

## Chapter 3: Client Processes

### Section 9: Second Nutrition Education Contact

#### Lesson 900: Individual Follow-ups

##### **Objectives:**

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

- Understand the impact of adding a risk to a client record at a follow-up visit;
- View NE information at a follow-up visit;
- Access and print diet assessment summary; and
- Explain the purpose of status and date end fields.

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

- ◆ 625 Nutritional Risk Assessment
- ◆ 661 Competent Professional Authority/High Risk Counseling
- ◆ 820 Nutrition Education: Participant Contacts
- ◆ 830 Nutrition Education: Documentation

##### **Overview:**

Second nutrition education individual follow-ups function almost the same in TWIST as first nutrition education contacts. However, there are some fundamental differences in the types of contact. At the individual follow-up, the information in TWIST serves as a historical reference of previous visits and allows the user to update that information.

With TWIST, the user can update any client information, but the result of updating varies. This lesson provides information on how to update information, provide revised information to the client, and an introduction to situations that are unique to the individual follow-up.

Policy requires that you document any new medical data and topics discussed.

##### **Instruction:**

##### **Accessing the “Last Visit Summary” Screen**

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Infant/Child or Woman ⇒ Nutrition Education Plan

1. Retrieve the client for whom you want to view information.
2. Review the client's information on the "Last Visit Summary" screen.

The screenshot shows the 'Last Visit Summary' screen for a client named 'Pregnant, Woman' with DOB 10/10/1975. The screen is divided into several sections:

- Selection:** WIC ID: 00773326-01, Name: Pregnant, Woman, DOB: 10/10/1975, WIC Cat.: WOMAN, PREGNANT, Tr.Type: N.
- Medical Data:** Health History, Diet Assessment, NE Plan, Progress Notes, BF Tracking, Food Pkg. Assignment.
- Risk Codes:**

Cert/R/C Date	Risk Code	Risk Factors
11/19/2002	402	VEGAN DIETS
11/19/2002	101	PREPREGNANCY UNDERWEIGHT
- Goals:**

Visit Date	Goal	Status	Certifier Name
11/19/2002	Eat a pear as a snack everyday.	In Progress	Julia Hansel
- NE Visits:**

Visit Date	Appt. Type	Class Title	Attended
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At the bottom, there are tabs for 'Last Visit Summary', 'Risks/Interventions', 'NE Provided', 'Goals', 'Referrals', and 'Next Appointment'. The 'Last Visit Summary' tab is active. A red spider icon is visible in the center of the screen.

**Figure 1: "Last Visit Summary" Screen**

This section is populated with the client's information from the last visit but is display only.

♪ NOTE: Information may not be changed on this screen.

### ***Adding a Risk to a Client Record at Follow-Up Visit***

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Infant/Child or Woman ⇒ Nutrition Education Plan

1. Retrieve the client for whom you want to update information.
2. Click on the "Risk/Interventions" tab.

**Figure 2: “Risk/Interventions” Screen**

- Adding the risk is the same functionality as covered in Chapter 3, Lesson 300 *Risk Criteria and Level*.
- At follow-up visits during mid-certification, the user can add risks to a client’s record. Doing this does not cause the client to lose risks.
- The only difference between adding risk(s) at the follow-up visit versus at recertification is that at the follow-up visit the certifier is not assessing risks already assigned and therefore cannot remove any risks.

♪ NOTE: You can add new information on any certification screen by clicking on the insert icon.

### **Viewing Nutrition Education Provided at Past Visits**

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Infant/Child or Woman ⇒ Nutrition Education Plan

1. **Retrieve the client for whom you want to view information.**
2. **Click on the “NE Provided” tab.**

Figure 3: “NE Provided” Screen

- Here you can view nutrition education that was provided in the past.
- Refer to Chapter 3, Lesson 402 *Nutrition Education Provided* for information on how to add nutrition education provided.

### Updating Client Goal Status

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Infant/Child or Woman ⇒ Nutrition Education Plan

1. Retrieve the client for whom you want to update the **Next Steps** status.
2. Click on the “**Next Steps**” tab.

Figure 4: “Goals” Screen [RB1] Next Steps Screen

3. In the “NE Plan” section, tab to the “Next Steps” field.
  - If the client’s “Next Steps” have changed since the first visit, there is a drop down menu to change the status.
  - If the status is changed, the “Date Ended” field is auto filled with the current date. This date is modifiable.
  - If the “Next Steps” status is changed to or remains as ‘not ready’ or ‘in progress’, the “Date Ended” field is grayed out as 00/00/0000 and is not modifiable.

### ↪ Practice Activities:

Use the client from your ☛ Activity Sheet for this practice.

The starting point for this activity is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Diet Assessment

1. Retrieve the client for whom you want to update information.
2. Click on the “Risk Factors” tab.
3. Add a risk to the client’s record.
4. Click on the “NE Plan” section to update the NE plan.
5. Click on the “NE Provided” tab to record the NE provided.
6. Click on the “Next Steps” tab to update the client’s planned step(s).

7. Tab to the “Status” field and change the status of the client’s **planned step(s)**.
8. Save.
9. Exit.

**✓ Skill Check:**

Retrieve a certified client from **client primary**[RB2].

Your client has come in for an individual follow up appointment. She has cerebral palsy and recently was hospitalized for leg surgery. Her previous “**next steps**” was to increase her intake of fruits and vegetables. The assessment today shows that she is now eating 5 servings of fruits and vegetables a day.

Update her Risk **Factors** and “**Next Steps**” status. *Print each screen when completed.*

**✍ Notes:**