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.**

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.**

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