

Chapter 3: Client Processes

Section 8: Other Client Processes

Lesson 805: Terminations/Ineligible

Objectives:

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

- Complete a termination transaction for client or a family;
- Identify actions that will cancel and re-open appointments;
- Print an individual ineligibility or graduation notice;
- Batch print ineligibility or graduation notices;
- Change the termination notification date; and
- Differentiate between ineligibility and termination whether it is done automatically by the system or is manually keyed in.

Oregon Policies:

- ◆ 636 Participant Notification: Ineligibility and Termination From WIC

Overview:

A client may be terminated automatically by TWIST or manually by the user for a variety of reasons. TWIST automatically terminates clients who are no longer eligible due to a category change, end of certification, not using benefits for two consecutive months, or death. The user may also manually terminate a client for abuse, voluntary withdrawal, dual participation, or moving out of state. The notifications for terminations are put on the FamilyNet website and are printed by the local agency.

When a client is terminated, TWIST will automatically remove the benefits from their eWIC account. Depending on the reason for termination, the benefits may be removed for both the current and future months or just for the future months.

Clients terminated from the system are changed to a “Display” only mode and the user may update only limited information. Clients must have an active certification in order for the user to terminate. Clients who are found ineligible during the certification process are not terminated, but are marked as ineligible. A client might be found ineligible due to income ineligibility or no medical/nutritional risk. When this occurs, a message will pop-up stating “The certification is complete but the client is still ineligible. Click on the Determine Eligibility Button to view reasons.”

When a client is terminated or marked ineligible, the user is unable to issue benefits for them. Clients automatically terminated will also have their next scheduled appointment automatically canceled. This appointment slot will then

be re-opened in the appointment scheduler. Clients manually terminated will need to have their next scheduled appointment canceled manually. Refer to the Canceling an Appointment lesson for how to cancel an appointment. Appointment requests for terminated clients will become inactive. If the client is reactivated, their appointment request will become active and available to auto schedule. Refer to the Appointment Requests lesson for how to reschedule an appointment.

In this lesson you will learn how to manually terminate clients through the “Change Transaction Type” pop-up and how to print batch termination notices from the FamilyNet website.

Instruction:

Manually Terminating a Client

The starting point for this section is:

Client Processes ⇒ Enrollment & Intake ⇒ Enrollment

The screenshot shows the 'WIC Intake' screen with the following details:

- Client Information:** WIC ID: 07987545-01, Name: Category, BFMom, DOB: 09/01/1976, WIC Cat.: WOMAN, BREASTFEEDING AND SU, Tr.Type: C
- WIC Intake Section:**
 - Check If No Changes:
 - Other Family Members On WIC?:
 - Clinic: Harney Health Dept.
 - WIC Category: WOMAN, BREASTFEEDING AND SU
 - Are You a Migrant?:
 - Are You Homeless?:
 - May We Contact You By Phone?:
 - May We Contact You By Mail?:
 - Auto Scheduler, OK?:
 - Re-Activate?:
 - WIC ID: 07987545-01, Mail Code: STATE PRINT
 - Old WIC ID: , Waiting List:
 - For Women Only:
 - Voter Registration Offered: YES
 - Marital Status: MARRIED
 - Education: ASSOCIATES DEGREE
 - LMP: 04/13/2002 or EDD: 01/18/2003
 - ADD: 01/21/2003
 - Mother's WIC ID: , Mother's DOB: 00/00/0000
 - Compliance Client: Medical Provider Info Present:
- Certification Dates Table:**

Start Date	End Date	Transfer	Term Date	Term Type	Date of Term Notification
01/31/2003	06/30/2003		00/00/0000	Client	00/00/0000
- Buttons:** Generate WIC ID, Search for Family Members, WIC ID History, Referrals, Medical Providers, Put On Wait List, Change Transaction Type, Determine Eligibility

Figure 1: “WIC Intake” Screen

1. **Retrieve the client you wish to terminate from the WIC Program.**

2. **Click the “WIC Intake” tab.**
 - 2.1 Verify the client’s transaction type is marked “C” for change.
 - 2.2 Verify the certification end date is a future date.
 - 2.3 Verify the “Term Date,” “Term Type” and “Date of Term Notification” are disabled.
3. **Click the “Change Transaction Type” button in the lower right hand corner.**



Figure 2: “Change Select Type” Pop-Up

4. **Check the “Termination” check box.**
5. **Click “OK” to save the change and close the pop-up.**

Certification Dates						
Start Date	End Date	Transfer	Term Date	Term Type	Date of Term Notification	
01/31/2003	06/30/2003		02/05/2003	Client	00/00/0000	

Category History

Figure 3: “WIC Intake” Screen with Term Information Enabled

- The “Tr. Type” field is changed to “T” to indicate the client is terminated from the program.
- “Term Date” and “Term Type” are now enabled.
- The “Term Date” defaults to the current date, but can be modified.
- The “Date of Term Notification” will auto fill when a notification is printed or when a date is entered in the manual notification pop-up.

6. **Select “Client” or “Family” from the drop down list in the “Term Type” field.**
 - If “Client” is selected only the client will be terminated.
 - If “Family” is selected all members of the family currently enrolled on WIC will be terminated.
7. **Click the “Termination/Ineligibility Reasons” button.**

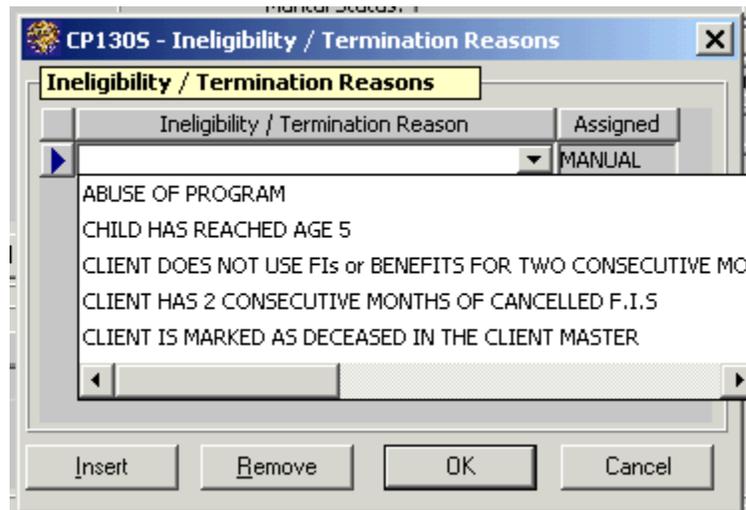


Figure 4: “Ineligibility/Termination Reasons” Pop-Up

8. **Select the reason for termination from the drop down list.**
 - The system will default the “Assigned” field to manual.
 - Use the “Insert” button to add additional reasons.
 - Use the “Remove” button to delete a reason.
 - Reasons assigned by the system may not be removed.
 - Use the “OK” button to save your work and close the pop-up.
 - Use “Cancel” to close the pop-up without saving your work.

🎵 **NOTE:** When a client is manually terminated, TWIST will remove the benefits from their eWIC account. Depending on the reason for termination, the benefits may be removed for both the current and future months or just for the future months.

😊 **See Job Aid “Terminations and Benefit Issuance” for more information.**

9. **Save.**

A message pops up stating, “The client is terminated. Do you want to issue a Graduation Notice?”

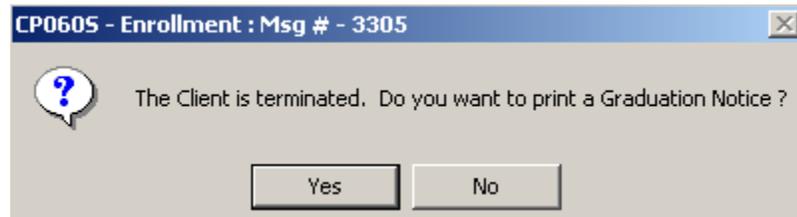


Figure 5: “Graduation Notice” Pop-Up

10. **Click “Yes” to go to the “Graduation Notice” screen and close the pop-up.**

10.1 Clicking “No” will close the pop-up without going to the “Graduation Notice” screen. If a notice is not printed now, one will automatically be produced and put on the FamilyNet website on Sunday of the next week.

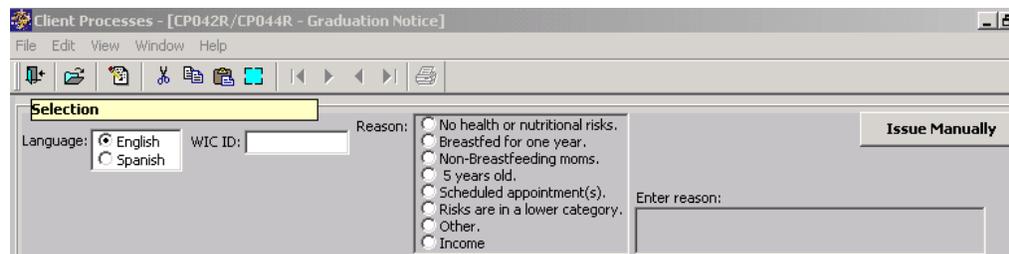


Figure 6: “Graduation Notice” Screen

Printing a Graduation Notice in TWIST

♪ NOTE: See the section “Providing a Manually Issued Graduation Notice” for information on manually entering a “Date of Term Notification.”

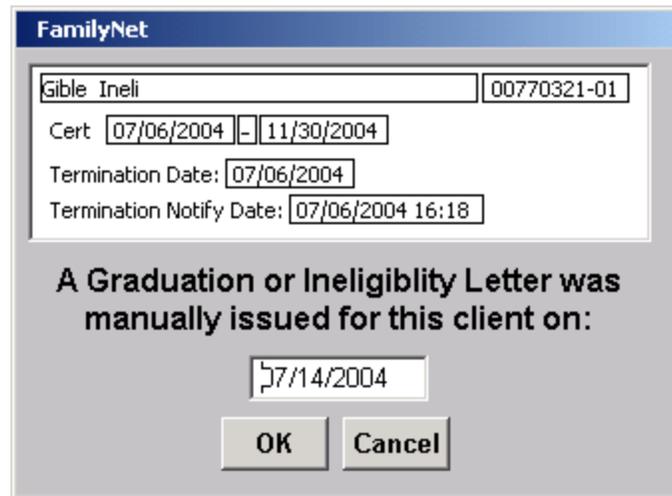
11. **Select the appropriate language by clicking in the corresponding circle.**

♪ NOTE: The “WIC ID” field auto-fills.

12. **Select the “Reason” by clicking the appropriate circle.**

If “Other” is selected, type the reason in the “Enter Reason” field.

13. **Click the “Run” icon.**
 - The notice will display.
 - Use the scroll bars to the right and at the bottom to view the entire notice.
14. **Click the “Print” icon to print the notice.**



Providing a Manually Issued Graduation Notice

1. **Click on the “Issue Manually” button, instead of completing steps 11 to14.**

Figure 7: “Manually Issued” Pop-Up

15. **After verifying the data is correct, click “OK.”**
 - Use this process if a hand-completed notice is being issued to the participant. This documents the date of termination notification in TWIST (e.g. no laser printer is available or is inconvenient to print a notice in TWIST.)
 - The date may be changed if necessary.
 - If the date entered is not valid, you will get an error message and be returned to the pop-up to correct the date.
17. **Exit.**
 - The “Tr. Type” field is changed to “D” to indicate that the client is now display only.

- The “Term Date” and “Term Type” fields are disabled.
- “Date of Term Notification” is auto-filled with today’s date.
- Only the following fields in the client record are modifiable once a client has been terminated.
 - WIC Category
 - Are you Migrant?
 - Are you Homeless?
 - Put On Wait List
 - WIC Notes
 - Family Appointment Record

Printing an Ineligibility Notice

If a client is found to be ineligible during an enrollment, the system will notify you of their ineligibility and ask if you want to print an ineligibility notice. If you select “yes,” the system will print a notice and document the date of notification. You may also enter a date of notification if an ineligibility letter is manually completed.

Printing an Ineligibility Notice on Demand

Starting point for this section is:

Client Processes ⇒ Outputs ⇒ Documents ⇒ Ineligibility Notice

1. **Retrieve the client for whom you wish to print an ineligibility letter.**
2. **Select the appropriate language by clicking in the corresponding circle.**
3. **Select the “Reason” by clicking the appropriate circle.**

If “Other” is selected, type the reason in the “Enter Reason” field.
4. **Click the “Run” icon.**

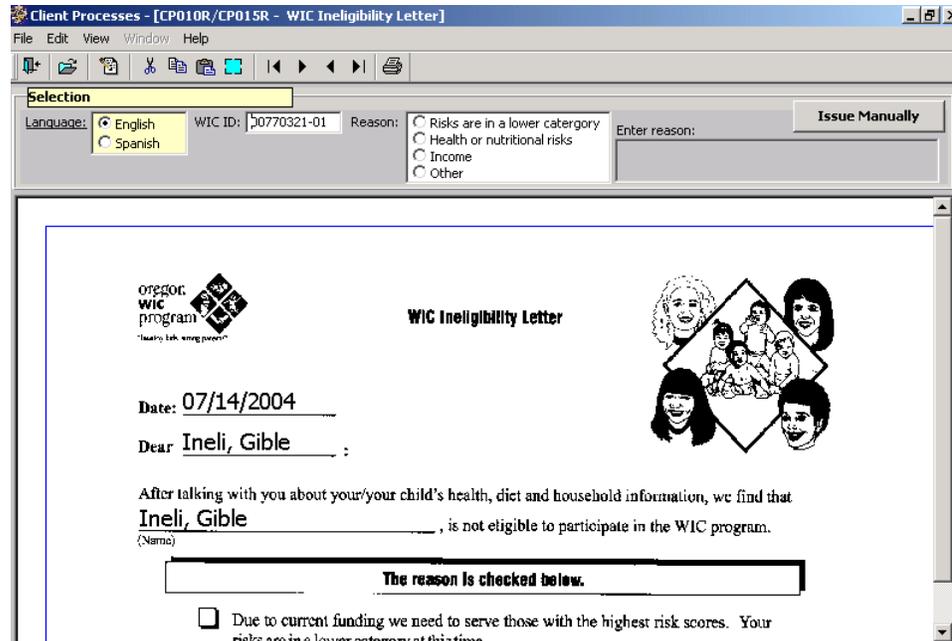


Figure 8: “WIC Ineligibility” Screen with notice

- The notice will display.
 - Use the scroll bars to the right and at the bottom to view the entire notice.
5. **Click the “Print” icon to print the notice.**
 6. **Click on the “Issue Manually” button, instead of completing steps 2 to 5.**

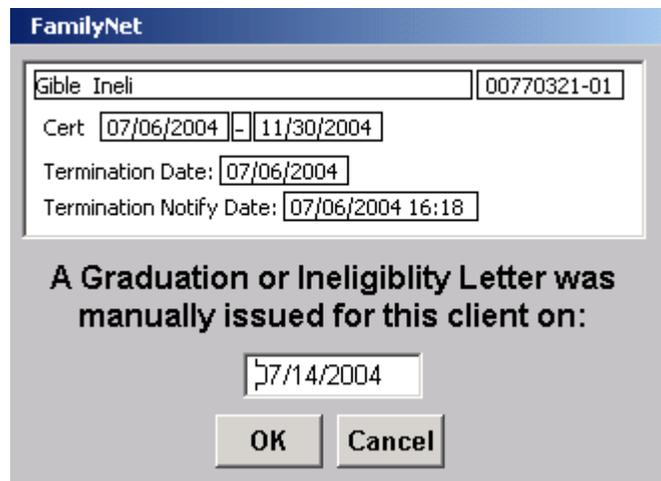


Figure 9: “Manually Issued” Pop-Up

7. After verifying the data is correct, click “OK.”

- Use this process to manually issue a notice to the participant. This documents the date of notification in TWIST.
- The date may be changed if necessary.
- If the date entered is not valid, you will get an error message and returned to the pop-up to correct the date.

8. Exit.***Printing a Termination/Graduation Notice On Demand***

You may print a termination/graduation notice for a client on demand.

Starting point for this section is:

Client Processes ⇒ Outputs ⇒ Documents ⇒ Termination Notice

1. Retrieve the client for whom you wish to print a termination notice.**2. Select the appropriate language by clicking in the corresponding circle.****3. Select the “Reason” by clicking the appropriate circle.**
If “Other” is selected type the reason in the “Enter Reason” field.**4. Click the “Run” icon.**

- The notice will display.
- Use the scroll bars to the right and at the bottom to view the entire notice.

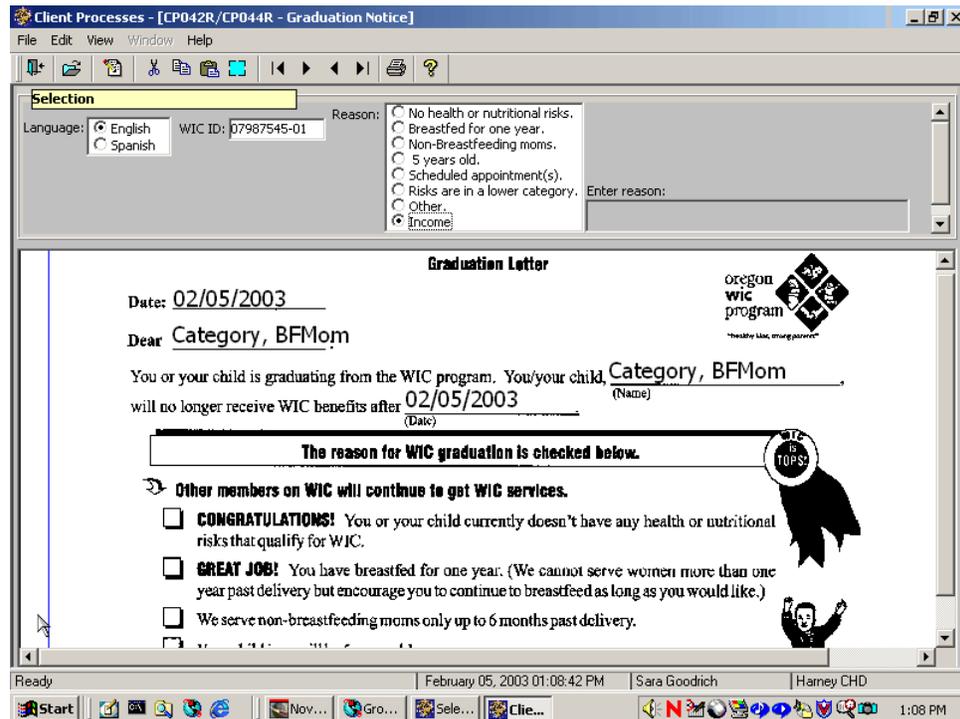


Figure 10: “Graduation Notice” Screen with Notice

5. Click the “Print” icon to print the notice.

Manually Entering “Term Date of Notification” When Providing a Manually Issued Graduation Notice

6. Click on the “Issue Manually” button, instead of completing steps 2 to 5.

Figure 11: “Manually Issued” Pop-Up

FamilyNet

Gible Ineli 00770321-01

Cert 07/06/2004 - 11/30/2004

Termination Date: 07/06/2004

Termination Notify Date: 07/06/2004 16:18

A Graduation or Ineligibility Letter was manually issued for this client on:

07/14/2004

OK Cancel

7. **After verifying the data is correct, click “OK.”**

- Use this process if it is inconvenient to print a notice in TWIST and a hand completed notice is being issued to the participant. This documents in TWIST the date of termination notification.
- The date may be changed if necessary.
- If the date entered is not valid, you will get an error message and returned to the pop-up to correct the date.

8. **Exit.**

Printing Batch Ineligibility or Graduation Notices

As part of End of Day, End of Month, or Batch Print processes, TWIST will identify any clients who:

- Were ineligible during that time period and did not have an Ineligibility Notice printed by the system or date of notification entered into the system;
- Were terminated during that time period and did not have a Graduation Notice printed by the system or date of notification entered into the system; or
- Will be termed the following month because they will be categorically ineligible (Soon to Grad).

TWIST will produce the appropriate notices and place them on the website to be opened and printed by a local agency staff person. These notices must be printed and mailed to clients in accordance with Policy 636.

♪ NOTE: Notices will stay on the website until the 27th of the following month. They must be printed and mailed in a timely fashion. See Policy 636 for details.

Notices will be batched together and placed on the website each week on Sunday night. Notices are in PDF format.

1. **Access the internet and go to <http://famnet.hr.state.or.us>**

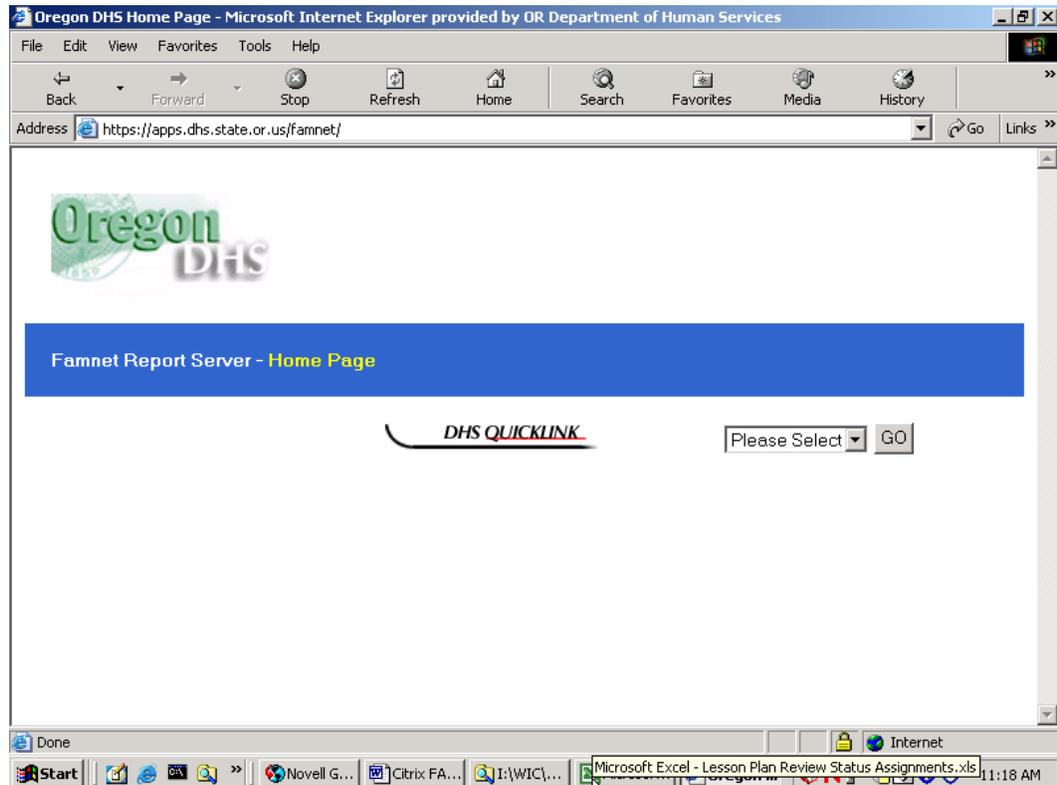


Figure 12: Internet Site

2. **Select your agency name from the drop down and click Go.**
3. **In the pop-up, enter your user name and password.**



Figure 13: Login Pop-up

♪ NOTE: User names and passwords for this screen are different than those set by your agency staff. These must be set by state IS staff since they allow access to the state website. Have your local agency coordinator call Application Support for a login and password, if you need to have access to this site.

4. **Click on the file of notices you wish to open.**

- The naming convention for the files is clinic number, notification type, language, date run.

Example: "02GradEng0330.PDF" are graduation notices for clinic 02 in English that were produced on March 30.

5. **Print the selected notices.**

Printing Mailing Labels for Batch Notices

TWIST will print mailing labels for specific batches of ineligibility or graduation notices. These labels are formatted for standard three-across Avery mailing labels. Each label will have the WIC ID number for the client at the top.

The starting point for this section is:

Client Processes ⇒ Outputs ⇒ Documents ⇒ Client Mailing Labels

1. **Select the clinic for which you wish to print labels.**

- 1.1 If you leave the "Language" and "Notice Type" fields blank, all clients having any kind of notice to be printed for the date selected will have a label produced in one file.

- 1.2 Selecting a “Language” or “Notice Type” will limit the mailing notices to be printed to those matching that selection criterion.
2. **Select the date of the batch of notices for which you wish to print labels.**

Figure 14: “Client Mailing Labels” Document

- 2.1 Dates will correspond to the weekly dates notices are placed on the

website.

3. **Click “Run.”**
 - 3.1 TWIST will print three labels with the type of notice the participant will be receiving. For example, the words “Graduation English” will print on three labels, followed by the appropriate mailing labels, then the words “Ineligibility English” will print on three labels, followed by the appropriate mailing labels and so on.
4. **Click “Print.”**

✂ Tips and Shortcuts:

- From the “Enrollment” screen you may fast path to:
 - “Client Master Demographics”
 - “Family Appointments”
 - “Infant/Child Certification”
 - “View Client Status”
 - “Woman Certification”
- TWIST will automatically produce ineligibility or graduation notices weekly for those clients without documented notification.
- A client must have a WIC ID number before an ineligibility letter can be printed or a date of notification can be entered.

↪ Practice Activity:

Use the information from your 📄 Activity Sheet to complete the activity.

The starting point for this section is:

Client Processes ⇒ Enrollment and Intake ⇒ Enrollment

1. Retrieve the client from the Activity Sheet.
2. Click “WIC Intake.”
3. Verify transaction type is “C.”
4. Verify certification end date is a future date.
5. Click the “Change Transaction Type” button.
6. Check the “Termination” box.
7. Click “OK” to close the pop-up.
8. Enter today’s date in the “Term Date” field.
9. Select “Client” as the “Term Type.”
10. Save.
11. Click the “Termination/Ineligibility Reasons” button.
12. Select “Abuse of Program” as the reason for termination.
13. Click “OK” to close the pop-up.
14. Click “Yes” to go to the “Graduation Notice” screen and close the pop-up.
15. Select English as the language.
16. Select “Other” as the reason.
17. In the “Enter reason” field type “Dual participant.”
18. Click the “Run” icon.
19. Use the scroll bars to view the entire notice.
20. Click the “Print” icon to print the form.
21. Exit back to “Client Processes.”

✓ Skill Check:

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

The client is a child who is in for recertification. She no longer has a nutritional risk. Follow the appropriate steps to “Graduate” this client.

📝 Notes

