

Chapter 3: Client Processes

Section 8: Other Client Processes

Lesson: Transaction Types

Objectives:

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

- select the appropriate transaction type for each client process.

Oregon Policies:

- ◆ 945 Computer Generated Transactions

Overview:

In order to make TWIST easier to use, you will use the same screens for many different functions. For example, the “**WIC Intake**” screen can be used during “Prescreening,” “New Enrollment,” “Recertification,” “Transfers” and more! When you enroll a new client or make changes to an existing client’s record, TWIST will automatically enter a “transaction type” based on the TWIST function you are using. But, in most cases such as recertification, you will need to manually change the transaction type.

In this lesson, you will learn about transaction types and how to change them.

Instruction:

About Transaction Types

Within “Client Processes,” transaction types are used to indicate which type of transaction, or process, you are using TWIST for. The transaction types are:

- P – Pre-screen
- N – New Enrollment
- R – Recertification
- D – Display
- C – Change
- A – Re-activate
- I – Transfer-In Within Oregon
- O – Transfer-In Outside Oregon
- T – Terminate
- X – Re-instate

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

Changing Transaction Type

In most cases, you will need to manually change the transaction type to reflect the client process you wish to use. The following are some examples of when you would need to manually change the transaction type.

- To re-activate a terminated client (who is still within their certification period), change transaction type from “D” to “A.”
- To recertify a client who is past their certification end date, change transaction type from “C” to “R.”
- To re-instate a client who is terminated and more than 30 days past their certification end date, change transaction type from “D” to “X.”

The starting point for this section is:

Client Processes ⇒ Enrollment and Intake ⇒ Enrollment ⇒ WIC Intake

1. **Retrieve the client for whom you wish to change transaction type.**
2. **Click the “Change Transaction Type” button (at the bottom of the window) to open the “Select Transaction Type” pop-up.**

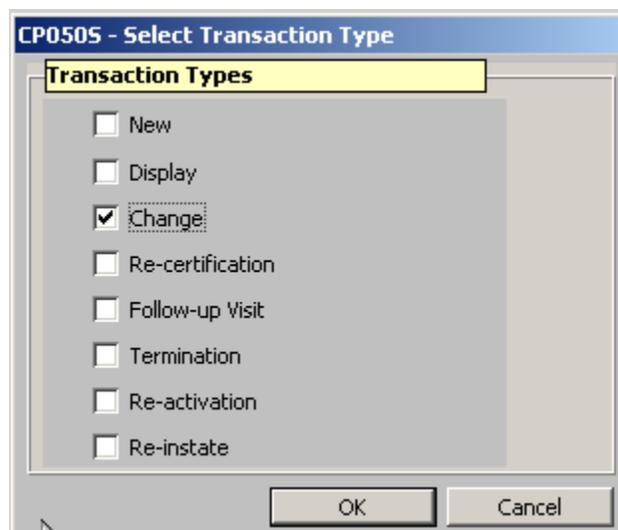


Figure 1: “Select Transaction Type” Pop-Up

3. **Click the check box next to appropriate the transaction type.**

4. Click “OK” to save the transaction type selection and close the pop-up.

↪ **Practice Activity #1:**

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

The starting point for this activity is:

Client Processes ⇒ Enrollment and Intake ⇒ Enrollment ⇒ WIC Intake

1. Open a client record and view the “Transaction Type” field.
2. Click the “Change Transaction Type” button.
3. Change the transaction type.
4. Click “OK” to save the new transaction type.

✓ **Skill Check:**

In the following table, fill in the name of the transaction type that matches the transaction type code given. When finished, check your answers by reviewing the “Transaction Types” Job Aid.

| Transaction Type Code: | Fill in the Transaction Type name: |
|-------------------------------|---|
| A | |
| C | |
| D | |
| I | |
| N | |
| O | |
| P | |
| R | |
| T | |
| X | |

📝 **Notes:**

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