

**Chapter 3: Client Processes**  
**Section 4: First Nutrition Education Contact**  
**Lesson: Next Steps**

***Objectives:***

Upon the completion of this lesson all users will be able to:

- operate and print the “Nutrition Education - Next Steps” screen; and
- define the meaning of the status of the participant’s nutrition education “Next Step”.

***Oregon Policies:***

- ◆ 820 Nutrition Education: Participant Contacts
- ◆ 830 Nutrition Education: Documentation

***Overview:***

At the beginning of each certification period we help our clients decide what steps they are willing to take towards improving their health or diet. We call these decisions “Next Steps” to show the steps they are willing to take. Throughout the certification period we assess their progress and, if necessary, redefine the “Next Steps” to ensure they are working for the client. Recording our clients’ progress is simplified in TWIST. The “Next Steps” screen provides one location in which the chosen step and the progress on the step is documented. Also available on the screen is the client’s nutrition education visit history. This information will be useful as staff track the client’s progress towards the change they are working on.

***Instruction:***

***Documenting Next Steps***

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Nutrition Education Plan

1. **Click on the “Next Steps” tab at the bottom of the screen.**

**Figure 1: “NE Plan – Next Steps” Screen**

2. **Retrieve the client for whom you want to document “Next Steps.”**
3. **Click in the “Visit Date” field.**

This field defaults to the current date but may be modified.

4. **In the “Next Steps” field, enter the step your client has identified.**
  - This is freeform text.
  - If the client has more than one step, click “Insert” icon to add a new row.
5. **Select the appropriate “status” for the step they have identified.**

☺ See Job Aid “Next Steps Statuses” for more information.

6. **Tab to the “Date Ended” field.**

When a “Status” is selected which end dates the row, this field defaults to today’s date but may be changed.

♪ NOTE: The “**NE Visit History**” displayed in the lower section of the screen is populated from the “Last Visit Summary” screen. This section is display only.

7. **Save.**
8. **Exit.**

### **✂ Tips and Shortcuts:**

- To add additional rows of information click the “Insert” icon.
- Once a row has been saved it may not be removed.

### **↪ Practice Activities:**

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

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ NE Plan ⇒ Next Steps

1. Click on the “Open” icon to access “Client Search” and search for the client from your ☛ Activity Sheet.
2. Click the “Return with Client” button.
3. Leave the date as today’s date.
4. Tab to “Next Step” and enter Increase to 5 servings of fruits and vegetables daily.
5. Change the “Status” to “In Progress”.
6. Save your work.
7. Exit back to the “Client Processes” window.

### **✓ Skill Check:**

Retrieve a certified prenatal client.

For this exercise you will be helping your client review Next Steps set at the last appointment. Change the status of her current steps and add a new one.

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