Chapter 3: Client Processes
Section 6: Certification Variables
Lesson: Breastfeeding Tracking

Objectives:

Upon completion of this lesson the user will be able to:
- utilize the "**BF Tracking**" screens;
- document breast pump issuance; and
- update breast pump issuance record;
- record a breastfeeding contact.

Oregon Policies:

710   Breastfeeding: Definition, Promotion and Support Standards
712   Breastfeeding: Breast Pump Ordering, Distribution and Tracking
            Guidelines
716   Breastfeeding Peer Counseling (BFPC) Program Requirements

Overview:

TWIST has a special set of screens used to collect information on the breastfeeding mother and infant. The "**Breastfeeding Tracking**" screens found on the woman's certification screen will assist in educating and supporting pregnant and breastfeeding women and are used to track breast pump issuance and to record contacts specific to breastfeeding.

Instruction:

Completing the Questionnaire

The starting point for this lesson is:
         Client Processes ⇨ Certification ⇨ Women ⇨ Breastfeeding Tracking

Figure 1: "BF Tracking – Questionnaire" Screen

1. **Retrieve the client for whom you want to enter breastfeeding tracking information.**

2. **From the "Questionnaire" field select the appropriate questionnaire from the drop down list.**

3. **Tab to the "Contact Date" field.**

   - This field defaults to today's date but may be modified.
   - The **"Entered By"** field defaults to the user's login ID.

4. **Tab to the "Show" field.**

   - From this drop down menu you may select to display **"All"** questions or only **"mandatory"** questions.
   - The questions will be displayed in the **"Questionnaire"** section of the screen.

5. **Enter the appropriate answer for each question.**

   - Answers are entered by selecting from the drop down list or manually entering specific information such as a date.
   - Certain answers may generate additional questions or pop-ups.

- Click in the question field and scroll over to view the entire question.
- Clicking **"OK"** will save the answers and close the pop-up.
- Clicking **"Cancel"** will close the pop-up.

♫ NOTE: Information can be changed the day the contact visit is entered by accessing the screen and modifying the answer.

6. **Double click in the "Notes" field.**

   - This opens the **"Question Notes"** pop-up and allows you to enter a free form note, as needed.
   - A note may be entered for each answer.

7. **Click "OK" to save the note and close the pop-up.**

   - Clicking **"Cancel"** will close the pop-up without saving the note.

8. **Save.**

Accessing Questionnaire History

Previous "Breastfeeding Tracking" questionnaires can be viewed at any time utilizing the "**History**" button.

The starting point for this lesson is:
Client Processes ⇨ Certification ⇨ Women ⇨ Breastfeeding Tracking ⇨ Questionnaire

1. **Retrieve the client for whom you want to view breastfeeding information.**

2. **On the "Questionnaire" screen, click the "History" button.**
   The "**Questionnaire History**" pop-up is displayed.

3. **Select the questionnaire you want to view and click "OK."**

   - The questionnaire is displayed.
   - The questionnaire is view only and cannot be modified unless it was created today.
   - To close the pop-up without selecting a questionnaire, click **"Cancel."**
   - To view another questionnaire, click the **"History"** button and repeat the process.

4. **Exit.**

Completing the "Contacts" Screen

This sub-tab is used to record contacts with participants that are specific to breastfeeding and to create a call back tickler if desired.

The starting point for this lesson is:
> Client Processes ⇨ Certification ⇨ Women ⇨ Breastfeeding Tracking ⇨Contacts
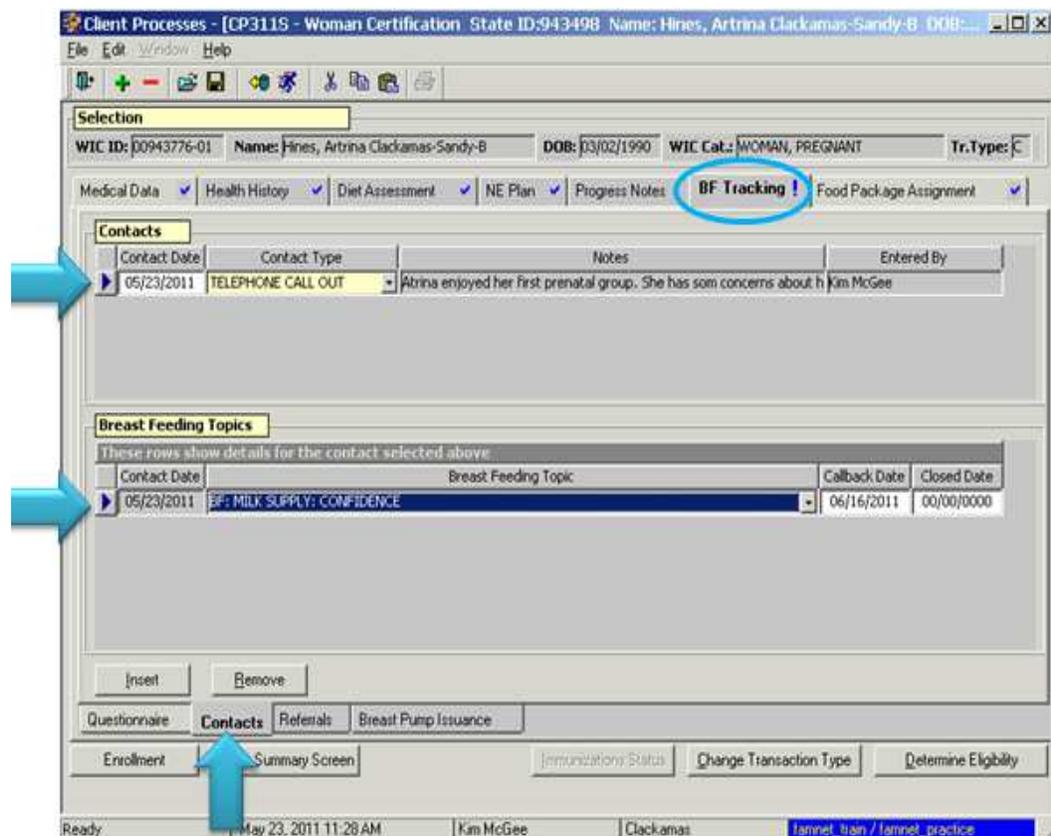

Figure 2: "BF Tracking – Contacts" Screen

1. **Click on the "Contacts" tab.**

    The **"Contact Date"** and the **"Entered By"** fields default to today's date and the person entering the contact, but can be modified.

2. **Select the type of contact from the drop down list in the "Contact Type" field.**

3. **Double click on the "Notes" field to write a note. This field is optional.**

4.   **To enter a breastfeeding topic for the "contact", click the "Insert" button in the lower left corner to generate a blank row in the "Breastfeeding Topics" section.**

5.   **Complete the "Breastfeeding Topic" field by selecting the appropriate topic from the drop down list. The breastfeeding topic documents what was discussed at the contact it is associated with.**

♪ NOTE: The **"Callback Date"** and **"Closed Date"** are optional fields. A breastfeeding topic must be entered in order to enter a call back date. If a callback date has been entered the client will show on the **"Breastfeeding Tracking Function Call Back"** report if the date entered is within the report parameters. If the closed date is completed the participant will no longer show on the **"Breastfeeding Tracking Function Call Back"** report.

6.   **To display the "Breastfeeding Topic" history, click on the "Contact Date". Breastfeeding topics for that date will show in "Breastfeeding Topics" section.**

Figure 3: "Breastfeeding Topics"

Completing the "Referrals" Screen

The starting point for this lesson is:
          Client Processes ⇨ Certification ⇨ Women ⇨ Breastfeeding Tracking

1.   **Click on the "Referrals" tab.**

       The "**Contact Date**" field defaults to today's date but can be modified.

2.   **Tab to the "Organization" field and select the appropriate
       organization from the drop down list.**

       The "**Phone Number**" will be displayed.

3.   **Select the appropriate status from the drop down list.**

   - The **"Date Ended"** will be generated by the system if the **"Status"** is
     marked **"Completed."**
   - For all other status selections the **"Date Ended"** will be disabled and
     displayed as **00/00/0000**.

4.   **Click the "Insert" icon to add a second row.**

5.   **Click the "More Info." button in the lower right corner.**

   - The **"Referrals from WIC"** pop-up is displayed with detail information
     about the organization.
   - To print the information for the client, click **"Print."**
   - To close the pop-up, click **"Close."**

6.   **Save.**

Breast Pump Issuance

This sub-tab is used to record what type of breast pump has been given to a
woman and tracks the return of multi-user pumps. Breast pumps must be entered
into inventory before they are available on these screens for issuance. For more
information see Chapter 8, Lesson 104 *Breast Pump Inventory and Tracking
Reports*.

The screen consists of two sections, "**Contact Info**" and the issuance record.

Figure 4: "Breast Pump Issuance" Screen

Contact Info will be auto-filled from Client Master with the address type, address, and phone number, and phone number type.

Issuing a Lactina or EnDeare

Figure 5: Lactina or EnDeare Issuance

1. **The "Date Issued" field defaults to today's date but can be modified.**

2. **Select "Hospital-Grade Breast Pump (Lactina)" or "Multi-User Breast Pump (Hygeia EnDeare)" from the drop down list in the "Type" field.**

3. **Enter the "Serial #" shown on the pump. Include the H with the Hygeia serial #.**

4. **Enter the date the pump is due to be returned by the client in the "Pump Due Date" field. This field can be modified at any time. If this date is within the date parameters on the "Multi-**

User Pump Tracking" report, the participant will show on that report.

♫ NOTE: The "**Extended Due Date**" field is optional. Using this field allows the user to retain the original "**Pump Due Date**" information.

Alternate Contact	Alternate Contact Relationship	Alternate Contact Phone	Notes
Mary Goodfriend	Friend	503-254-9454	

Figure 6: Alternate Contact Information

5.   **Complete the "Alternate Contact" field with the alternate contact's first and last name.**

6.   **Complete the "Alternate Contact Relationship" field with the relationship of the alternate contact to the WIC client.**

7.   **Complete the "Alternate Contact Phone" field with the phone number of the alternate contact.**

8.   **Double click in the "Notes" field to open the "Breast Pump Issuance Notes" field and enter a free form note. This field is optional.**

9.   **Once "Save" is performed the "Partner Pump" field will display "Yes" if the pump belongs to a WIC Breast Pump Partner or "No" if the pump belongs to your agency.**

Issuing Other Breast Pumps

	Date Issued	Type	Serial #	Partner Pump	Lactina Due Date
▶	04/15/2006	Hospital-Grade Breast Pump (Lactina)	100000	NO	04/30/2006
	04/15/2006	Double Pumping Accessory Kit		NO	00/00/0000

Figure 7: Pump Issuance

1.   **The "Date Issued" field defaults to today's date but can be modified.**

2.   **Select the desired pump or pump accessory from the drop down list in the "Type" field.**

♫ NOTE: Issuance of a Lactina, EnDeare or Pump-In-Style will be indicated on the **"Family Summary Screen"**. See Chapter 3, Lesson 1100 *Family Summary Screen* for more information.

♫   NOTE: To add an additional row, click the **"Insert"** icon. To remove a row, click the **"Remove"** icon. Once **"Save"** is performed the row cannot be removed.

Entering a Return Date for a Lactina or EnDeare Pump

1.   **Complete the "Date Returned" field when the pump is returned. Entering a date in this field will remove the "Pump Due Date" reminder box in the "Family Summary Screen" and will remove the participant from the "Multi-User Pump Tracking" report.**

Referring an Overdue Lactina or EnDeare to the State

1.   **Click in the "Referred to State" field to place a check mark in the box.** Refer to Policy 712 in the WIC Program and Policy Manual for more information on referring a client with an overdue pump to the State WIC office.

2.   **Type in the date the overdue breast pump was referred to the State WIC office in the "Referral Date" field.** This field becomes mandatory when the "Referred to State" field is completed.

↪ *Practice Activities:*

The starting point for this lesson is:
   Client Processes ⇨ Certification ⇨ Women ⇨ Breastfeeding Tracking ⇨ Questionnaire

1.   Click the "Open" icon to access "Client Search" and select a client for whom you want to enter Breastfeeding Tracking information.
2.   Click the "Return with Client" button.
3.   Select the appropriate questionnaire.
4.   Leave "Contact Date" as today's date.
5.   Tab to the "Show" field and select All.
6.   Complete all answers to the questions using any information you want.
7.   Save your work.
8.   Click the "Contacts" tab and add a contact with today's date.
9.   Select "Home Visit" as the contact type.
10. Enter a note.
11. Add a breastfeeding topic of your choice with today's date.
12. Leave the "Callback Date" and "Resolved Date" blank.
13. Click the "Referrals" tab and add a referral with today's date.
14. Select an organization of your choice and select "Completed" for the status.
15. Save your work and exit the screen.

✍ *Notes:*