

## **Chapter 3: Client Processes**

### **Section 9: Second Nutrition Education Contact**

#### **Lesson 901: Documenting Non-WIC Nutrition Education**

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

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

- Operate “Schedule Non-WIC NE” button;
- Identify when to use “Schedule Non-WIC NE” versus “Schedule Appointment” buttons; and
- Document nutrition education provided by an outside agency.

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

- ◆ 800 Nutrition Education: Introduction and Overview
- ◆ 810 Nutrition Education: Making Education Available
- ◆ 820 Nutrition Education: Participant Contacts
- ◆ 830 Nutrition Education: Documentation
- ◆ 835 Nutrition Education: Attendance or Refusal

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

Clients may receive nutrition education from non-WIC organizations. You can document and view this education in TWIST on the “Next Appointment” screen. In this lesson you will learn how to record and view non-WIC appointments.

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

##### ***Documenting Non-WIC Nutrition Education***

The starting point for this section is:

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

1. **Click on the “Next Appointment” tab at the bottom of the screen.**
2. **Retrieve the client for whom you want to document non-WIC education.**
3. **Click the “Schedule Non-WIC NE” button in the lower right hand corner.**

The screenshot displays the 'Client Processes' application window. At the top, the title bar reads 'Client Processes - [CP3115 - Woman Certification State ID:2873724 Name: Visit, Last DOB:09/01/1980]'. Below the title bar is a menu bar (File, Edit, Window, Help) and a toolbar. The main area is divided into several sections. The 'Selection' section at the top contains fields for WIC ID (D0851843-01), Name (Visit, Last), DOB (09/01/1980), WIC Cat. (WOMAN, PREGNANT), and Tr.Type (N). Below this are tabs for Medical Data, Health History, Diet Assessment, NE Plan, Progress Notes, BF Tracking, and Food Pkg. Assignment. The 'Non - WIC Appointment History' section shows a table with columns for Organization Name, Class/Individual, Topic, Class Title Or Subject, Date, and Status. A record for 'CP2405 - Schedule Non - WIC NE' is highlighted. Below the table is the 'Non - WIC Nutrition Education' form, which is the focus of the pop-up. It includes a dropdown for Organization Name, text fields for Address and Phone, dropdowns for Class / Individual Follow Up and Topic, a date field for Date (00/00/0000), a dropdown for Status, and a text field for Class Title or Subject. An Instructor field is also present. 'OK' and 'Cancel' buttons are at the bottom right of the form. At the bottom of the application window, there are buttons for 'NE Refusal', 'Schedule Non-WIC NE', and 'Schedule Appointment'. The status bar at the very bottom shows 'Ready', the date and time 'December 01, 2005 02:08:15 PM', the user 'Sara Goodrich', the workstation 'Baker CHD', and the network path 'dhs-oltp4p-prod1 / famnet'. The Windows taskbar is visible at the bottom of the screen.

Figure 1: “Schedule Non-WIC NE” Pop-Up

4. **Complete the “Organization Name” field by selecting the appropriate organization from the drop-down list.**

The name, address and phone number will be populated by the system from the Referral Organizations table in Operations/Management.

5. **Use the drop-down lists to complete the “Class/Individual Follow-Up” and the “Topic” fields.**

6. **Tab to the “Class Title or Subject:” field and enter the appropriate information.**

7. **Enter the date of the education in the “Date” field.**

This date can be in the past, current, or in the future.

8. **Tab to the “Status” field and select the correct status from the drop-down list.**

9. **Enter the instructor’s name in the “Instructor” field.**

10. **Click “OK” to save your work and close the pop-up, or “Cancel” to close the pop-up without saving the information.**

The information is displayed on the “Non-WIC Appointment History” screen.

11. **Save.**

12. **Exit.**

### **✂ Tips and Shortcuts:**

- If you discover that you need to change the information in the “Non-WIC Appointment History” screen, double click on the row you wish to modify. This will open the pop-up and allow you to make changes.
- A client who attends a Non-WIC nutrition education activity will need to contact the WIC clinic for benefits issuance.

### **↪ Practice Activity:**

The starting point for this section is:

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

Use the 🖨 Activity Sheet to complete this activity.

1. Select the client for whom you want to document non-WIC nutrition education.
2. Click the “Schedule Non-WIC NE” button.
3. Select La Leche League as the “Organization Name.”
4. Tab to the “Class/Individual Follow-Up” field.
5. Select “Class” from the drop-down.
6. Tab to “Topic.”
7. Select a breastfeeding topic.
8. Tab to the “Class Title or Subject.”
9. Enter “Breastfeeding is great!”
10. Enter tomorrow’s date in the “Date” field.
11. Mark the “Status” as “Booked.”
12. Leave the “Instructor” field blank.
13. Click “OK” to save your work and close the pop-ups.
14. Exit back to the “Client Processes” window.

 **Notes:**