

Chapter 3: Client Processes

Section 8: Other Client Processes

Lesson: Re-activate and Re-instate

Objectives:

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

- demonstrate how to re-activate a client; and
- demonstrate how to re-instate a client.

Overview:

A client may be terminated automatically by TWIST or manually by the user during a certification period for a variety of reasons. Occasionally these terminated clients may return to WIC during their certification period and need to be re-activated. TWIST allows you to re-activate any terminated client whose certification end date is later than the current date. This function allows you to resume benefits immediately for the client without recertifying. This will save both you and the client time.

Any client that is terminated and more than 30 days past the most recent certification end date will need to be reinstated before they can be recertified. The reinstate transaction should also be used for a woman who may or may not be in a current certification period and comes in to be certified for a new pregnancy.

In this lesson you will learn how to reactivate and reinstate clients through the “**Change Transaction Type**” pop-up.

 **See Job Aid “Choosing the Appropriate Transaction Type” for more information.**

Instruction:

Re-activating a Client

The starting point for this section is:

Client Processes ⇒ Enrollment & Intake ⇒ Enrollment

1. **Retrieve the client for whom you want to re-activate.**
2. **Click the “WIC Intake” tab.**
3. **Verify the client is eligible to be re-activated by reviewing the “Termination/Ineligible Reasons” pop-up.**

4. **Verify the client's transaction type is marked "D" for display.**
5. **Verify the certification end date is a future date.**
6. **Select the appropriate "Certification Record."**
7. **Click the "Change Transaction Type" button in the lower right hand corner.**

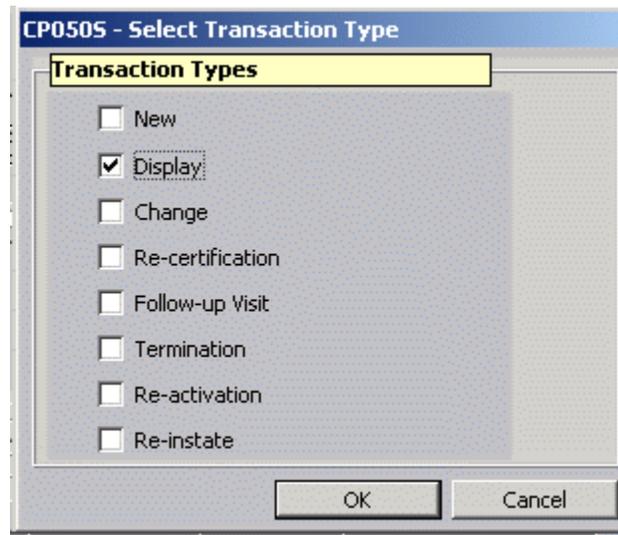


Figure 1: "Select Transaction Type" Pop-Up

8. **Check the "Re-activation" check box.**
9. **Click "OK" to save the change and close the pop-up.**
 - 9.1 The **"Transaction Type"** is changed to **"A"** for re-activated.
 - 9.2 The **"Re-Activate?"** box is checked.
 - 9.3 The **"Term Date"** and the **"Date of Term Notification"** have been reset to **"00/00/0000."**
10. **Save.**
11. **Exit back to "Select Modules."**

Re-instating a Client

The starting point for this section is:

Client Processes ⇒ Enrollment & Intake ⇒ Enrollment

1. **Retrieve the client for whom you want to re-instate.**
2. **Click the “WIC Intake” tab.**
3. **Verify the reinstate transaction type is appropriate for the client’s situation.**
4. **Select the appropriate “Certification Record.”**
5. **Click the “Change Transaction Type” button in the lower right hand corner.**
6. **Check the “Re-instate” check box.**
7. **Click “OK” to save the change and close the pop-up.**
 - 7.1 The **“Transaction Type”** is changed to **“X”** for re-instate.
 - 7.2 The **“WIC Category”** field becomes blank.
8. **Select the client’s category from the drop down list.**

The certification start date will auto fill with the current date.
9. **Enter the “LMP,” “EDD” or “ADD” date as appropriate.**

The certification end date will auto fill based on the client’s category and **“LMP,” “EDD” or “ADD”** as appropriate.
10. **Proceed with the steps for recertifying the client as in the “Recertification” lesson.**

The system will change the **“Transaction Type”** to **“R”** for re-certification when you access the **“Medical Data”** screen.

Tips and Shortcuts:

- From this window you may fast path to:
 - “Client Master Demographics”
 - “Enrollment”
 - “Family Appointments”
 - “Infant/Child Certification”
 - “Woman Certification”
- A client can only be re-activated or reinstated from the “Change Transaction Type” pop-up in the “Enrollment & Intake” section.

- For clients who are terminated and more than 30 days past their certification end date, use the “Re-instate” transaction type.
- When the user selects “Re-instate” or “Re-certification” for an inactive client still within a current certification period, a message will pop-up stating, “The client is still in a valid certification period, consider using the Re-activate Transaction Type.”
- When the user extends the LMP or EDD for a pregnant woman more than 30 days before changing the transaction type, a message will pop-up stating, “You are moving the LMP/EDD more than 30 days. If this is for current pregnancy in TWIST, select YES. If this is a NEW PREGNANCY, select NO, than use the Reinstate transaction and enter the new EDD. Do you still want to proceed?”

↪ **Practice Activity #1:**

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

The starting point for this activity is:

Client Processes ⇒ Enrollment & Intake ⇒ Enrollment

1. Retrieve the client you wish to re-activate.
2. Verify the client is eligible to be re-activated.
3. Click on “WIC Intake.”
4. Verify transaction type is “D.”
5. Verify certification end date is a future date.
6. Click the “Change Transaction Type” button.
7. Check the “Re-activation” box.
8. Click “OK” to close the pop-up.
9. Verify the transaction type is now “A,” the “Re-Activate?” box is checked and the “Term Date” and “Date of Term Notification” are set to 00/00/0000.
10. Exit the screen.

✓ **Skill Check:**

Now that you have completed this lesson take the appropriate steps to re-instate a client. Use the information from your 📄 Activity Sheet for this skill check.

Do a screen print of the “WIC Intake” screen before you re-instate and after you re-instate. Write your name on both screen prints before you turn them in to your instructor.

📝 **Notes:**