

## **Chapter 3: Client Processes**

### **Section 8: Other Client Processes**

#### **Lesson 804: Transfers**

##### ***Objectives:***

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

- Transfer a participant or family from one local agency to another within Oregon;
- Transfer a participant from another state into Oregon WIC; and
- Print a WIC transfer card (VOC).

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

- ◆ 652 WIC Transfer Card and WIC Overseas Program
- ◆ 653 Participant Transfers Into And Out-Of-State
- ◆ 654 Participant Transfers Within State
- ◆ 610 Required Proofs - Identity, Residency, Income

##### ***Overview:***

TWIST makes transferring a participant as easy as 1-2-3. In TWIST you can transfer participants from one local agency to another in just a few minutes and enrolling a participant from another state is almost as fast. You will even be able to print transfer information for participants leaving Oregon with a few quick clicks!

##### ***Instruction:***

##### ***Transferring a Participant from Outside Oregon***

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

To complete an out-of-state transfer, minimum information must be entered into TWIST. This information should be available on the Verification of Certification (VOC) or Transfer card the participant will bring with them. If not, call the participant's originating WIC clinic to get the information you need.

## 1. Select “Transfer-In From Outside Oregon.”

The screenshot shows a software interface for managing client transfers. The main window is titled "Client Processes - [CP1505 - Transfer-In From Outside Oregon]". It features a menu bar (File, Edit, Window, Help) and a toolbar with various icons. The interface is organized into several sections:

- Selection:** Contains input fields for "WIC ID:", "Name:", "DOB: 00/00/0000", "WIC Cat.:", and "Tr.Type:".
- WIC Intake:** A tabbed section with sub-tabs for "WIC Intake", "WIC Notes", "Transfer Information", and "Food Pkg. Assignment". The "WIC Intake" sub-tab is active and contains numerous dropdown menus and checkboxes for data entry, including "Other Family Members On WIC?", "Clinic:", "WIC Category:", "Are You a Migrant?", "Are You Homeless?", "May We Contact You By Phone?", "May We Contact You By Mail?", "Auto Scheduler, OK?", "WIC ID:", "Old WIC ID:", "Waiting List:", "For Women Only" (with sub-sections for "Voter Registration Offered:", "Marital Status:", "Education:"), "LMP: 00/00/0000 or EDD: 00/00/0000 ADD: 00/00/0000", "Mother's WIC ID:", "Guardian Type:", "Mother's DOB: 00/00/0000", "DQ Proxy:", and "Medical Provider Info Present:".
- Certification Dates:** A table with columns for "Start Date", "End Date", "Transfer", "Term Date", "Term Type", and "Date of Term Notification". A single row is visible with values: "00/00/0000", "00/00/0000", "", "00/00/0000", "Client", and "00/00/0000".
- Bottom Navigation:** A series of buttons including "Generate WIC ID", "Search for Family Members", "WIC ID History", "Referrals", "Medical Providers", "Put On Wait List", "Immunizations Due", "Assign F/W Group", "Assign Peer Counselor", "Client Disqualification", "Change Transaction Type", and "Determine Eligibility".

The status bar at the bottom indicates the system is "Ready", the date is "February 14, 2007 08:59 AM", the user is "Sara Goodrich", and the client is "Baker CHD". The taskbar shows the "Iamnet\_test / Iamnet" application is active.

Figure 1: “Transfer-In From Outside Oregon” Pop-Up

- The window is divided into the “**Selection**” section, which contains the participant’s information, and the tab section.
- The window contains four tabs: “**WIC Intake**,” “**WIC Notes**,” “**Transfer Information**” and “**Food Pkg. Assignment**.”
- The “**WIC Intake**,” “**Transfer Information**” and the “**Food Pkg. Assignment**” screens must be completed to successfully transfer the participant into WIC.
- Tabs will be marked with a check mark when completed.

## 2. Search for the participant you want to transfer into Oregon WIC.

🎵 NOTE: Remember, you must search for a participant before they can be added to the database.

2.1 Click the “**Add New Client**” button if the participant is not in the FamilyNet database.

- This takes you to the “**Client Primary**” screen.
- Refer to Chapter 2, Lesson 100 *Client Search and Demographics* to enter client primary information.

2.2 If the participant is already in the FamilyNet database for your agency, continue on to step 3.

2.3 If the participant is already in the FamilyNet database, but not in your agency, exit and go to the **“Transfer-In From Inside Oregon”** window.

- The participant must first be transferred into your agency using the **“Transfer-In From Inside Oregon”** window.
- Refer to the *Completing a Transfer-In Within Oregon* section of this lesson to transfer the participant into your agency.
- Once the participant is transferred into your agency, complete the out-of-state transfer using the **“Transfer-In From Outside Oregon”** window.

**3. Click on the “Return w/Client” button to return to “Transfer-In From Outside Oregon” window.**

- The participant information is displayed in the **“Selection”** section of the window.
- The **“WIC ID”** and **“WIC Cat.”** fields are blank. These will be populated once you have completed and saved the **“WIC Intake”** screen.
- The **“Tr. Type”** field is populated with **“O”** to indicate this participant is an out of state transfer.

### **Completing the “WIC Intake” Screen**

**4. Complete the “WIC Intake” screen as instructed in the lesson “WIC Intake.”**

♪ NOTE: Participants certified on WIC in another state must be placed at the top of the waiting list if the local agency is at maximum caseload and not accepting new participants. Refer to Policy 653 for transferring in participants from out of state when an agency is at maximum caseload.

5. Click in the “Start Date” field and enter the actual certification start date from the participant’s transfer card.
6. Tab to the “End Date” field and enter the actual certification end date from the participant’s transfer card.
7. Save.

The “WIC ID” and “WIC Cat.” fields are now populated.

### Completing the “WIC Notes” Screen

8. Click the “WIC Notes” tab.
9. Complete the “Notes” screen as needed.

### Completing the “Transfer Information” Screen

10. Click the “Transfer Information” tab.

The screenshot displays the 'Transfer Information' screen within a software application. At the top, there is a 'Selection' header and a row of fields: 'WIC ID: 00757110-02', 'Name: Transfer, Woman', 'DOB: 10/20/1989', 'WIC Cat.: WOMAN, PREGNANT', and 'Tr. Type: 0'. Below this is a tabbed interface with 'WIC Intake', 'WIC Notes', 'Transfer Information' (selected), and 'Food Pkg. Assignment'. The 'Transfer Information' section contains several input fields: 'Certification Date: 07/01/2009', 'Certification End Date: 02/28/2010', 'Priority: 7 TRANSFER FROM AN', 'Risk Level: LOW', 'Date Last FI Issued: 00/00/0000', 'Estimated Delivery Date: 01/01/2010', 'Proof of ID' (dropdown), 'Proof of Residency' (dropdown), 'Eligibility Pending' (checkbox), and 'Eligibility Pending Date: 00/00/0000'. A 'Measurement Information' section includes 'Measurement Date: 00/00/0000', 'Weight: ENGLISH (dropdown), 0 LBS, 0 OZ', and 'Height: ENGLISH (dropdown), 0 Inch, 0 1/8'. Below this are 'HGB: .00' and 'HCT: .00' fields, and a 'Twins or More' checkbox. A 'Nutritional Risks' button is located at the bottom right of the main form area. At the very bottom of the screen, a row of buttons includes 'Immunizations Due', 'Assign F/W Group', 'Assign Peer Counselor', 'Client Disqualification', 'Change Transaction Type', and 'Determine Eligibility'.

**Figure 2: “Transfer Information” Screen**

- Information from the VOC is entered in this screen.
- The “**Certification Date**” and “**Certification End Date**” are carried over from the “WIC Intake” screen.

11. Select the type of proof provided in the “Proof of ID” field.

12. Select the type of proof provided in the “Proof of Residence” field.

12.1 Check the “**Eligibility Pending**” box if the participant does not have the appropriate proofs with them. See Policy 610 *Required Proofs - Identity, Residency, Income* for more information.

13. Click the “Nutritional Risk” button in the lower right hand corner to open the pop-up.

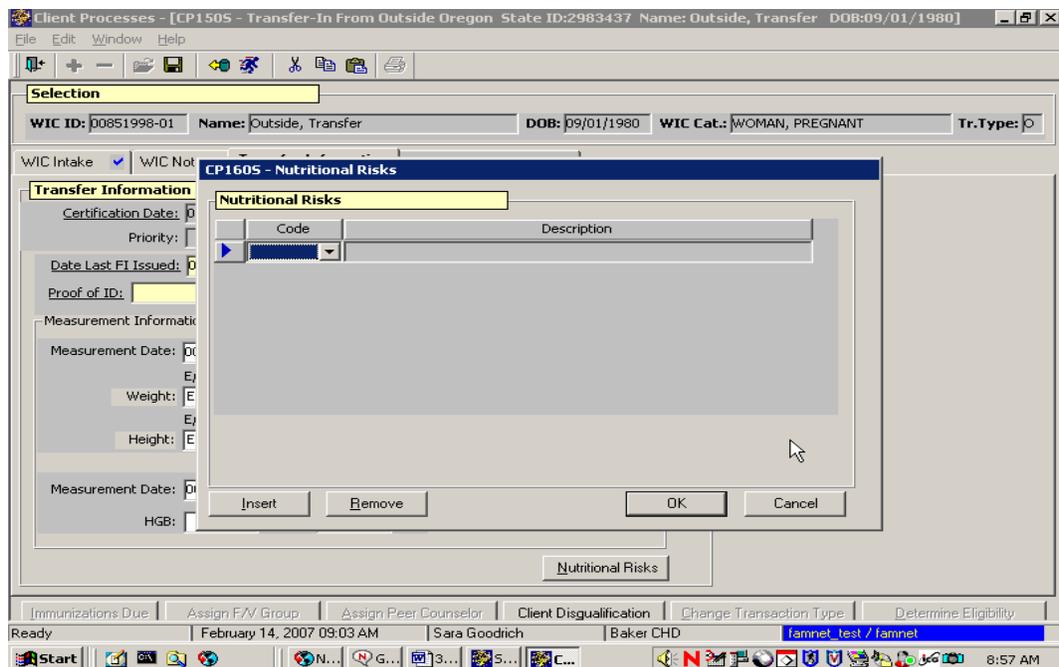


Figure 3: “Nutritional Risk” Pop-Up

- A risk must be assigned to complete the screen.
- The “**Risk Level**” field will be populated by the system once a risk has been assigned, but it may be modified.

14. Select the appropriate risk from the “Code” field drop down list.

- The “**Description**” will be displayed.
- To add multiple risks, click the “**Insert**” button to generate a new row and select the additional risk from the drop down.
- To remove a row, click the “**Remove**” button.

15. Click “OK” to save your work and close the pop-up or “Cancel” to close the pop-up without saving.
16. Enter the date the participant last received benefits in the “Date Last FI Issued” field.
17. Modify “Estimated Delivery Date” if needed.
18. Enter “Measurement Information” if available.
19. Check the “Twins or more” check box if appropriate.
20. Complete the “Food Pkg. Assignment” screen.

See Chapter 3, Lesson 500 *Assigning and Forecasting Food Packages*.

21. Save.
22. Go to the “Family Summary” screen to issue benefits.

See Chapter 3, Lesson 1100, *Family Summary Screen*.

23. Go to the “Family Cardholder” screen to issue an eWIC card to the family.

See Chapter 3, Lesson 1200, *Family Cardholder*.

### ➔ **Practice Activity #1:**

Use the Practice Data base for this practice.

The starting point for this activity is:

Participant Processes ⇒ Transfers

1. Select “Transfer-In From Outside Oregon.”
2. Perform a participant search.
3. Enter the participant information into “Client Demographics.”
4. Close.
5. Click the “Return with Client” button.
6. Complete the “WIC Intake” screen using any information you want.
7. Enter one month ago as the Start Date.
8. Access the “WIC Notes” screen and enter a note stating “Transferred from Washington.”
9. Access the “Transfer Information” screen and enter the risk “502 - Transfer of Certification.”
10. Change the “Risk Level” to “High.”

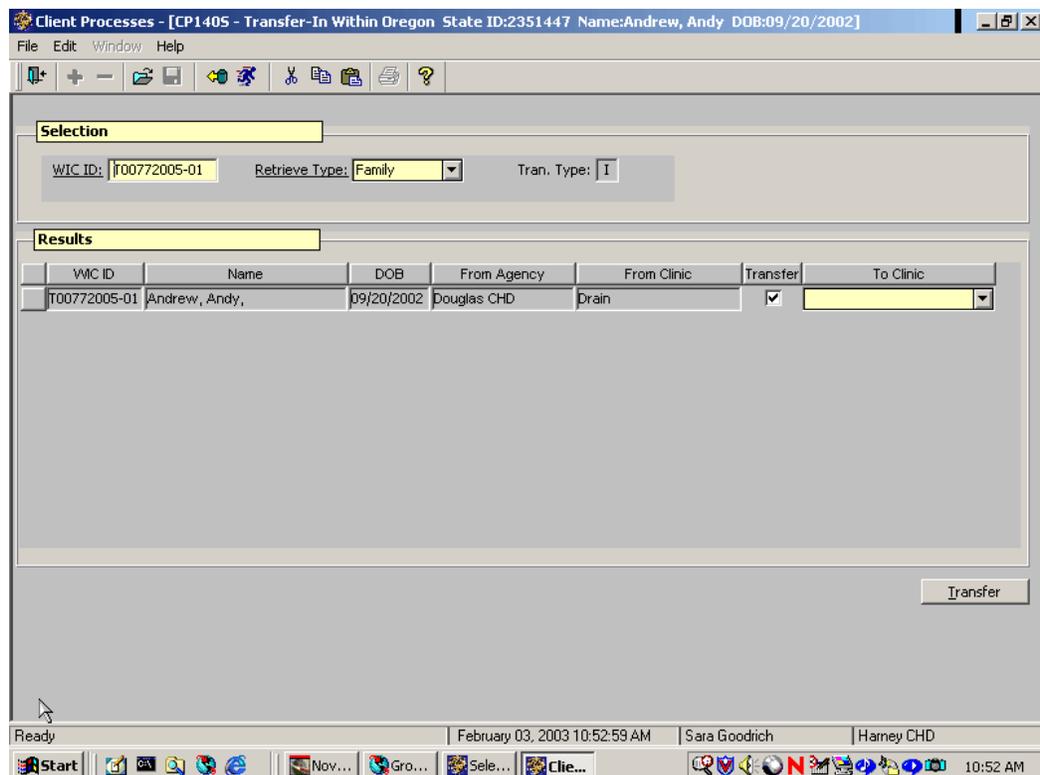
11. In the “Date Last FI Issued” field enter the first of last month.
12. Leave “Medical Date” blank.
13. Save your work.
14. Write the WIC ID number down on a piece of paper. You will need it later in the activity.
15. Exit.

### **Completing a Transfer-In Within Oregon**

Use this process to transfer-in a participant from another agency within Oregon.

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

1. **Select “Transfer-In From Within Oregon.”**
2. **Retrieve the participant for whom you wish to transfer-in.**



**Figure 4: “Transfer-In Within Oregon” Screen**

- The “**WIC ID**” field is populated with the participant’s current ID number.

- The “**Tran. Type**” field is populated with an “**I**” to indicate this 4. participant is a transfer within Oregon.
3. **Click in the “Retrieve Type” field.**
    - If “**Client**” is selected, only the individual participant will be displayed in the “**Results**” section and marked for transfer.
    - If “**Family**” is selected, all members of the family will be displayed in the “**Results**” section and marked for transfer.
  4. **Uncheck the “Transfer” box if you do not want to transfer a specific member in the family.**
  5. **In the “Clinic” field, select the new clinic from the drop down list.**
  6. **Click the “Transfer” button in the lower right hand corner.**
    - Participants at permanent sites are transferred immediately.
    - The screen is cleared of all information.
    - You may fast path to another window but the participant’s information is not carried forward.
  7. **Verify and update client demographic information on the “Client Primary” screen.**

Refer to Chapter 2, Lesson 100 *Client Search and Demographics* to enter client primary information.

8. **Verify benefit issuance and appointment information on the “Family Summary” screen.**

♪ NOTE: Terminated participants may be transferred. Terminated participants still within their certification period may be reactivated. Terminated participants whose certification period has expired will be transferred but must be recertified.

### ↪ **Practice Activity #2:**

Use the Practice Data base for this practice.

The starting point for this activity is:  
Client Processes ⇒ Transfers

1. Select “Transfer-In From Within Oregon.”
2. Click on the “Open” icon to access “Client Search” and from the activity sheet.

3. Click the “Return with Client” button.
4. Select your clinic from the drop down list in the “To Clinic” field.
5. Click the “Transfer” button in the lower right hand corner.
6. Update the “Client Primary” information.
7. Exit.

## Printing a VOC/Transfer Card

Participants may request transfer information when they are moving out of state. This is called a Verification of Certification (VOC) card. TWIST will print a VOC card for any participant on demand. You will need the participant's WIC ID number before you access the window.

The starting point for this section is:

Client Processes ⇒ Outputs

1. **Select “Documents” and “VOC Card” from the drop down menus.**
2. **Enter the participant's WIC ID number.**

You can also search and return with the participant from Client Primary. The system will fill in the participant's WIC ID number.

3. **Click the “Run” icon to display the WIC Transfer Card.**

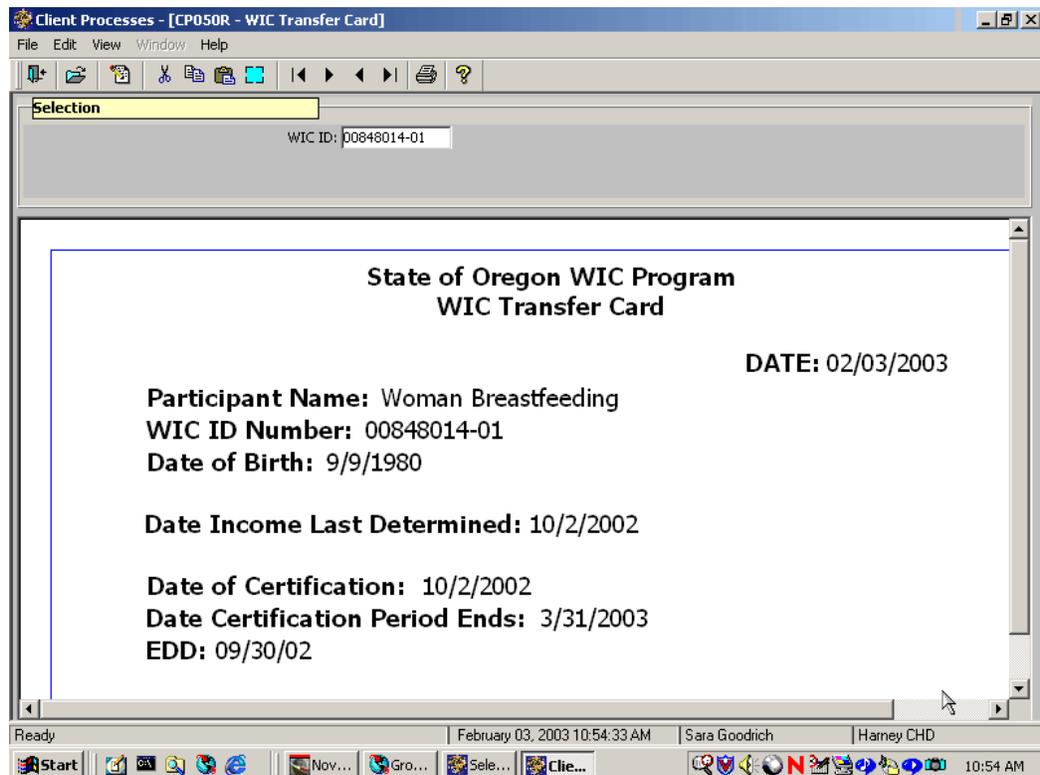


Figure 5: “WIC Transfer Card” Screen

Use the scroll bars to view all the information.

4. **Click the “Print” icon to print the VOC card.**
5. **Exit.**

NOTE: Consider terminating the participant using the “Move Out-of-State” termination reason after you print the transfer card. See Chapter 3, Lesson 805, *Termination and Ineligible* for more information.

### ↪ **Practice Activity #3:**

Use the Practice Data base for this practice.

The starting point for this activity is:

Client Processes ⇒ Output ⇒ Documents ⇒ VOC Card

1. Enter the WIC ID number in the WIC ID field.
2. Click the “Run” icon.
3. Use the scroll bars to view all the information.
4. Exit the window.

### ✂ **Tips and Shortcuts:**

- From the transfer window you may fast path to:
  - “Certification, Infant/Child”
  - “Certification, Woman”
  - “Client Master Demographics”
  - “Family Appointments”
  - “Family Cardholder”
  - “Family Summary Screen”
  - “Family Summary Screen (Old)”
- After a participant(s) has been transferred you may want to go to the “Family Summary Screen” to determine what you need to do next.
- You may edit information in the “Transfer-In From Outside Oregon” screen the day you enter the data. However after the “End of Day Processes” has run, the information in this window may not be changed.
- Terminated participants, both active and non-active, still need to be transferred in order to prevent duplicate records. Non-active termed participants can then be given an appointment. Termed participants still within their certification period can be reactivated when appropriate.
- When there are overlapping dates in the “Start Date” and “End Date” fields, the system will automatically adjust to the next available date.

 **Notes**