

## Chapter 3: Client Processes

### Section 8: Other Client Processes

#### Lesson 803: Updating Client Information Mid-Certification

##### **Objectives:**

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

- summarize how risks are affected by a Change transaction; and
- update information during mid-certification.

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

- ◆ 646 Mid-Certification Health Assessment

##### **Overview:**

During the certification period, you may need or want to update information in a client's record. This could occur during a Mid Cert Health Assessment or Individual Follow-up appointment. TWIST allows you to update all client information any time during the certification period. Updating information may result in additional risk(s) being assigned. You may also manually add additional risk(s) during the certification period. However, any change in the client's data **will not** result in risks being removed. In addition, changes made to the client's income will not automatically terminate them in the system. Client's whose income exceeds income requirements mid-certification will need to be manually terminated. Refer to Chapter 3, Lesson 805, *Terminations/Ineligible* for how to manually terminate a client from WIC.

Once a client certification has been completed the transaction type automatically changes to "C." Information may be changed at any time. You do not need to access the "Change Transaction Type" pop-up.

To change a client's food package mid-certification, see Chapter 3, Lesson 502, *Changing Food Package Mid-Certification*.

To change a client's category mid-certification, see Chapter 3, Lesson 806, *Category Change*.

In this lesson you will learn how to update client certification information.

**Instruction:****Changing Client Information**

The starting point for this section is:  
Client Processes ⇒ Certification

On the “Certification” drop down menu there are two options: Infant/Child or Woman. Both options display identical drop down menus. Select the appropriate choice to access the certification screens for the correct category.

1. **Retrieve the client for whom you want to update information.**
2. **Click the tab title of the screen you want to update.**

Client Processes - [CP3115 - Woman Certification State ID:2873717 Name: Certification, Mid DOB:12/13/1978]

File Edit Window Help

Selection

WIC ID: 00851837-01 Name: Certification, Mid DOB: 12/13/1978 WIC Cat.: WOMAN, EXCLUSIVELY BREASTFE Tr.Type: C

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

Anthropometry

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				
12/13/2005	POSTPARTUM	ENGLISH	145	0	ENGLISH	63	0	0	0	25.68	

PostPartum

Actual Delivery Date: 11/30/2005  
Estimated Delivery Date: 11/29/2005  
Total Weight Gain (in LBS): 28.00  
Pregnancy Just Completed  
Twins or More:  E/M LBS OZ  
Wt. Before Last Pregnancy: ENGLISH 135 0  
BMI Before Last Pregnancy: 23.91

Biochemical Info

Collection Date	Prenatal/ Postpartum	Hemoglobin	Hematocrit	Weeks Gest.	Blood Lead Level
12/13/2005	POSTPARTUM	12.00	.00	0	0.0

Insert Remove View Graph

Change Transaction Type Determine Eligibility

Ready December 13, 2005 09:34:18 AM Sara Goodrich Baker CHD dns-olp2d-sys11 / famnet

**Figure 1: “Woman Certification” Window**

3. **Use the “Insert” icon or button to add a new row of data.**
4. **Enter the new information.**
5. **Click “Health History – Risk Factors” to review medical or health risks.**

6. To assign an additional risk double click on the risk you want to assign.

♪ NOTE: Your role in the clinic determines which screens you may update.

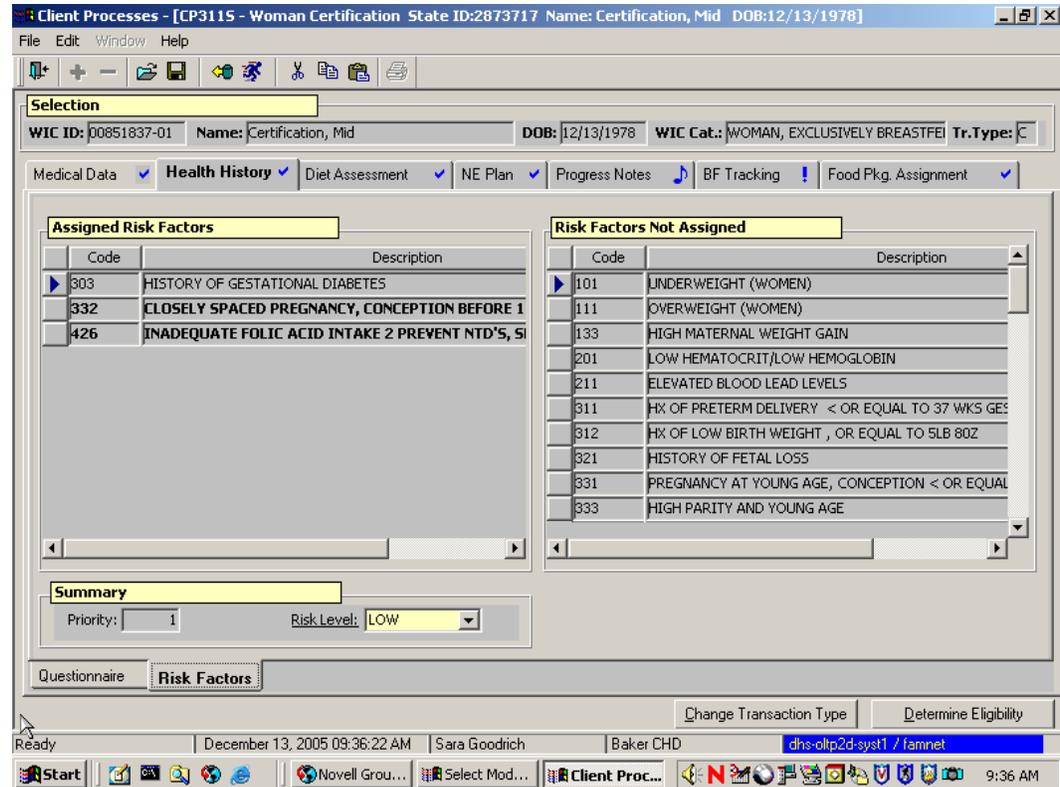


Figure 2: “Health History – Risk Factors” Screen

7. Save.
8. Exit back to “Select Modules.”

✂ *Tips and Shortcuts:*

 **Notes**