1988]

File Edit Window Help

Section:

WIC ID: 00946116-01 Name: Test, Pregnant DOB: 04/01/1988 WIC Cat.: WOMAN, PREGNANT Tr.Type: N

Medical Data **Health History** Diet Assessment NE Plan Progress Notes BF Tracking Food Pkg. Assignment

CPA Verification

Questionnaire: Prenatal Health History

Visit Date: 02/28/2008 Entered By: Vernita Reyna CPA Reviewed:  Show: All

Questionnaire

No.	Question	Answer	Notes
01	Tell me about your health or pregnancy.		
02	Is this your first pregnancy?		
03	When did you start going to a doc. or clinic for prenatal care for this pregnancy?		
04	Do you have any medical problems, including any from this or a previous pregnancy?		
05	Do you take any medications?		
06	Do you smoke cigarettes now?		
07	Does anyone living in your household smoke inside the home?		
08	Have you drank beer, wine, or hard liquor during this pregnancy?		
09	Have you used any drugs (street or illicit) in this pregnancy?		
10	In the past 6 months, has someone pushed, hit, slapped, kicked, choked, or physically hurt you in any		

Questionnaire Risk Factors

Immunizations Due Change Transaction Type Determine Eligibility

Ready February 28, 2008 11:39 AM Vernita Reyna Baker CHD famnet\_test2 / famnet

Figure 1: "Health History – Questionnaire" Screen

1. **Retrieve the client for whom you want to enter health history information.**
2. **From the "Questionnaire" field, select the appropriate questionnaire from the drop down list.**
3. **Tab to the "Visit Date" field.**
  - This field defaults to today's date but may be modified.
  - The **"Entered By"** field defaults to the current user based on their User ID.
4. **Tab to the "show" field.**
  - From this drop down menu you may select to display **"All"** questions or only **"mandatory"** questions.
  - The questions will be displayed in the **"Questionnaire"** section of the screen.

5. **Enter the appropriate answer for each question.**

- Click in the question field and scroll over to view the entire question.
- Clicking “**Ok**” will save the answers and close the pop-up.
- Clicking “**Cancel**” will close the pop-up.
- Risks may be generated based on answers entered.
- Certain answers may generate additional questions or pop-ups.

There are three types of answer possibilities:

- multiple choice; the answer is selected from the drop down list of answers.
- masked; the answer is entered in a specific format, such as a date.
- free-form text; the answer is typed in the answer box..

6. **Double click in the “Health History Notes” field.**

- This opens the “**Question Notes**” pop-up and allows you to enter a free form note, as needed.
- A note may be entered for each answer.

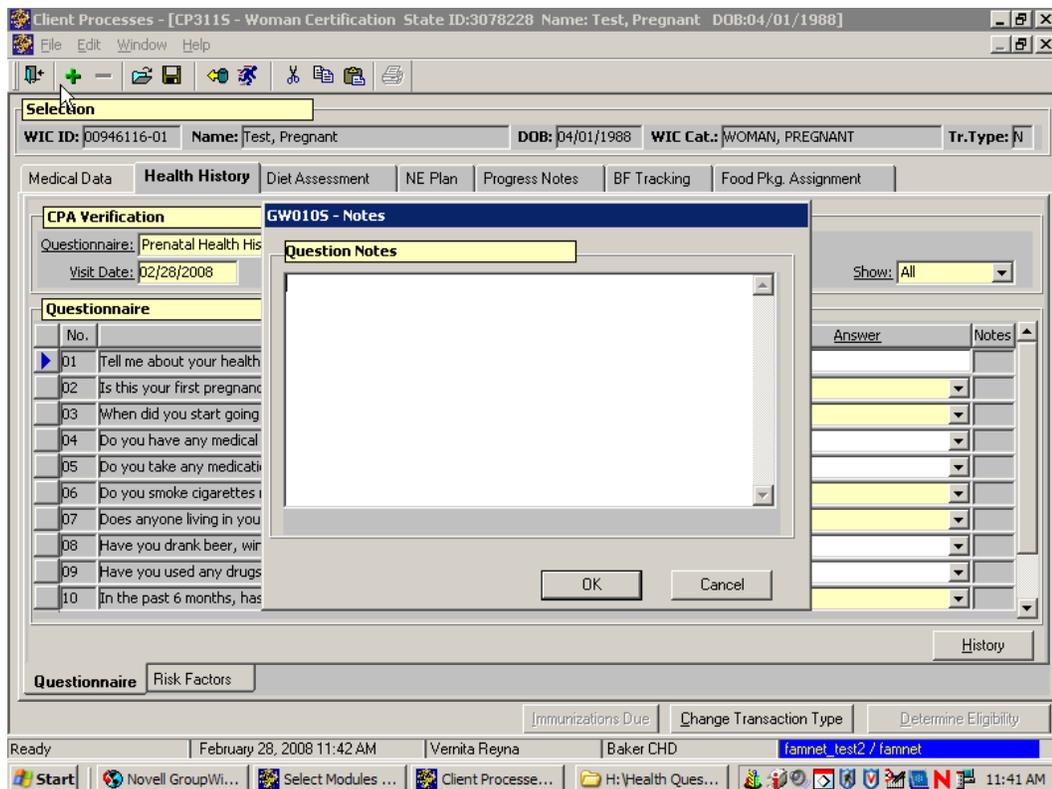


Figure 2: “Health History – Question Notes” Pop-Up

7. **Click “OK” to save the note and close the pop-up.**

Clicking “**Cancel**” will close the pop-up without saving the note.

8. **View the “CPA Reviewed” checkbox.**

- A Competent Professional Authority (CPA) must complete this checkbox.
- If a non-CPA is entering answers to health history questions, a CPA must review the answers before checking the box.
- The “**Health History**” screen will not be marked off as completed (blue check mark on tab) until this box has been checked and all mandatory questions are answered.
- The tab can be saved without a CPA checkmark, but the tab will not receive the completed checkmark.

9. **Save.**

The “**Health History**” tab will now have a checkmark.

### ➔ **Practice Activity #1:**

Use the information the client from your ☛ Activity Sheet.

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Health History

1. Click the “Open” icon to access “Client Search” and select the client from your ☛ Activity Sheet.
2. Click the “Return with Client” button.
3. Select the prenatal health history questionnaire.
4. Leave “Visit Date” as today’s date.
5. Check the “CPA Reviewed” box.
6. Tab to the “Show” field and select All.
7. For the question “Do you have any medical problems?” select yes.
8. Assign Gestational Diabetes and close the pop-up.
9. Complete the rest of the questions.
10. Save your work.

### **Accessing Questionnaire History**

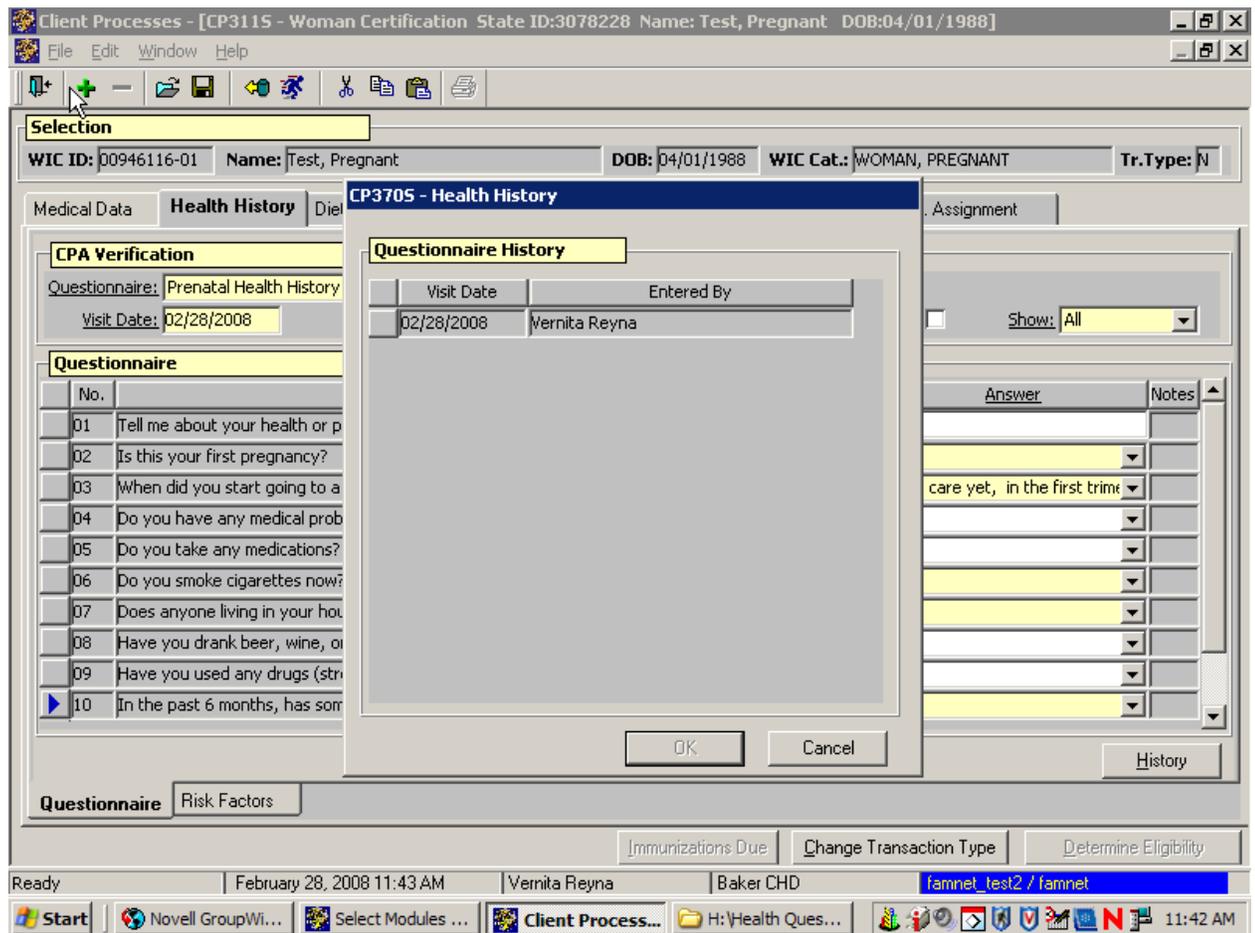
Previous health history questionnaires can be viewed at any time by using the “**History**” button.

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Health History ⇒ Questionnaire

1. **Retrieve the client for whom you want to view health history information.**
2. **On the “Questionnaire” screen, click the “History” button.**

The “Questionnaire History” pop-up is displayed.



**Figure 3: “Health History – Questionnaire – History” Pop-Up**

3. **Select the questionnaire you want to view and click “OK.”**
  - The questionnaire is displayed.
  - The questionnaire is view only and cannot be modified unless it was created today.
  - To close the pop-up without selecting a questionnaire, click “Cancel.”

- To view another questionnaire, click the “**History**” button and repeat the process.

4. **Exit the screen.**

↳ **Practice Activity #2:**

Use the information the client from your ◀ Activity Sheet.

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Health History

1. Click the “Open” icon to access “Client Search” and select the client from your ◀ Activity Sheet.
2. Click the “Return with Client” button.
3. Click the “History” button.
4. Select the oldest “Visit Date” and click OK.
5. View the questionnaire.

✂ **Tips and Shortcuts:**

- After the questionnaire has been completed and saved you can view the risks by clicking on the “Risk Factors” tab.
- In order to get the medical conditions pop-up after the questionnaire has been completed, just change the answer back to “no,” then change it again to “yes.” This will bring the pop-up back again and allow you to change or make additional selections.
- You will be able to change answers to a questionnaire until the end of the day that the questionnaire was originally completed.
- To add a questionnaire (i.e.; for a follow-up visit), click on the “+” icon and select a questionnaire from the drop down menu.

✓ **Skill Check:**

1. Find a partner for this Skill Check. You will be taking turns interviewing each other and entering answers on the “Health History - Questionnaire” screen.
2. Since you have already completed a Health History Questionnaire for yourself you will need to create a new pregnant client.
3. Using this new client, complete the “Health History - Questionnaire” screen for this pregnant woman as you interview your partner. Do a screen print of the completed questionnaire. Then switch, and allow your partner to interview you.

4. The client has come in for a Nutrition Education appointment. You'd like to view the original Health History Questionnaire from this certification. Find the questionnaire on TWIST and do a screen print.
5. Write your name on the screen prints and turn them into your instructor.

 **Notes:**

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**Chapter 3: Client Processes**  
**Section 3: Assessment**  
**Lesson: Diet Assessment**

***Objectives:***

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

- correctly utilize the “diet assessment” function;
- complete the Questionnaire sub-tab;

***Oregon Policies:***

- ◆ 625 Nutrition Risk Assessment

***Overview:***

Helping clients improve their eating habits is an important part of WIC services. TWIST assists this process by providing the Diet Assessment Questionnaire to help you assess and identify dietary risks and goals for the client.

This lesson teaches you how to complete the diet assessment questionnaire that will help you provide appropriate nutrition education to participants.

***Instruction:***

***Completing the Questionnaire***

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Diet Assessment

1. **Retrieve the client for whom you want to enter diet assessment information.**

Client Processes - [CP3115 - Woman Certification State ID:3078228 Name: Test, Pregnant DOB:04/01/1988]

File Edit Window Help

Selection

WIC ID: 00946116-01 Name: Test, Pregnant DOB: 04/01/1988 WIC Cat.: WOMAN, PREGNANT Tr.Type: N

Medical Data Health History **Diet Assessment** NE Plan Progress Notes BF Tracking Food Pkg. Assignment

CPA Verification

Questionnaire: Prenatal Diet Assessment

Visit Date: 02/28/2008 Entered By: Vernita Reyna Show: All

No.	Question	Answer	Notes
01.1	Tell me about how you are eating.		
01.2	What do you like about the way you eat?		
01.3	What concerns do you have about the way you eat?		
02	Do you have any discomforts with eating during this pregnancy?		
02f	Other		
03.1	What concerns, if any, do you have about weight gain with pregnancy?		
04.1	What foods, if any do you avoid for health or other reasons?		
05.1	Are you on a low calorie or special diet?		
06.1	Do you eat anything that is not food?		
07.1	Are you taking a vitamin with iron or iron supplement?		

Questionnaire Risk Factors

Immunizations Due Change Transaction Type Determine Eligibility

Ready February 28, 2008 11:44 AM Vernita Reyna Baker CHD famnet\_test2 / famnet

Figure 1: "Diet Assessment" Screen

2. From the "Questionnaire" field, select the appropriate questionnaire from the drop-down list.
3. "Visit Date" field.
  - This field defaults to today's date but may be modified.
  - The "Entered By" field defaults to the user's login ID.
4. "Show" field.
  - From this drop-down menu, you may select "All" questions or "Mandatory" questions from the drop-down list.
  - The questions will be displayed in the "Questionnaire" section of the screen.
5. Enter the appropriate answer for each question that applies to the participant.
  - Click in the question field and scroll over to view the entire question.
  - Risks may be generated based on answers entered.

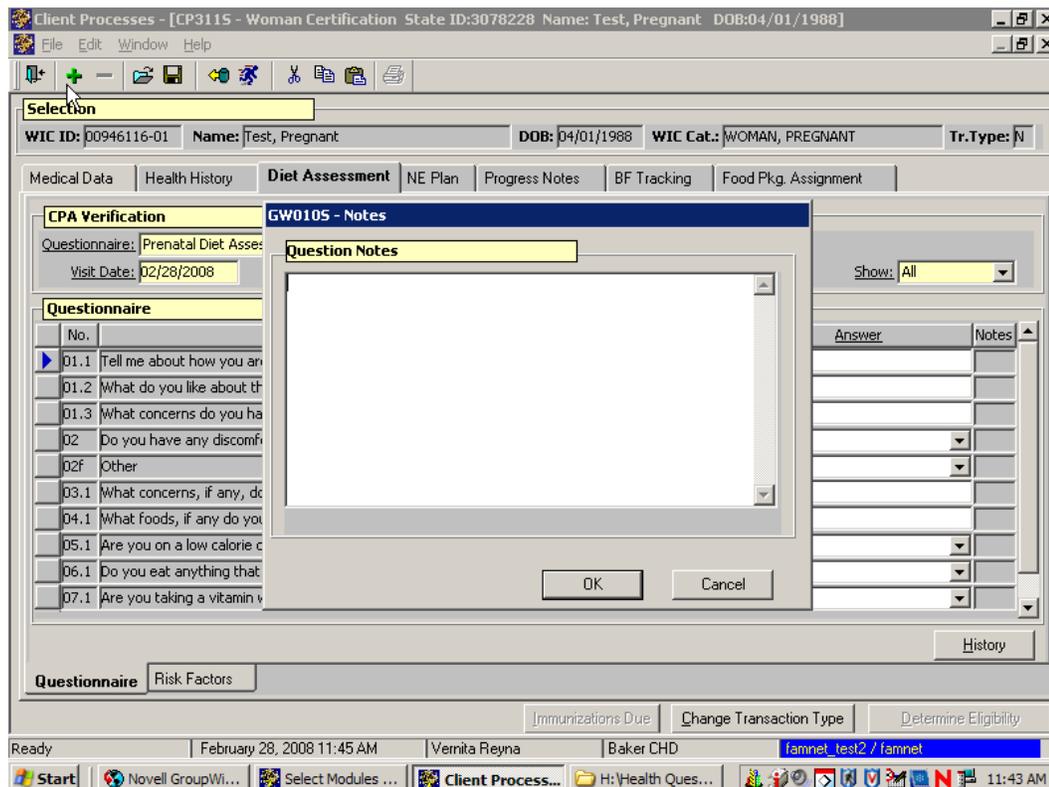
- Certain answers may generate additional questions or pop-ups.

There are three types of answer possibilities:

- multiple choice; the answer is selected from the drop down list of answers.
- masked; the answer is entered in a specific format, such as a date.
- free-form text; the answer is typed in the answer box.

A blue checkmark on the Diet Assessment tab will be generated when the mandatory question is answered and the questionnaire is saved.

6. **Double-click in the “Diet Assessment Notes” field.**



**Figure 2: “Diet Assessment Notes” Pop-Up**

- This opens the “Notes” pop-up and allows you to enter free form notes as needed.
- A note may be entered for each answer.

7. **Click “OK” to save the note and close the pop-up.**

To close the pop-up without saving, click “Cancel.”

8. **Save.**

↳ **Practice Activity #1:**

Use the client from your ☛ Activity Sheet for this practice.

The starting point for this activity is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Diet Assessment ⇒  
Questionnaire

1. Click the “Open” icon to access “Client Search” and select the client for whom you want to enter diet assessment information.
2. Click the “Return with Client” button.
3. Select the pregnant woman questionnaire.
4. Leave “Visit Date” as today’s date.
5. Tab to the “Show” Field and select All.
6. Enter the answers on the attached questionnaire.
7. Save your work.

**Accessing Questionnaire History**

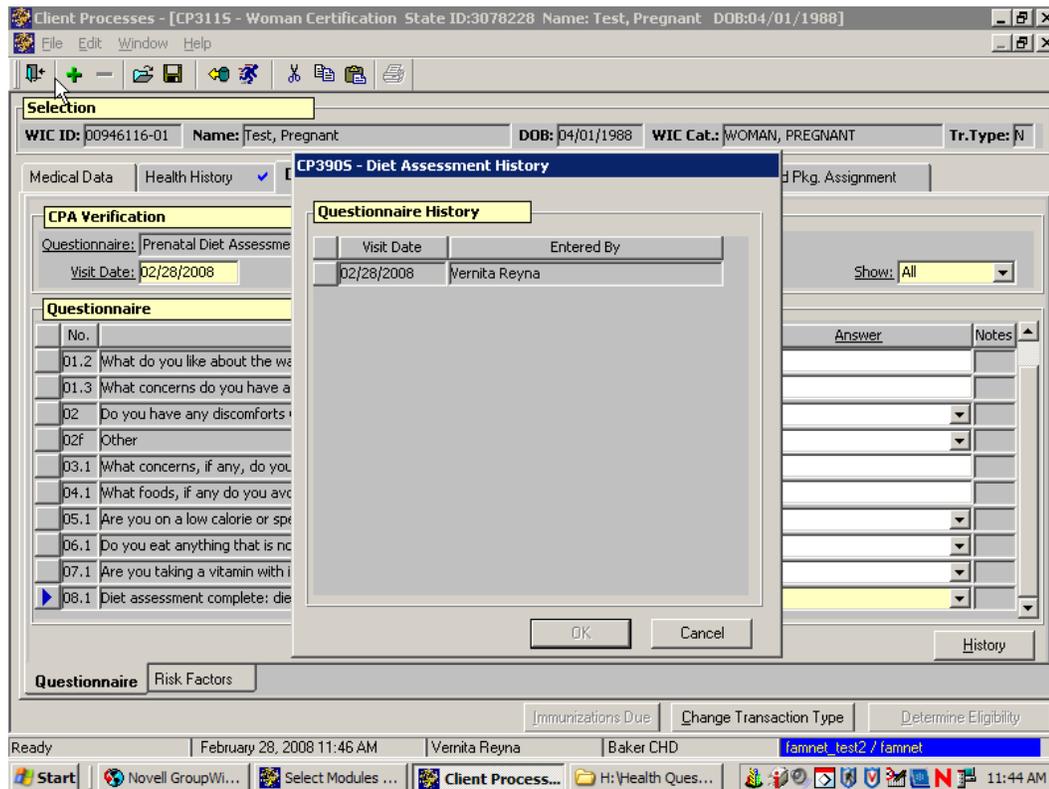
Previous diet assessment questionnaires can be viewed at any time by using the “History” button.

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Diet Assessment ⇒  
Questionnaire

1. **Retrieve the client for whom you want to view diet assessment information.**
2. **On the “Questionnaire” screen, click the “History” button.**

The “**Questionnaire History**” pop-up is displayed.



**Figure 3: “Diet Assessment - History” Pop-Up**

3. **Select the questionnaire you want to view and click “OK.”**
  - The questionnaire is displayed.
  - The questionnaire is view only and cannot be modified on this screen unless it was created today.
  - To close the pop-up without selecting a questionnaire, click **“Cancel.”**
  - To view another questionnaire, click the **“History”** button and repeat the process.
4. **Exit.**

### ↪ **Practice Activity #2:**

Use the client from your ☛ Activity Sheet for this practice.

The starting point for this activity is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Diet Assessment ⇒ Questionnaire

1. Click the “Open” icon to access “Client Search” and select the client for whom you want to view diet assessment history.
2. Click the “Return with Client” button
3. Click the “History” button.
4. Select the oldest “Visit Date” and click “OK.”
5. Return to the “Questionnaire” screen.

### **Tips and Shortcuts:**

- After the questionnaire has been completed and saved, you may view the diet risks by clicking on the “Risk Factors” tab. The process for changing these risks is the same as in the Risk Criteria and Level lesson.
- Ask only the optional questions appropriate for the individual participant.
- Questions can be asked in any order.

### **Skill Check:**

Now that you have learned how to use the “Diet Assessment” screens, let’s take a few minutes to practice these functions again. Pair up with another person and take turns being the client.

1. Complete the “Diet Assessment Questionnaire” for your client.
2. *Print the screen after they are complete.*

### **Notes:**