

Chapter 3: Client Processes
Section 1: Intake
Lesson: Applicant Prescreening

Objectives:

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

- prescreen and enter a participant;
- determine if a potential participant is eligible and follow the appropriate process;
- differentiate between a Prescreening and an Enrollment transaction;
- complete the Income screen;
- complete the Intake screen;
- complete a wait list transaction; and
- issue and change WIC ID number.

Oregon Policies:

- ◆ 485 WIC Family ID Number and ID Card
- ◆ 540 Proxy System
- ◆ 605 Processing Standards
- ◆ 617 Income Eligibility: Determination of Income Eligibility

Overview:

The first step in the WIC process is screening potential participants for eligibility. In TWIST you can do this by entering or updating preliminary information on the potential participant in the Applicant Prescreening window and the Client Primary database. The Applicant Prescreening window is particularly useful when you just want to determine the income eligibility of a potential participant who is on the phone or is a walk-in. If the potential participant is income eligible, you would also use this window to either set up an appointment or put the person on a wait list.

In this lesson you will learn how to screen for eligibility by collecting income information, select the applicant's possible clinic and category, generate a temporary WIC ID number, wait-list an applicant, and record any notes. Using the Client Primary screens is covered in a separate lesson.

Instruction:**Income Eligibility**

The starting point for this lesson is:

Client Processes ⇒ Enrollment & Intake ⇒ Applicant Prescreening

This window is divided into two sections.

Income Provider	Interval	Amount	Source	Proof of Income	Monthly	Annual
	MONTHLY	1,000.00	WAGES	PAY STUB	1,000.00	12,000.00
Totals:					1,000.00	12,000.00

Figure 1: “Applicant Prescreening” Window

- The top part of the window is titled “**Selection.**” This section is blank until a client is selected from Client Primary.
 - Income information may be entered without selecting a participant. To save information a participant must be selected.
 - The lower section contains 3 tabs - “**Income Eligibility,**” “**WIC Intake**” and “**WIC Notes.**”
1. **Tab to the “Calculate Income For” field and choose “Client” or “Family” from the drop down list.**

This field defaults to “**Family.**” You would choose “**Client**” to calculate income for a foster child. Otherwise the income calculation will be applied to all WIC participants who share the same family ID number.

♪ NOTE: Proof of ID and Proof of Residency are in this screen, but this documentation is neither collected nor required until Enrollment.

2. **Tab to the “No. in Family” field and enter the number of household members.**

Example: If the applicant is a woman who is pregnant with twins and has no other family members in her household, you would enter this value as “1.”

3. **Tab to the “Unborn Counted” field and enter the number of babies being carried by a pregnant woman.**

Example: Following the example above you would enter this value as “2” for the pregnant woman’s twins.

♪ NOTE: TWIST adds the “**No. in Family**” and “**Unborn Counted**” to calculate total number in family when determining income.

4. **Tab to the “New Income Date” field.**

The system automatically defaults to today’s date.

5. **Tab to the “SNAP” field and select yes or no from the drop down list.**

6. **Tab to the “Oregon Health Plan” field and select yes or no from the drop down list.**

7. **Tab to the “TANF” field and select yes or no from the drop down list.**

♪ NOTE: Selecting “Yes” for “**SNAP**,” “**Oregon Health Plan**,” or “**TANF**”, indicates the participant reports participating in one of those programs. They may be adjunctively eligible.

♪ NOTE: All mandatory fields must be completed before moving on to the “**WIC Intake**” tab.

8. **Tab to the “Income Provider” field and enter the name of the income provider.**

This refers to the name of the family member who provides the income amount to be entered.

9. **Tab to the “Interval” field and select the income interval from the drop down list.**

- This refers to how often the family receives the income amount to be entered.

- If **“Annually”** is selected as the income interval TWIST calculates the income amount as one payment per year.
- **“Every 2 Months”** calculates as 6 payments in one year .
- **“Every 2 Weeks”** calculates as 26 payments in one year.
- **“Daily”** calculates as 210 payments in one year.
- **“Hourly”** calculates for a 40-hour work week.
- **“Monthly”** calculates as twelve payments in one year.
- **“Quarterly”** calculates as four payments in one year.
- **“Twice a month”** calculates as 24 payments in one year.
- **“Twice a week”** calculates as 104 payments in one year.
- **“Twice a year”** calculates as two payments in one year.
- **“Weekly”** calculates as 52 payments in one year.
- If the client does not match one of these intervals calculate the interval most consistent with the participant’s work schedule.

Example: If a participant works part-time (i.e. 20 hours per week) you would calculate her income based on a “Weekly” income interval.

10. **Tab to the “Amount” field and enter the amount of income the client receives for this interval.**

- TWIST determines income eligibility automatically once the amount for an income interval is entered.
- If the amount of income entered exceeds the guidelines, a message is displayed stating, *“The Client is not Income Eligible. Do you want to print an Ineligibility Notice?”*
- Select **“No”** to close the pop-up without printing the notice.

♪ NOTE: Selecting **“Yes”** will produce a notice even if you have not saved the participant’s information. Refer to Termination/Eligibility lesson for printing WIC ineligibility letters.

- If the participant is over-income and pregnant go back to the **“Unborn Counted”** field and make sure you have entered the number of babies she is carrying.
- If the participant is income eligible, nothing will appear and you may continue.

11. **Tab to the “Source” field and select the source of the income from the drop down list.**

This refers to the type of income entered.

♪ NOTE: Proof of Income is collected at Enrollment.

12. **Press “Tab” to create another line to enter additional income.**
 - TWIST will automatically calculate the monthly and annual salary amounts based upon the information you entered for each line.
 - Cumulative totals are also calculated for all lines and displayed in the “**Totals**” fields.

↳ **Practice Activity #1:**

You will be screening a participant on the phone for income eligibility.

1. From the “Client Processes” module, click on “Enrollment and Intake.”
2. Click on “Applicant Prescreening.”
3. Select **Family** for the “Calculate Income For” field.
4. Enter information for “Proof of ID” and “Proof of Residence.”
5. Enter the “No. in Family.”
6. Enter “Unborn Counted.”
7. In the “New Income Date” field, leave the default as today’s date.
8. Enter information for the “Food Stamps,” “OHP,” and “TANF” fields.
9. Enter the “Income Provider” name.
10. Select the income “Interval” from the drop down list.
11. Enter the “Amount” of income received for this interval.
12. Enter the “Source” of income from the drop down list.
13. Select the “Proof of Income” from the drop down list.

Income Averaging

The starting point for this lesson is:

Client Processes ⇒ Enrollment & Intake ⇒ Applicant Prescreening

Some participants do not receive the same amount of income at each pay period. TWIST will assist you in calculating the average income for these individuals.

1. **Click the “Averaging” button in the lower right hand corner.**

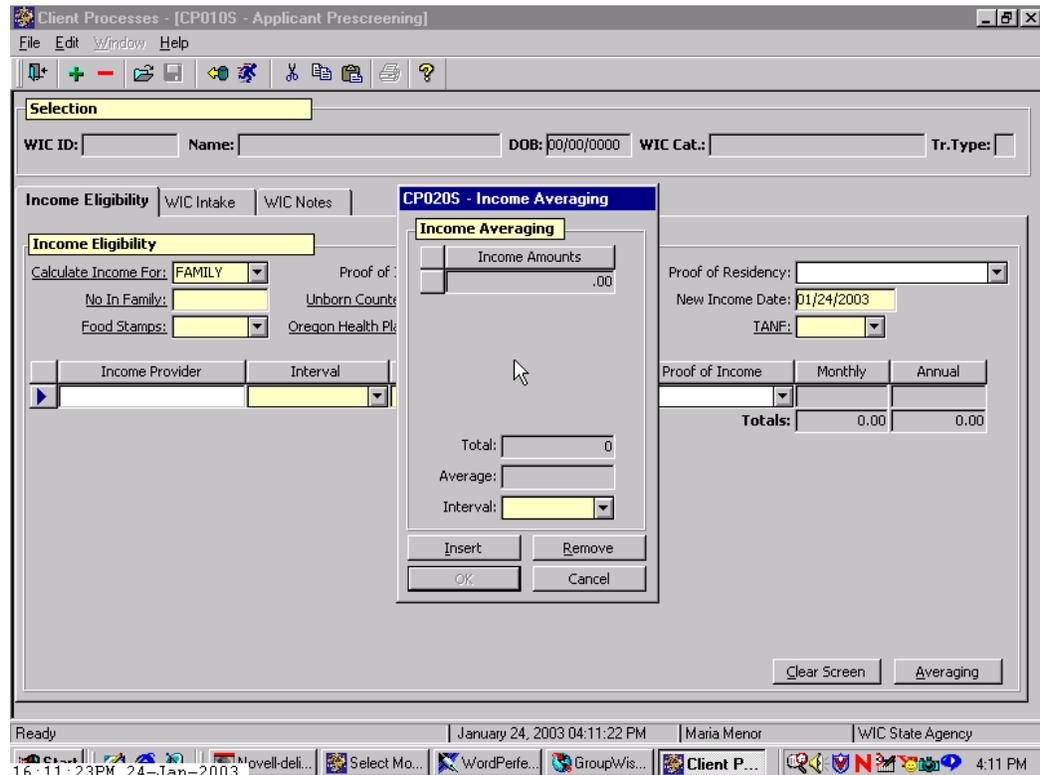


Figure 2: “Income Averaging” Pop-Up

2. **Click in the “Interval” field and select the appropriate pay period interval.**

🎵 **NOTE:** You can average income amounts for only one pay period interval; i.e., you cannot average a monthly income amount with a weekly income amount.

3. **Place the cursor in the “Income Amounts” field and enter the first income amount.**
4. **Tab to create a second blank row and enter the second income amount.**
 - You may continue to create additional rows to accommodate all amounts.
 - The “**Insert**” button may also be used to create additional rows.
5. **Click the Remove button to delete a row.**

A message is displayed asking “*Are you sure you wish to remove this row?*” Select “**Yes**” to remove the row or “**No**” to cancel the request.

♪ NOTE: TWIST calculates the Total and Average amounts as income is entered or removed. It will display the total once you click “OK” or tab off the field.

6. **Click “OK” to close the “Income Averaging” pop-up.**

The “Interval” and “Amount” are inserted into a new line of income information.

7. **Complete the “Source” and “Proof of Income” fields.**

♪ NOTE: The “Clear Screen” button in the lower right hand corner will remove all information on the screen.

♪ NOTE: Income information may not be saved until a participant has been selected.

↳ **Practice Activity #2:**

Use the information for the participant from your ◀ Activity Sheet for this practice. You will be screening a participant on the phone for income eligibility.

1. From the “Client Processes” module, click on “Enrollment and Intake.”
2. Click on “Applicant Prescreening.”
3. Select **Family** for the “Calculate Income For” field.
4. Enter information for “Proof of ID” and “Proof of Residence.”
5. Enter the “No. in Family.”
6. Enter “Unborn Counted.”
7. In the “New Income Date” field, leave the default as today’s date.
8. Enter information for the “Food Stamps,” “OHP,” and “TANF” fields.
9. Click on the “Averaging” button.
10. Select the “Interval” from the drop down list.
11. Enter the “Income Amounts” for the first paycheck.
12. Tab to generate a new row.
13. Enter the “Income Amounts” for the second paycheck.
14. Press the “Insert” button to generate a new row.
15. Enter the “Income Amounts” for the third paycheck.
16. Tab to generate a new row.
17. Click “Remove” to remove the blank row created.
18. Click “OK” to close the “Income Averaging” pop-up.
19. Enter the “Income Provider.”
20. Enter the “Source” of income from the drop down list.
21. Select the “Proof of Income” from the drop down list.

WIC Intake

The starting point for this lesson is:

Client Processes ⇒ Enrollment & Intake ⇒ Applicant Prescreening

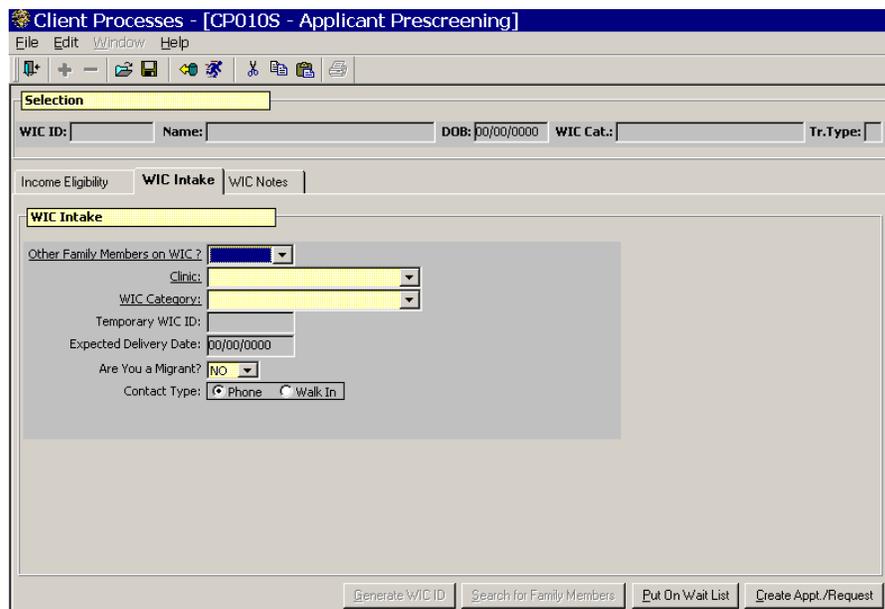
Once preliminary income eligibility has been determined in the “**Income Eligibility**” tab you must select the applicant you wish to prescreen before proceeding to the “**WIC Intake**” tab. This is done using Client Primary.

1. **Retrieve the participant whom you want to prescreen.**

- The participant information is displayed in the “**Selection**” section of the window.

🎵 NOTE: Please refer to the “Client Search and Client Demographics” lesson for instruction on searching, selecting and entering a participant.

2. **Click the “WIC Intake” tab.**



The screenshot shows the 'Client Processes - [CP010S - Applicant Prescreening]' window. The 'Selection' section at the top contains fields for WIC ID, Name, DOB (00/00/0000), WIC Cat., and Tr.Type. Below this, the 'WIC Intake' tab is active, showing a 'WIC Intake' section with the following fields: 'Other Family Members on WIC?' (a dropdown menu), 'Clinic:' (a dropdown menu), 'WIC Category:' (a dropdown menu), 'Temporary WIC ID:', 'Expected Delivery Date:' (00/00/0000), 'Are You a Migrant?' (a dropdown menu set to 'NO'), and 'Contact Type:' (radio buttons for 'Phone' and 'Walk In'). At the bottom of the window, there are four buttons: 'Generate WIC ID', 'Search for Family Members', 'Put On Wait List', and 'Create Appl./Request'.

Figure 3: “WIC Intake” Screen

3. **Select “Yes” from the drop down list in “Other Family Members on WIC?” field.**

- Selecting “**Yes**” allows family WIC ID numbers to be linked.

- See the 🎵 NOTE after step 8 if “**No**” is selected for “**Other Family Members on WIC?**”
4. **Tab to the “Clinic” field and select the appropriate clinic from the drop down list.**

The “**Search for Family Members**” button at the bottom of the screen is enabled.

5. **Click the “Search for Family Members” button.**

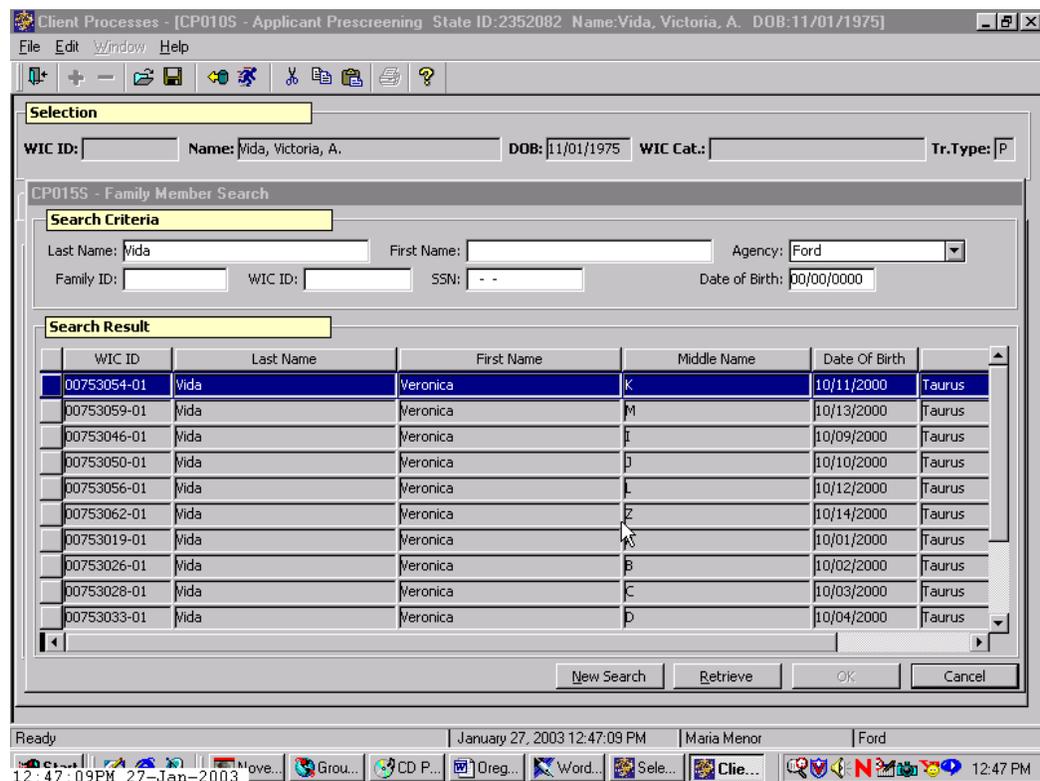


Figure 4: “Family Member Search” Pop-Up

6. **Enter the search criteria.**
- One or more fields may be completed.
 - The search is narrowed as more fields are completed.

7. **Click the “Retrieve” button to display all possible matches in the Results section.**
 8. **Select the appropriate match and click “OK” to close the pop-up.**
 - 8.1 Clicking “**Cancel**” will close the pop-up and the “**Temporary WIC ID**” field will not be populated.
 - 8.2 Clicking the “**New Search**” button will clear the screen and allow you to enter new search criteria information.
 - 8.3 If previous income information existed, a message is displayed, “*Do you wish to keep existing data?*” If “**Yes**” is selected, the income information you entered will be saved and replace the old income for the entire family.
 - 8.4 If a family member was selected, the “**Temporary WIC ID**” number field is populated once the pop-up is closed.
 - The “**Temporary WIC ID**” system-generated number is a WIC-only identifier that TWIST assigns to each applicant.
 - If a family member was selected the “**Temporary WIC ID**” number will correspond with the applicant’s family ID.
 - Once an applicant is actually enrolled TWIST removes the “**T**” from the front of the “**Temporary WIC ID**” number, which then becomes the participant’s WIC ID number.
- ♪ NOTE: If “**No**” was selected for “**Other Family Members on WIC?**” the “**Generate WIC ID**” button is enabled, and clicking the “**Generate WIC ID**” button will populate the “**Temporary WIC ID**” field.
9. **Tab to the “WIC Category” field and select the appropriate category for this participant from the drop down list.**
 - If the participant is a pregnant woman, tab to the “**Expected Date of Delivery**” field and enter the appropriate date.
 - This field is grayed out for all other categories.
 10. **Tab to the “Are you a migrant?” field.**
 - The default answer is “No”. Change the answer to “Yes” if the potential participant is a migrant.

11. **Tab to the “Contact type” radio buttons.**
 - The default selection is “Phone”, assuming that most potential participants are calling for an appointment. If the participant is physically in your office, select “Walk in.”
12. **Save.**
 - The selection section of the screen on the top part of the screen is populated.
 - This enables the “**Put on Wait List**” and “**Create Appt/Request**” buttons.
 - Creating an appointment request will be covered in a future lesson.

↳ **Practice Activity #3:**

The starting point for this lesson is:

Client Processes ⇒ Enrollment & Intake ⇒ Applicant Prescreening

1. Select **Family** for the “Calculate Income For” field.
2. Enter information for “Proof of ID” and “Proof of Residence.”
3. Enter the “No. in Family.”
4. Enter “Unborn Counted.”
5. In the “New Income Date” field, leave the default as today’s date.
6. Enter information for the “Food Stamps,” “OHP,” and “TANF” fields.
7. Click the “Open” icon to access “Client Search.”
8. Search for the client you are prescreening.
9. If the participant is not found, enter the participant’s demographic information on the “Client Primary” screen.
10. Save the information.
11. Click the “Return with Client” button.
12. Click the “WIC Intake” tab.
13. Select Yes for the “Other Family Members on WIC?”
14. Select the appropriate “Clinic” from the drop down list.
15. Click the “Search for Family Members” button.
16. Enter the participant information and click the “Retrieve” button.
17. Select the appropriate match and click “OK” to close the pop-up.
18. Select the “WIC Category” from the drop down list.
19. Enter the EDD, if applicable.
20. Click the “Generate WIC ID” button to create a temporary WIC ID number.
21. Save this information.

Wait Listing an Applicant

Applicants may be put on a wait list if no appointments are available, or you may create an appointment request (appointment requests will be handled in another lesson).

1. Click the “Put on Wait List” button.

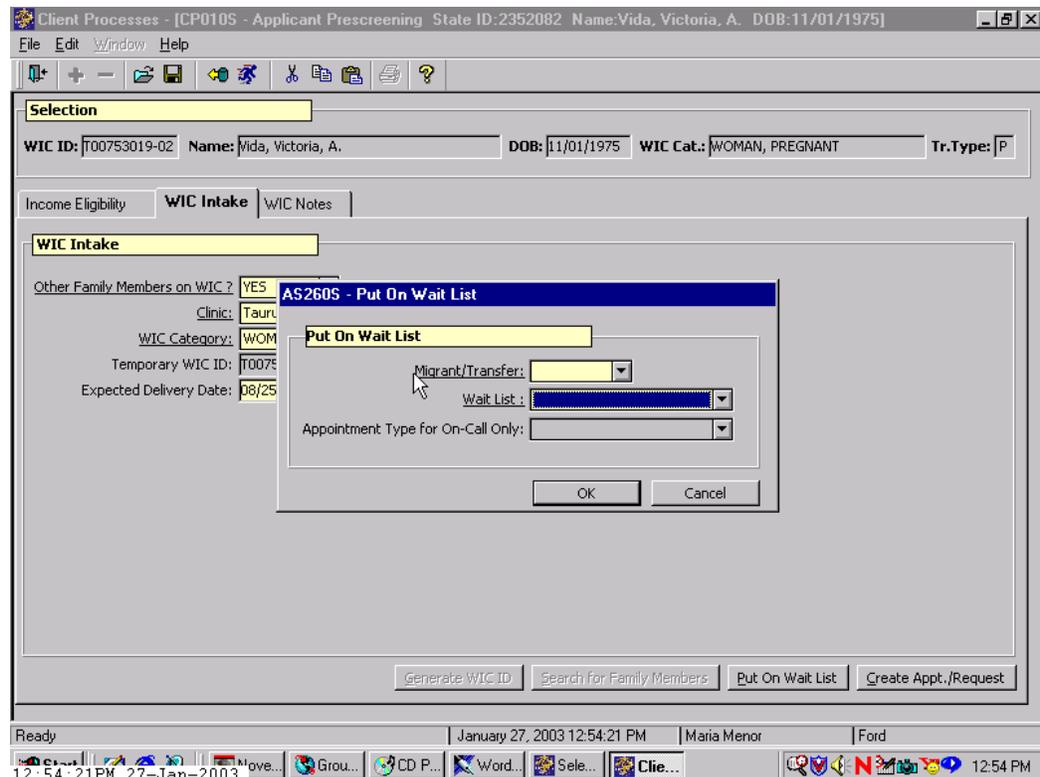


Figure 5: “Put on Wait List” Pop-Up

2. Select either “None,” “Migrant” or “Transfer” from the drop down list in the “Migrant/Transfer” field.
3. Tab to the “Wait List” field and select either the “Appointment Needed Wait List” or the “Priority Ineligible Wait List.”
4. If the “Appointment Needed Wait List” is selected, you must select the Appointment Type from the drop down list.
5. Click “OK” to close the pop-up and add the applicant to the Wait List.
 - Click “Cancel” to close the pop-up without adding the applicant to the Wait List.

♪ NOTE: You can place an applicant on a Wait List **or** create an appointment request, not both.

↳ **Practice Activity #4:**

The starting point for this lesson is:

Client Processes ⇒ Enrollment & Intake ⇒ Applicant Prescreening

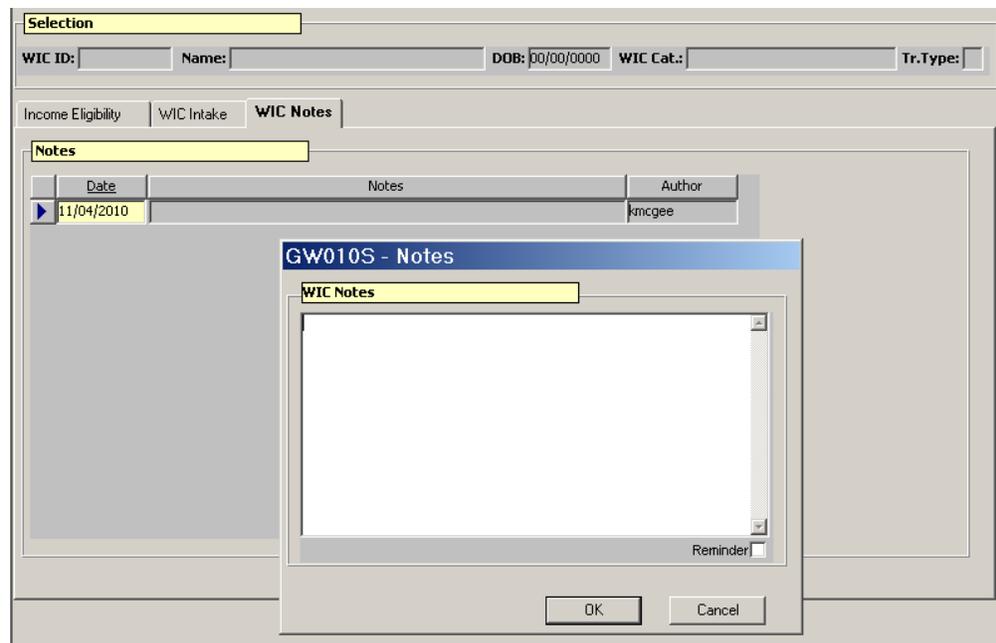
1. Click on the “WIC Intake” tab.
2. Click the “Put on Wait List” button.
3. Select the appropriate response for the “Migrant/Transfer” field.
4. Select the appropriate wait list in the “Wait List” field.
5. Click “OK” to close the pop-up.

WIC Notes

The starting point for this lesson is:

Client Processes ⇒ Enrollment & Intake ⇒ Applicant Prescreening ⇒ WIC Intake

1. **Click on the “WIC Notes” tab.**



The screenshot displays a software interface for WIC Notes. At the top, there is a 'Selection' dropdown menu. Below it are fields for 'WIC ID:', 'Name:', 'DOB: 00/00/0000', 'WIC Cat:', and 'Tr.Type:'. A tabbed interface shows 'Income Eligibility', 'WIC Intake', and 'WIC Notes' tabs, with 'WIC Notes' being the active tab. The main area contains a table with columns 'Date', 'Notes', and 'Author'. A row is visible with the date '11/04/2010' and author 'kmcgee'. A pop-up window titled 'GW010S - Notes' is open, featuring a 'WIC Notes' dropdown menu, a large text area for notes, a 'Reminder' checkbox, and 'OK' and 'Cancel' buttons at the bottom.

Figure 6: “WIC Notes” Screen

- The cursor will be in the “**Date**” field.
- This field defaults to today’s date but may be changed.

2. **Double click in the “Notes” field to display the “WIC Notes” pop-up.**
3. **Enter the information you want included in the note.**
 - The note is entered in free-form text.
 - Once a progress note has been entered, the screen is flagged with a “blue note” as a visual reminder to the user.
 - The screen also has a confidentiality feature that hides the text of the note until accessed if the information is marked “sensitive.”
 - To mark a note as sensitive, click the “**Reminder**” box in the lower right hand corner.
 - When a sensitive note has been recorded, the blue note turns red and the user must double click on the field to review the note.
4. **Save.**

↳ **Practice Activity #5:**

The starting point for this lesson is:

Client Processes ⇒ Enrollment & Intake ⇒ Applicant Prescreening

1. Click on the “WIC Notes” tab.
2. Double click in the “Notes” field. The “Notes” pop-up is open.
3. Enter a short free form note.
4. Click the “Reminder” box.
5. Click “OK” to close the pop-up.
6. Save this information.

✂ **Tips and Shortcuts:**

- Information may be saved at any time after a participant has been selected by using the “**Save**” icon on the toolbar.
- Once a WIC ID has been generated, information is saved automatically when you move from tab to tab.
- You will be prompted to save information before you leave a window if changes have not been saved manually or automatically.
- You will NOT be prompted to save information if you use the “**Clear Screen**” button and information has not been saved manually or automatically.
- You do not need to use the “**Applicant Prescreening**” process if you are going to enroll the participant immediately. Participants can be enrolled without using the “**Applicant Prescreening**” window.

- The “**Are you a migrant?**” and “**Contact type**” fields will help you determine the appropriate appointment to give to the participant based on processing standards. See Policy 605.

✓ Skill Check:

Use the information for the client in the Skill Check section of your  Activity Sheet for this practice.

A participant calls on the phone to see if she qualifies for WIC. Complete her prescreening. You will not need to schedule an appointment for her at this point in the training.

 Notes:

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Chapter 3: Client Processes

Section 1: Intake

Lesson: Producing a WIC ID Card

Objectives:

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

- produce and issue a WIC ID card.

Oregon Policies:

- ◆ 485 WIC Family Number and ID Card
- ◆ 540 Proxy System

Overview:

Producing and issuing a WIC ID card is a simple task and can be performed any time during a certification period after a WIC ID number has been generated.

Instruction:

Producing a WIC ID Card

The starting point for this lesson is:
Client Processes

1. **Select “Output” from the menu bar.**
2. **Select “Documents” and then select “WIC ID Card” from the drop down menu.**

The “**WIC ID Card**” screen is displayed.

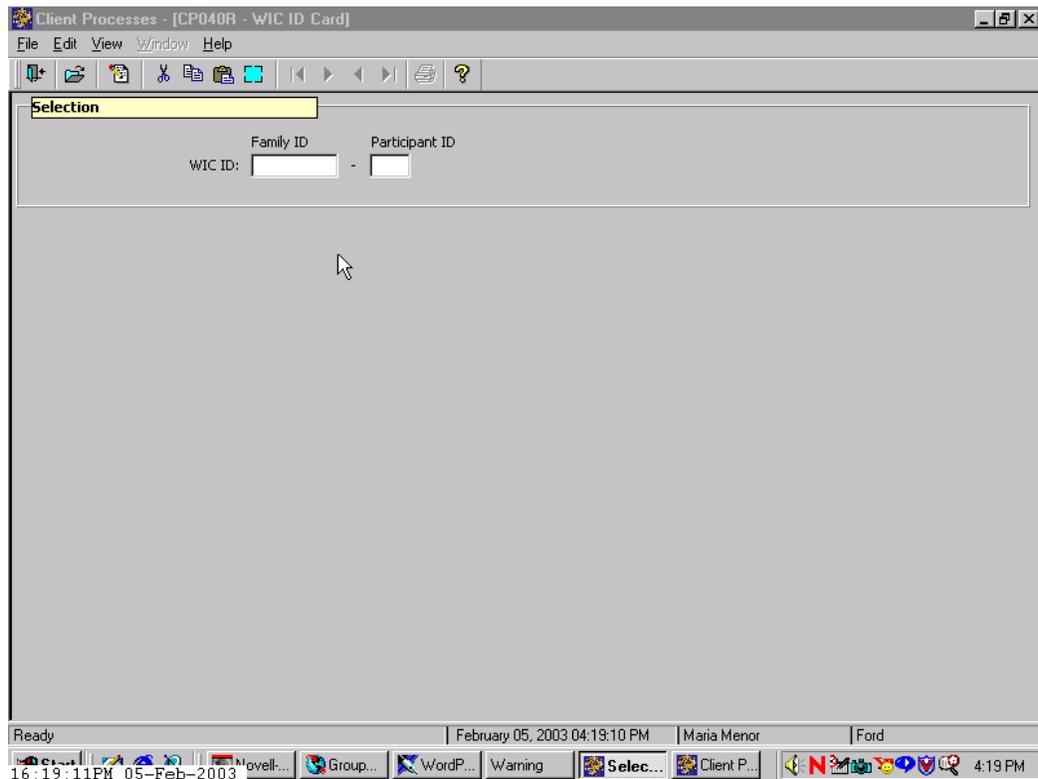


Figure 1: “WIC ID Card” Screen

3. **Enter the Family ID number in the “Family ID” field.**

TWIST will allow a Family ID number of up to eight digits in this field.

4. **Tab to the “Participant ID” field and enter the two digit participant ID number.**

🎵 **NOTE:** If you don't have the client's WIC ID handy you can also search “**Client Primary**” for information previously entered on the client and return to the “**WIC ID Card**” screen with the desired client.

5. **Click the “Print” icon.**
6. **Exit.**

✂ **Tips and Shortcuts:**

- Once you complete a certification you can fast path from the “Food Package” tab in Certification to the “WIC ID Card” screen.

↳ Practice Activities:

Starting from the “Client Processes” module, complete the following steps using your 📄 Activity Sheet.

1. Click on “Output” on the menu bar.
2. Select “Documents.”
3. Select “WIC ID Card.”
4. Enter your Family ID number.
5. Tab to the “Participant ID” field and enter your client ID.
6. Click the “Print” icon.
7. Exit.

✓ Skill Check:

Use your 📄 Activity Sheet to print another ID card.

Turn in both ID cards (from the Practice Activity and Skill Check) to the instructor.

📝 Notes:

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Chapter 3: Client Processes
Section 1: Intake
Lesson: Enrollment

Objectives:

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

- select the appropriate transaction types;
- complete the “Intake” function;
- identify and correctly fill in the “For Women Only” section;
- utilize the referrals button;
- document income information to meet voucher printing requirements; and
- change previously entered data.

Oregon Policies:

- ◆ 480 Voter Registration (Motor Voter)
- ◆ 590 Program Integrity: Participant Abuse
- ◆ 610 Required Proofs – Identity, Residency, Income
- ◆ 611 Income Eligibility: Determining Income Eligibility
- ◆ 612 Income Eligibility: Adjunct or Automatic Income Eligibility
- ◆ 613 Income Eligibility: What Counts as Income
- ◆ 614 Income Eligibility: Current Income Guidelines
- ◆ 615 Income Eligibility: Change in Income
- ◆ 616 Unavailable Proofs
- ◆ 635 Participant Notification: Eligibility and Rights & Responsibilities
- ◆ 640 Documentation Requirements for Certification in TWIST
- ◆ 655 Homeless Applicants
- ◆ 657 Migrant Workers: Definition

Overview:

This lesson covers how you will use TWIST to gather the information you need to check in a participant. You will learn how to enter or update the “Income Eligibility” and “WIC Intake” screens. In addition you will learn how these initial screens are the foundation for the certification process.

In Chapter 3, Lesson 100 *Applicant Prescreening* we reviewed the process for entering preliminary information on potential participants and creating a temporary WIC ID in order to create an appointment. In this lesson we will review what happens when a potential participant actually comes in for an appointment. At this point, the user will gather information from the applicant such as proof of residence, proof of income, referral information, etc.

Applicants do not have to be prescreened prior to the completion of “Enrollment.” However, any information entered in the “Applicant Prescreening” screen will be displayed in the “Enrollment” screen and may be modified. Additional information is also entered at this time to begin the certification process.

Instruction:

Updating or Entering Income Eligibility

As with “Applicant Prescreening” the “Enrollment” window is divided into two sections. The top part of the window is titled “Selection,” which is blank until you select a participant to enroll. If the participant has been prescreened the participant’s system-generated WIC ID will display. The “T” in the WIC ID will go away once the enrollment process for the participant is completed. The lower part of the “Enrollment” window is divided into three tabs and we will start with the first tab, “Income Eligibility.”

♪ NOTE: If the participant was prescreened, many fields will show information gathered during prescreening. You will only need to verify that the information is still current.

The starting point for this section is:

Client Processes ⇒ Enrollment and Intake ⇒ Enrollment

1. **Search “Client Primary” for information previously entered on the participant and return to the “Enrollment” screen with the desired participant (if found).**

Income Provider	Interval	Amount	Source	Proof of Income	Monthly	Annual
		0.00				
Totals:					0.00	0.00

Figure 1: “Income Eligibility” Screen

“Income Eligibility” Fields

2. **Select “Family” or “Client” for “Calculate Income for”.**

♪ NOTE: “Client” is only selected for foster children in state custody. They are considered a household of one. For all other situations use the default of “Family” when determining income.

- Changing from “**Client**” to “**Family**” will generate a system warning that all previous income information entered will be lost when existing family income is retrieved.

3. **On the “No. in Family” field, enter the number of family members.**
4. **On the “Unborn Counted” field, enter the number of babies being carried by a pregnant woman.**

♪ NOTE: TWIST adds the “**No. in Family**” and “**Unborn Counted**” to calculate total number in family when determining income.

5. **On the “Proof of Residency” field, select the type of proof provided.**
6. **On the “Proof of ID” field, select the type of proof provided.**

♪ NOTE: The “**New Income Date**” field is system-generated and automatically defaults to today’s date. Whenever changes are made to the screen the system will automatically update this field.

7. **On the “SNAP” field, select yes or no from the drop down list.**
8. **On the “Oregon Health Plan” field, select yes or no from the drop down list.**
9. **On the “TANF” field, select yes or no from the drop down list.**

♪ NOTE: Selecting “Yes” for “**SNAP**,” “**Oregon Health Plan**,” or “**TANF**”, indicates the participant reports participating in one of those programs. They may be adjunctively eligible.

10. **Check the “Elig Pending” check box if the participant did not bring proof of ID, residency or income.**

- If the “**Elig Pending**” box is checked, the participant will receive only one month of FIs, and the “**Elig Pending Date**” will be automatically populated with the current date.
 - If the required proof is not documented within 30 days and the check mark is not removed from the “**Elig Pending**” box TWIST will automatically terminate the participant.
 - If the terminated participant returns later with acceptable proof the participant may be re-activated for the certification period beginning the month the FIs were initially provided.
11. **On the “Income Provider” field, identify who in the family provides this income.**
 12. **On the “Interval” field, select the income interval from the drop down list.**
 13. **On the “Amount” field, enter the amount of income the participant receives for this interval.**
 - TWIST determines income eligibility automatically once the “Amount” field is complete.
 - If the amount of income entered exceeds the guidelines, a message is displayed stating, “*The client is not Income Eligible. Do you want to print an Ineligibility Notice?*”
 - You may select “Yes” to print the notice and close the pop-up or “No” to close the pop-up without printing the notice.
 - If the amount of income entered exceeds most annual incomes, a message is displayed stating “*\$xxx,xxx is an unusually high amount of annual income for any income source. Please verify the amount and interval for row #.*”
 - If the participant is income eligible, nothing will appear and you may continue.
 14. **On the “Source” field, select the source of the income from the drop down list.**
 15. **On the “Proof of Income” field, select the proof of income from the drop down list.**
 - Selecting a proof of income from one of the four programs that provide adjunctive eligibility (SNAP, Oregon Health Plan, TANF, or FDPIR) will allow the income amount to exceed the guidelines for the household.
 16. **Press Tab to create another line to enter additional income.**

- TWIST automatically calculates the monthly and annual salary amounts based on the information you entered for each line.
- Cumulative totals are also calculated for all lines and displayed in the “**Totals**” fields.
- If “**Hourly**” is selected as the interval TWIST calculates for a 40-hour workweek. If income is based on less than a 40 hours per week average, use “**Monthly**”.

17. **Click the “Save” icon to save the income information for the participant.**

♪ NOTE: The “**Clear Screen**” button in the lower right hand corner will remove all information on the screen.

♪ NOTE: The “**Averaging**” button opens the “**Income Averaging**” pop-up. Please refer to Chapter 3, Lesson 100 *Applicant Prescreening* for information on completing this pop-up.

You have completed income eligibility and are now ready to move on to the “**WIC Intake**” screen. TWIST will automatically save your work when you move to the next tab.

Entering and Updating WIC Intake

The starting point for this section is:

Client Processes ⇒ Enrollment and Intake ⇒ Enrollment

♪ NOTE: If the participant was prescreened, you will only need to verify that the information is still current; however, you will have other fields to complete as well.

“WIC Intake” Fields

Figure 2: “WIC Intake” Screen

1. **The “Check If No Changes” box can be checked if a participant is being recertified and no changes are needed.**
 - The box cannot be used for an initial certification.
2. **Select yes or no from the drop down list on the “Other Family Members on WIC?” field.**
3. **Select the appropriate clinic using the drop down arrow on the “Clinic” field.**
4. **Select the correct category using the drop down arrow on the “WIC Category” field.**

♪ NOTE: Click the “Question Mark” button to the right of the “Are You a Migrant?” field. A pop-up is displayed with the definitions for migrant and homeless.

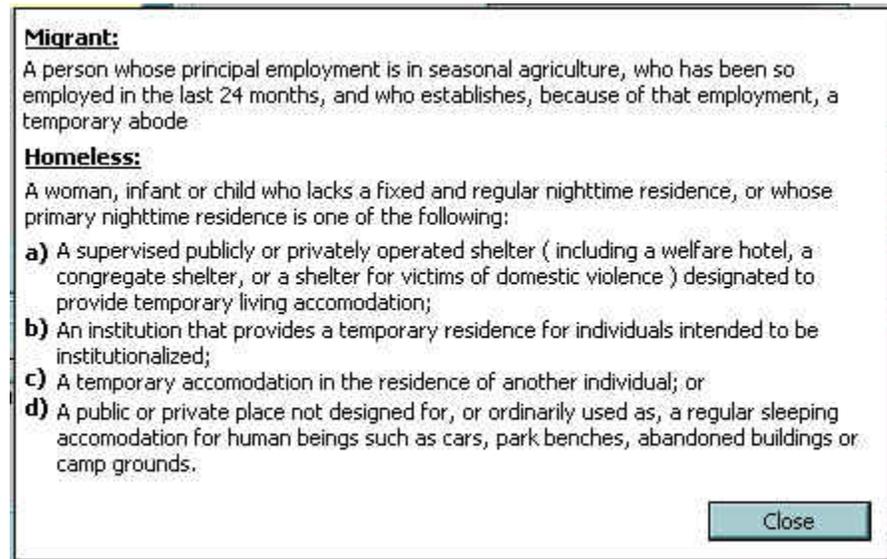


Figure 3: “Migrant & Homeless Definitions” Pop-Up

5. **Click the “Close” button to close the pop-up**
6. **Select the appropriate answer using the drop down arrow on the “Are You a Migrant?” field.**
7. **Select the appropriate answer using the drop down arrow on the “Are You Homeless?” field.**

♪ NOTE: Selecting “yes” in either of these fields will generate the appropriate nutrition risk for this participant and also will allow the participant to choose the homeless food package.

8. **The “May We Contact You By Mail?” field displays information gathered on the “Client Master” screen.**
9. **The “May We Contact You By Phone?” field displays information gathered on the “Client Master” screen.**
10. **Select yes or no from the drop down list on the “Auto Scheduler, OK?” field.**
 - This field defaults to “**Yes**”.
 - Selecting “**No**” prevents Auto Scheduler from automatically scheduling the participant.

♪ NOTE: If your agency is not using the Auto Scheduler then you should always select “No” for this field.

♪ NOTE: TWIST will automatically fill the “**Re-Activate?**” box if the “**Re-activation**” transaction type is selected. You will learn more about transaction types in Chapter 3, Lesson 800 *Change Transaction Types*.

♪ NOTE: The “**Waiting List**” field is display only and will be populated after you complete the “**Put on Wait List**” pop-up as necessary. The waiting list function is covered in a separate lesson.

11. **Select the appropriate answer from the drop down list for the following information in the “For Women Only” Box if the participant is a woman.**

11.1 Voter Registration Offered

- “**Yes**” = Voter Registration was offered to participant (regardless of whether they registered, were previously registered, or elected not to register).
- “**No**” = Voter Registration was not offered (forgot to do it).
- “**Not applicable**” = Participant not eligible to vote (known non-citizen, woman under 18 years).

11.2 Marital Status

11.3 Education

11.4 **LMP** or **EDD** field if the participant is a pregnant woman.

♪ NOTE: If you enter the LMP, TWIST will calculate the EDD for you, or *vice versa*.

11.5 Enter the appropriate date in the “**ADD**” (Actual Delivery Date) field if the participant is a Breastfeeding or Postpartum woman.

- Certification End Date will be calculated from these fields.

♪ NOTE: LMP or EDD will be reflected in the Medical Data box of the “**Woman Certification**” screen where this information is mandatory.

12. **Enter the last two digits of the mother’s ID number in the second box of the “Mother’s WIC ID” field.**

- The field will be enabled once you save the participant’s info and then only if the participant is an infant or child.
- The system will complete the first box with the mother’s “Family ID” number.

- Entering the mother's ID number will establish a link between infant or child and mother.
- "Mother's DOB" field will be populated by the system once the mother's ID number has been entered.

"WIC Intake" Buttons

13. **Click the "Generate WIC ID" button, if it is enabled, to generate a WIC ID number.**

- If the participant has been prescreened a temporary ID number will have been generated in the "Applicant Prescreening" function.
- TWIST will remove the "T" from a temporary ID number generated in the "Applicant Prescreening" function once the "Enrollment" screen is saved.
- The "WIC ID" field will display the current WIC ID number.
- The "Old WIC ID" field will display the old WIC ID if applicable.

♪ NOTE: The "**Search for Family Members**" button is enabled only if other family members are on WIC. Information on the "Search for Family Members" button can be found in Chapter 3, Lesson 100 *Applicant Prescreening*.

- When a participant has a different address and/or phone number than the family it has been linked to, a message will automatically pop-up requesting which address or phone profile to use.

Addr Type	Str #	Pre Dir	Str Name	Str Type	Post Dir	Apt	City	State	Zip	+ 4	May we contact you by mail?
FAMILY #946445	900389700	123	HOME				TUALATIN	OR	97062		Yes
INCOME, PREGNANT	1000389700										Yes

Figure 4: “Cascade Family Addresses” Pop-Up

- To change the participant’s address to match the family address, select the **“Family #”** button in the **“Select Address to User for Family”** section.
- To keep the participant’s address different from the other family members, select the **“Client”** button.
- The **“Address Details”** section lists the Client and Family # addresses. Click **“OK”** to close the pop-up.

Phone Type	Phone Number	Ext	Phone Option	ANSWR Preferences	May we contact you by phone?	
				Voice	Text	
FAMILY #946445						
Cell Phone	(503) 555-5555		Both Voice & Text	Yes	Yes	Yes
INCOME, PREGNANT						
No Phone				No	No	Yes

Figure 5: “Cascade Family Phones” Pop-Up

- To change the participant’s phone profile to match the family phone profile, select the “**Family #**” button in the “**Select Phone Numbers to use for Family**” section.
- To keep the participant’s phone profile different from the other family members, select the “**Client**” button.
- The “**Client Phone Number Details**” section lists the Client and Family # phone profiles. Click “**OK**” to close the pop-up.

CP285 - Cascade Family E-mail

Select Email to use for Family

FAMILY #946445

CLIENT

Client Email Details

Client E-mail	ANSWR E-mail Preference Indicator
FAMILY #946445	No
INCOME, PREGNANT	No

OK Cancel

Figure 6: “Cascade Family E-mail” Pop-Up

- To change the participant’s email address to match the family email address, select the “**Family #**” button in the “**Select Email to use for Family**” section.
 - To keep the participant’s email address different from the other family members, select the “**Client**” button.
 - The “**Client Email Details**” section lists the Client and Family # email addresses. Click “**OK**” to close the pop-up.
 -
14. Click the “**WIC ID History**” button to open the pop-up.

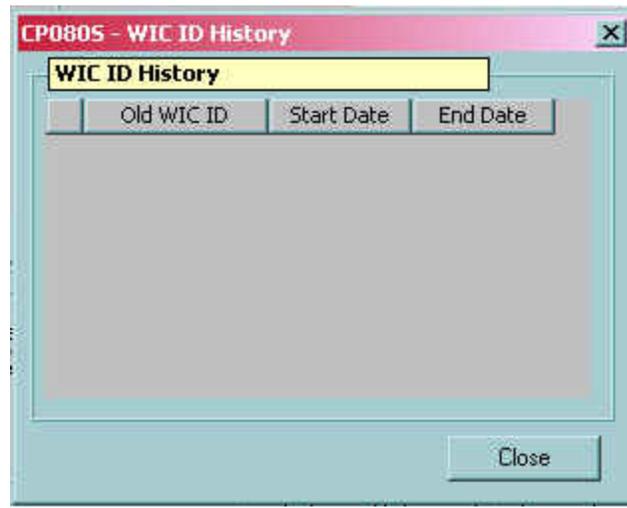


Figure 7: "WIC ID History" Pop-Up

- All old ID number information will be displayed.

♪ NOTE: See Chapter 3, Lesson 808 *Foster Families and Custody Changes* for information on changing a participant's WIC ID number.

15. **Close the pop-up.**
16. **Click the "Referrals" button to open the "Referrals from WIC" pop-up.**

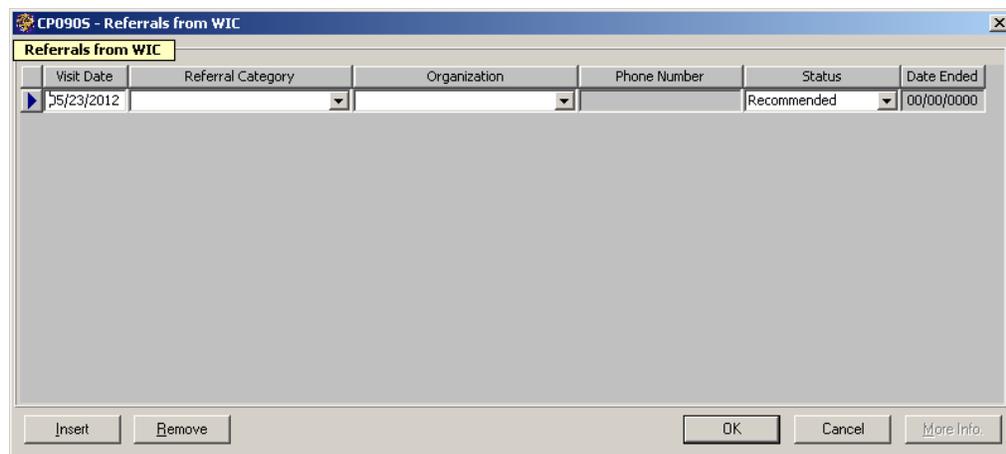


Figure 8: "Referrals from WIC" Pop-Up

- This pop-up is used to document referrals offered or provided to the participant.
- **"Referral Category"** is used to indicate the type of referral being made.

- **“Organization”** is used to indicate the name of the referral organization.
 - **“Phone Number”** displays contact information for the referral organization.
 - **“Status”** indicates the referral status.
 - The **“Insert”** button in the lower left hand corner can be used to create additional rows.
 - The **“Remove”** button can be used to remove a row.
17. **Click “OK” to close the pop-up and save your changes.**
- Clicking **“Cancel”** will close the pop-up without saving the information.
18. **Click the “Medical Providers” button to open the “Medical Providers” pop-up.**



Figure 9: “Medical Providers” Pop-Up

- **“Doctor’s Name”** is used to enter the medical provider’s name.
 - **“Phone”** is used to enter medical provider’s phone.
 - The **“Insert”** button in the lower left hand corner is used to enter additional doctor’s information.
 - The **“Remove”** button is used to remove a row.
19. **Click “OK” to close the pop-up and save your changes.**

- The “**Medical Provider Info Present**” box will be checked once information has been entered in the “**Medical Providers**” pop-up.
- Clicking “**Cancel**” will close the pop-up without saving the information.

↳ **Practice Activity #1:**

The starting point for this section is:

Client Processes ⇒ Enrollment and Intake ⇒ Enrollment

1. Click on the “WIC Intake” tab to access the “WIC Intake” screen.
2. Review the information on the screen and verify/change the following information:
 - “Other Family on WIC?” – **No**
 - “Are you a Migrant?” – **No**
 - “Are you Homeless?” – **No**
 - “Auto Scheduler, OK” – **Yes**
 - “Voter Registration Offered” – **Yes**
 - “Marital Status” – **Unmarried**
 - “Education” – **High School Diploma**
 - “EDD” – **3 months from today’s date.**
3. Save the updated information.
4. Open the “Referrals from WIC” pop-up and enter **Health Department Programs** in the “Referral Category.”
5. Click “OK” to close the pop-up.
6. Open the “Medical Providers” pop-up and enter **your doctor’s name and phone number.**
7. Click “OK” to close the pop-up.

Reviewing “Certification Dates” Section

Certification Dates						
Start Date	End Date	Transfer	Term Date	Term Type	Date of Term Notification	
04/02/2010	12/31/2010		00/00/0000	Client	00/00/0000	

Figure 10: “Certification Dates” Pop-Up

♪ NOTE: TWIST will allow the “**Start Date**” and the “**End Date**” to be modified within 30 days of the original entries.

- The “Start Date” for new enrollments will be system generated as today’s date.

- The system will calculate and display the “End Date” based on the start date, the category, the EDD, or the ADD.

1. Click the “Category History” button to open the “Category History” pop-up.

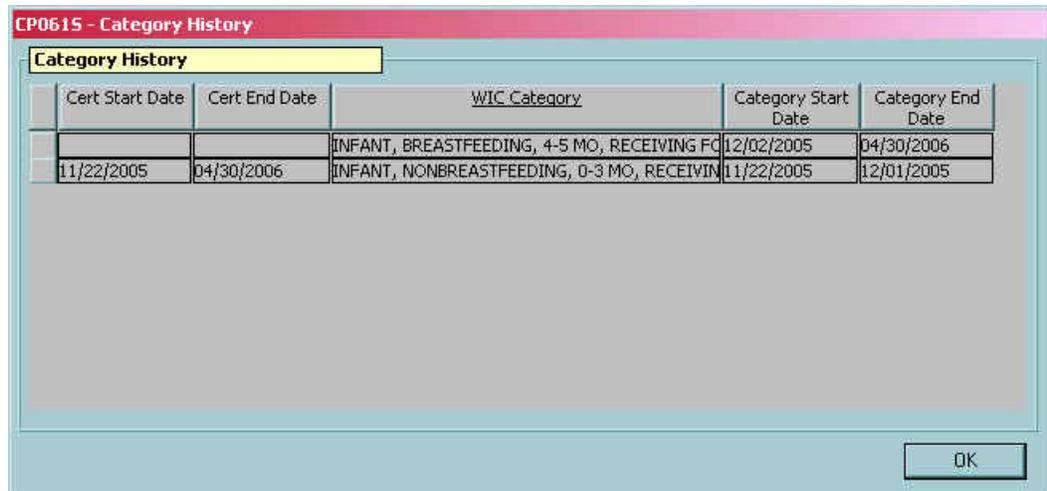


Figure 11: “Category History” Pop-Up

- This pop-up will display the “WIC Category” entered above as well as any other WIC categories the participant had been previously assigned, if applicable.
2. Click “OK” to close the pop-up.
 3. View the next four fields which are system-generated.
 - If the participant has been transferred the “Transfer” field displays that information.
 - If the participant has been terminated the “Term Date” field displays the date the participant was terminated.
 - The “Term Type” field indicates whether the participant or entire family was terminated.
 - The “Date of Term Notification” will be automatically filled by TWIST once a Termination notice is printed for a participant.
 4. Click the “Termination / Ineligibility Reasons” button to open the “Ineligibility / Termination Reasons” pop-up.

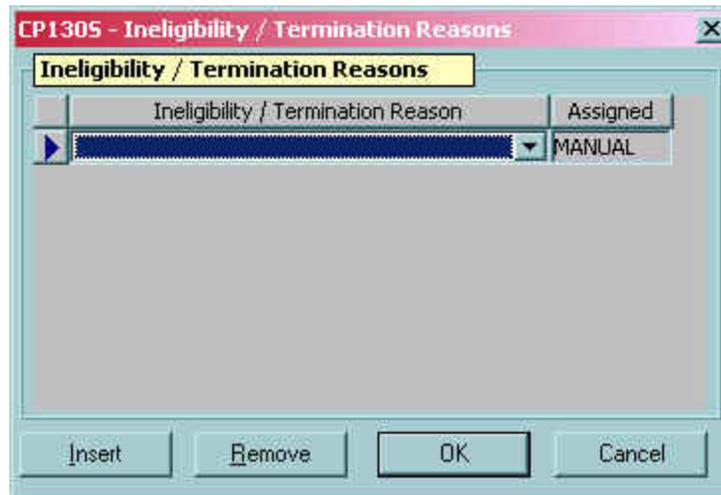


Figure 12: “Ineligibility / Termination Reasons” Pop-Up

- This screen displays system-generated reasons for ineligibility or termination.
- Click the **“Insert”** button in the lower left hand corner to enter additional reasons.

♪ NOTE: Learn more about termination and ineligibility in Chapter 3, Lesson 805, Terminations/Ineligibles.

5. **Click “OK” to close the pop-up and save your changes.**
 - Clicking **“Cancel”** will close the pop-up without saving the information.
6. **Click the “Change Transaction Type” button to open the “Select Transaction Type” pop-up.**

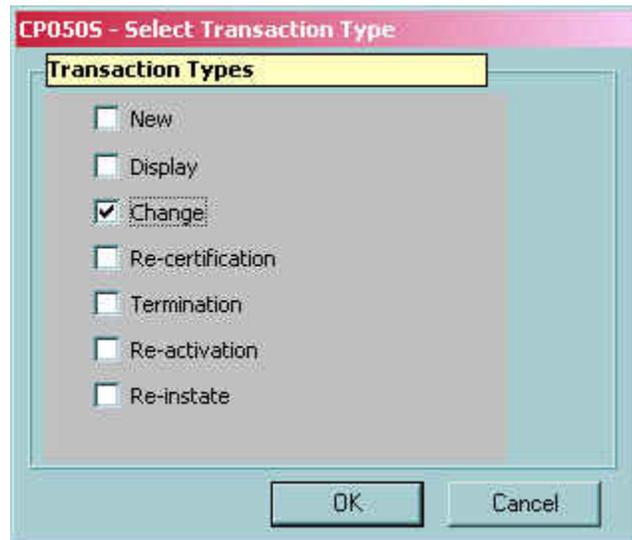


Figure 13: “Select Transaction Type” Pop-Up

- 6.1 **New** – this is automatically generated for a participant who does not have a WIC record.
 - 6.2 **Display** – this type will be used if the user wants to “view” a record without making changes.
 - 6.3 **Change** – this type is used when any change is needed.
 - 6.4 **Recertification** – this is auto-generated if a participant’s recertification is due. However, it can be selected manually. See Chapter 3, Lesson 700, Recertification.
 - 6.5 **Reinstate** – this type is used when the participant is terminated and more than 30 days past the certification end date. See Chapter 3, Lesson 801, Reactivate and Reinstate.
 - 6.6 **Termination** – this type is chosen if a user needs to manually terminate a participant.
 - 6.7 **Re-activation** – this type is used to re-activate a participant who was terminated but is still within their certification period. See Chapter 3, Lesson 801, Reactivate and Reinstate.
7. **Click “OK” to save the transaction selection and close the pop-up.**
 - Clicking “**Cancel**” will close the pop-up without saving your selection.

8. Click the “Client Disqualification” button to open the “Client Disqualification” pop-up.

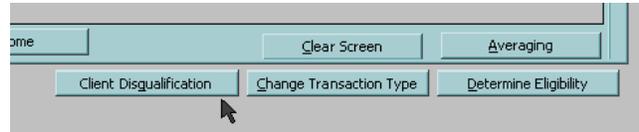


Figure 14: “Client Disqualification” Button

- The “Client Disqualification” button is present on all enrollment screens.
- This screen displays State-entered disqualification data and proxy-in-lieu-of-disqualification information. This pop-up is “display only” for Local Agency users. Please see Policy 590 *Participant Violations* for more information.

♪ NOTE: The fields will contain data only if the participant is or was in a period of disqualification.

♪ NOTE: If the participant is in a state of disqualification, the system will generate an error if the user attempts to change the transaction type.

- If a participant is currently disqualified and has a proxy-in-lieu-of-disqualification (someone obtaining services for the participant), the “Assigned Proxy” field will turn red and be populated with the proxy’s name.

Figure 15: “Assigned Proxy” Field

“Disqualification Data” Fields

- These fields contain information about current and past disqualifications.

Disqualification Data							
Start Date	End Date	Active	Case Id	Notes	First Name	MI	Last Name
03/08/2005	09/08/2005	Yes			Desi		Proxy

Figure 16: “Client Disqualification” Pop-Up (Disqualification Data)

- 8.1 **Start Date** – beginning of the disqualification period.
- 8.2 **End Date** – end of the disqualification period.
- 8.3 **Active** – if “Yes” a disqualification is in effect and participant is not able to receive services; if “No” disqualification could be going through an appeal, payment plan, or exception and participant is able to receive services.
- 8.4 **Case Id** – investigation file number.
- 8.5 **Notes** – any notes relevant to the disqualification.

“Proxy Info” Fields

Proxy Info						
First Name	MI	Last Name	Address	City	State	Zip Code
Desi	Proxy		123 W 3rd St	Oregon City	OR	97333

Figure 17: “Client Disqualification” Pop-Up (Proxy Info)

- These fields contain name and address information for the proxy-in-lieu-of-disqualification.

9. Click “OK” to close the “Client Disqualification” pop-up.

🎵 **NOTE:** The “**Determine Eligibility**” button is present on all enrollment and certification screens but is not enabled until a certification is complete. For more information please refer to Chapter 3 Lesson 200 *Certification Overview*.

10. The “Assign Peer Counselor” button appears at the bottom of all enrollment screens but is only enabled for women participants. After a peer counselor has been assigned, “PC Status: Active” will display on the title bar following the participant’s name and date of birth. When a woman is no longer participating in the peer counselor program, the status will be “Inactive”. For more information please refer to Chapter 3 Lesson 103 *Breastfeeding Peer Counselor Assignment*.

The screenshot shows a software window titled "Client Processes - [CP0605 - Enrollment State ID:2582516 Name: QUINONES, BRENDA DOB:05/27/1986 PC Status: ACTIVE]". The main area is a form with several sections:

- Selection:** WIC ID: 00797515-01, Name: BRENDA, WIC Cat.: WOMAN, NON-BREASTFEEDING, Tr. Type: C
- WIC Intake:**
 - Check if No Changes:
 - Other Family Members On WIC:
 - Clinic: MEDFORD SPANISH
 - WIC Category: WOMAN, NON-BREASTFEEDING
 - Are You a Minor?: NO
 - Are You Homeless?: NO
 - May We Contact You By Mail?: YES
 - May We Contact You By Phone?: YES
 - Auto Scheduler, OK?: YES
 - Re-Activate?:
 - WIC ID: 00797515-01
 - Old WIC ID: []
 - Waiting List: []
 - For Women Only:
 - Voter Registration Offered: YES
 - Marital Status: SINGLE
 - Education: HIGH SCHOOL STUDENT
 - LMP: 07/24/2010 or EDD: 04/30/2011 ADO: 04/20/2011
 - Mother's WIC ID: []
 - Mother's DOB: 00/00/0000
 - DO Proxy: []
 - Guardian Type: []
 - Medical Provider Info Present:
- Certification Dates:**

Start Date	End Date	Transfer	Term Date	Term Type	Date of Term Notification
06/01/2011	01/31/2011		00/00/0000	Client	00/00/0000
09/13/2010	05/31/2011		00/00/0000	Client	00/00/0000
11/04/2004	02/28/2005		02/28/2005	Client	00/00/0000

At the bottom of the window, there are buttons for "Generate WIC ID", "Search for Family Members", "WIC ID History", "Referrals", "Medical Providers", and "Put On Wait List". Below the form is a row of buttons: "Immunizations Status", "Assign F/N Group", "Assign Peer Counselor", "Client Disqualification", "Change Transaction Type", and "Determine Eligibility". The status bar at the bottom shows "Ready", "October 25, 2011 12:55 PM", "Julie Aalbers", and "Jackson OHD".

Figure 18: “WIC Intake” PC Status in Title Bar

Entering a WIC Note

The next tab is “WIC Notes.” Please refer to Chapter 3, Lesson 100 *Applicant Prescreening* for information about this tab. Entering information in this tab is optional.

↪ Practice Activity #2:

The starting point for this section is:

Client Processes ⇒ Enrollment and Intake ⇒ Enrollment

1. Click on the “WIC Notes” tab to access the “WIC Notes” screen.
2. Double click in the “Notes” field and enter a short note.
3. Click the “Reminder” box.
4. Click “OK” to close the pop-up.
5. Save your work and exit.

Skill Check:

Your participant comes back for her appointment. Access her previously entered information and complete her “WIC Enrollment” screens with the following information.

She is not a migrant or homeless.

She was referred to WIC by the Oregon Food Bank.

Her doctor is Samuel Blue, 503-993-2201.

She has a high school diploma.

She does not want to register to vote.

She does not want to be Auto Scheduled for an appointment.

Tips and Shortcuts:

- Tabs can be completed in any order.
- Once you complete a tab you may save the information manually or TWIST automatically saves the information once you move to the next tab. A blue check mark appears on each tab once the information has been entered and manually or automatically saved.

Notes

Chapter 3: Participant Processes
Section 1: Intake
Lesson: Breastfeeding Peer Counselor Assignment

Objectives:

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

- use the “Assign Peer Counselor” function;
- modify information in the “Assign Peer Counselor” screen;
- assign a peer counselor to a participant that has had a peer counselor with a previous baby;
- inactivate a participant in the breastfeeding peer counseling program; and,
- print peer counseling reports.

Oregon Policies:

- ◆ 718 Breastfeeding Peer Counseling: Job Parameters, Protocol and Scope of Practice

Overview:

This lesson covers how you will use TWIST to assign a Breastfeeding Peer Counselor to a WIC participant who is pregnant and has indicated that she would like to have a Breastfeeding Peer Counselor. You will learn how to enter and update data in the “Assign Peer Counselor” screen. You will learn the impact this screen and fields have on the reports that Breastfeeding Peer Counselors, Coordinators and State WIC Staff use, and you will learn how to print a Peer Counseling report.

♪ NOTE: Once a participant has been assigned to a peer counselor in TWIST, a schedule of calls is available in the report “PC Schedule for Participant Contacts”. See the last section of this lesson on running Peer Counseling Reports.

Instruction:

Entering or Updating the Peer Counselor Assignment

The starting point for this section is:

Participant Processes ⇒ Enrollment and Intake ⇒ Enrollment

♪ NOTE: The participant must be fully certified in TWIST before assigning a peer counselor.

1. **Open the “Enrollment” screen and retrieve the participant to be assigned a peer counselor.**

The screenshot shows the 'Enrollment' screen with the following details:

- Selection:** WIC ID: 01014327-01, Name: Tester, Peer Counselor, DOB: 06/01/1969, WIC Cat.: WOMAN, PREGNANT, Tr. Type: E
- WIC Intake:**
 - Check if No Changes:
 - Other Family Members On WIC?: NO
 - Clinic: BEND
 - WIC Category: WOMAN, PREGNANT
 - Are You a Migrant?: NO
 - Are You Homeless?: NO
 - May We Contact You By Phone?: YES
 - May We Contact You By Mail?: YES
 - Auto Scheduler, OK?: YES
 - Re-Activate?:
 - WIC ID: 01014327-01
 - Old WIC ID: [blank]
 - Waiting List: [blank]
 - For Women Only: [blank]
 - Voter Registration Offered: NO
 - Marital Status: DOMESTIC PARTNER
 - Education: ASSOCIATES DEGREE
 - LMP: 03/07/2010 or EDD: 12/12/2010 ADD: 00/00/0000
 - Mother's WIC ID: [blank]
 - Mother's DOB: 00/00/0000
 - DQ Proxy: [blank]
 - Medical Provider Info Present:
- Certification Dates:**

Start Date	End Date	Transfer	Term Date	Term Type	Date of Term Notification
09/08/2010	01/31/2011		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, Immunizations Due, Assign FM Group, **Assign Peer Counselor** (highlighted), Client Disqualification, Change Transaction Type, Determine Eligibility.

Figure 1: “Enrollment” Screen

2. **Click on the “Assign Peer Counselor” button at the bottom of the screen to open the “Assign Peer Counselor” pop-up.**

The screenshot shows the 'Assign Peer Counselor' pop-up window with the following details:

- Peer Counseling Table:**

Start Date	End Date	PC Level	Peer Counselor	Status	Inactive Date	Inactive Reason
08/09/2011	06/30/2012		Capitol Counselor	ACTIVE	00/00/0000	
- Buttons:** Insert, Remove, OK, Cancel.

Figure 2: “Assign Peer Counselor” Pop-Up showing Start and End Dates auto-filled

♪ NOTE: The Start Date will automatically fill with today's date. The End Date will automatically fill a date six months from the EDD rounded to the end of the month. Once the ADD has been entered in the Intake Screen, the End Date will adjust to six months from ADD.

♪ NOTE: Peer counselor staff must first be added to the "Staff Information" table in the "Operations and Management" module, which requires the Breastfeeding Peer Counselor Coordinator to have the correct security role.

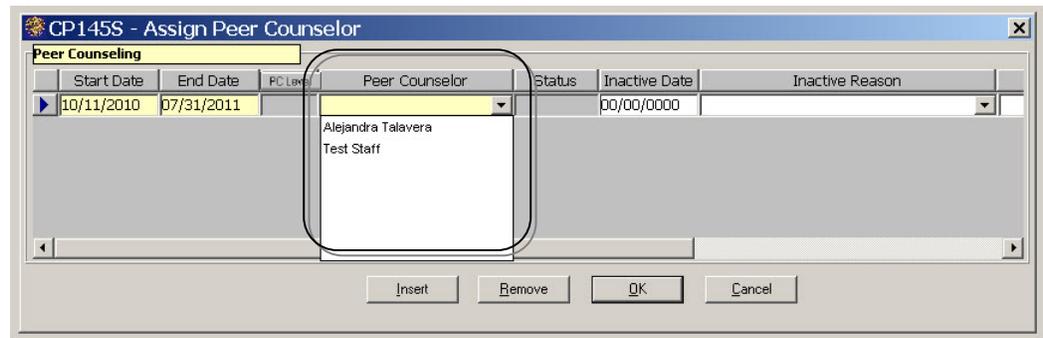


Figure 3: Peer Counselor" drop down displaying peer counselors

3. **Click on the name of the counselor.**

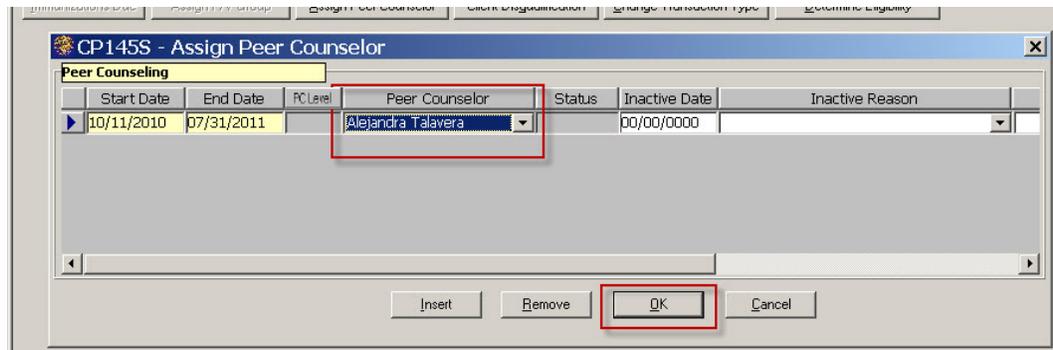


Figure 4: "Peer Counselor" field with counselor selected and OK button

4. **Click on the "OK" button to close the "Assign Peer Counselor" Screen.**

♪ NOTE: TWIST automatically adds "ACTIVE" to the Status field after OK is clicked and the Assign Peer Counselor screen is closed. When a woman is no longer participating in the peer counselor program, the status will be "INACTIVE".

♪ NOTE: To change a peer counselor, repeat the process for accessing the Assign Peer Counselor screen and select a different peer counselor.

5. Select "PC Level."

- Agencies with Breastfeeding Peer Counselor programs may assign one of two PC levels, "PC" or "PC1". The levels are used to organize the Peer Counseling program participants into the two groupings.
- TWIST will auto fill "PC" when you assign a woman to a peer counselor. "PC" identifies the routine service - enrolling pregnant women into the prenatal series.
- "PC1" identifies the non-routine service - enrolling pregnant women and following them individually during office visits, one to one, instead of in a group.

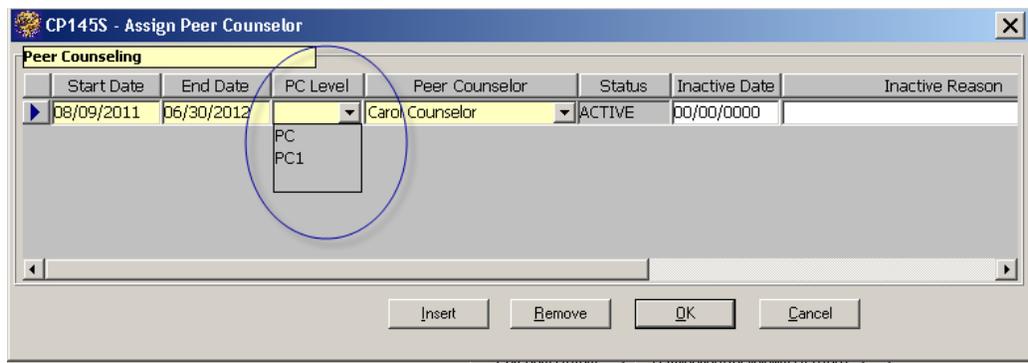


Figure 5: PC Level drop down.

- Once the PC level is assigned on a participant's "Assign Peer Counselor" pop-up, it will display on the blue title banner for the client at the top of the screen. The blue banner will display "PC Level: PC," "PC Level: PC1" or "PC Status: Inactive."

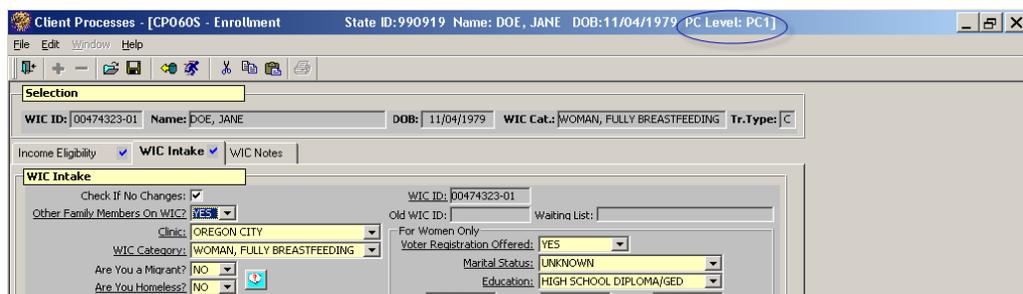


Figure 6: PC Level Status display in blue banner.

Assigning a Peer Counselor When the Participant has had a Peer Counselor With a Previous Baby

1. To add the peer counselor assignment for a new pregnancy, click the “Insert” button in the “Assign Peer Counselor” pop-up to add a new row.

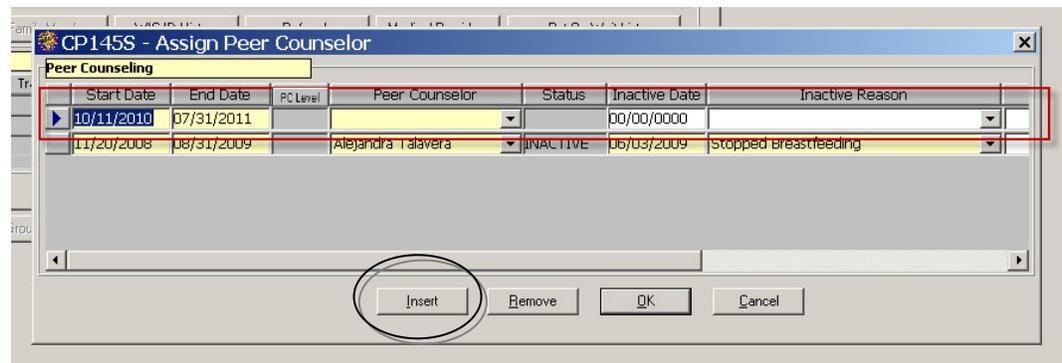


Figure 7: New row inserted when participant was assigned a Breastfeeding Peer Counselor with a previous baby.

2. In the new row, follow the steps for assigning a peer counselor described in the previous section.

Inactivating a Peer Counseling Participant

The “Assign Peer Counselor” screen is designed to update the reports that the Breastfeeding Peer Counseling Coordinator uses to manage the program, including when and why a participant stops participating.

The starting point for this section is:

Participant Processes ⇒ Enrollment and Intake ⇒ Enrollment ⇒ Assign Peer Counselor

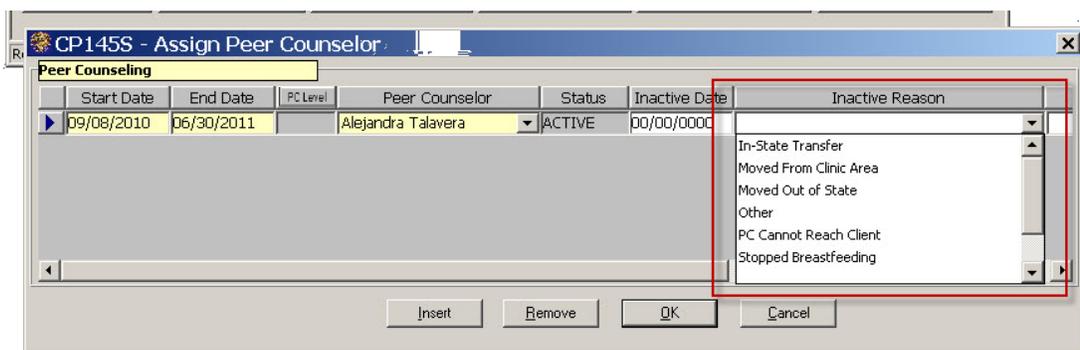


Figure 8: “Inactive Reason” drop-down list

1. **Select an Inactive Reason**

♪ NOTE: The “Status” and “Inactive Date” will auto-fill once a reason has been selected. This date can be changed manually.

Select “Other” for inactive reasons not in the drop down list, including:

- Miscarriages
- Victims of domestic violence that have moved for safety reasons
- Deceased mother or baby
- Incarceration of mother

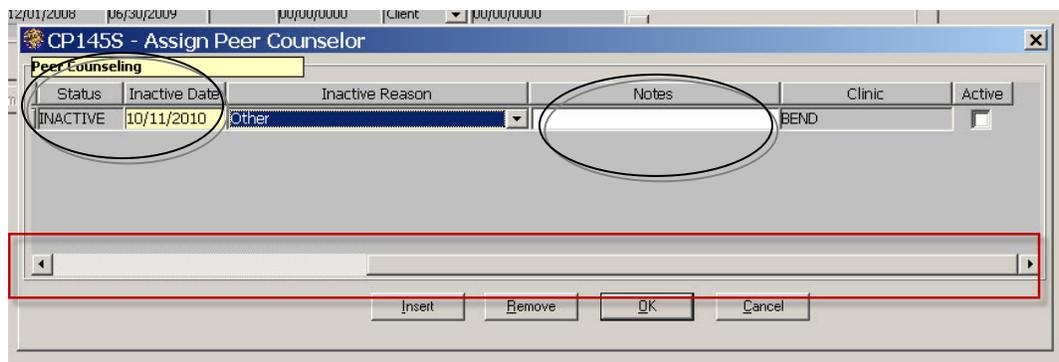


Figure 9: “Notes” field

2. **Scroll right to the “Notes” field if needed.**
3. **Click the OK button to close and update the record.**

Peer Counseling Reports

The starting point for this section is:

Client Processes ⇒ Reports ⇒ Nutrition Education ⇒ Peer Counseling

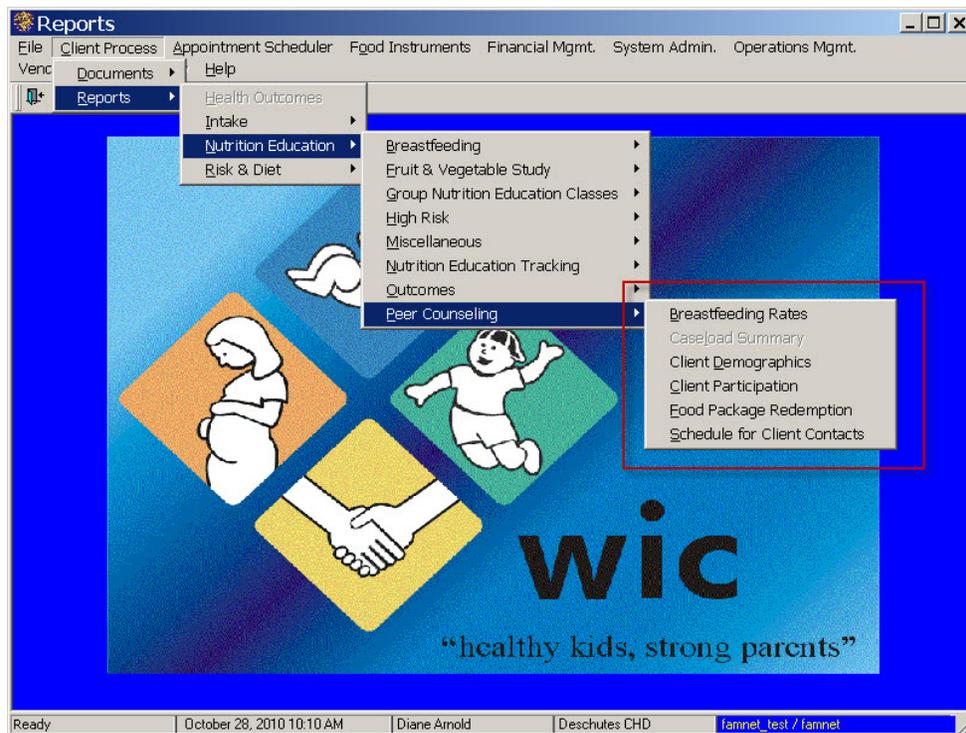


Figure 10: File Menu with Breastfeeding Peer Counseling Reports.

The reports available in the Peer Counseling File Menu are specific to Breastfeeding Peer Counseling participation and include:

- Breastfeeding Rates
- Caseload Summary
- Client Demographics
- Client Participation
- Food Package Redemption
- Schedule for Client Contacts

The Start and End Dates and Inactive Dates in the Assign Peer Counselor pop-up affect the data in all of these reports.

See Chapter 7 for information about printing reports. All TWIST reports provide a blank screen to enter selection criteria for the report you want to run.

It will also display on these reports: Peer Counseling Client Participation and Breastfeeding Tracking Function Call Back.

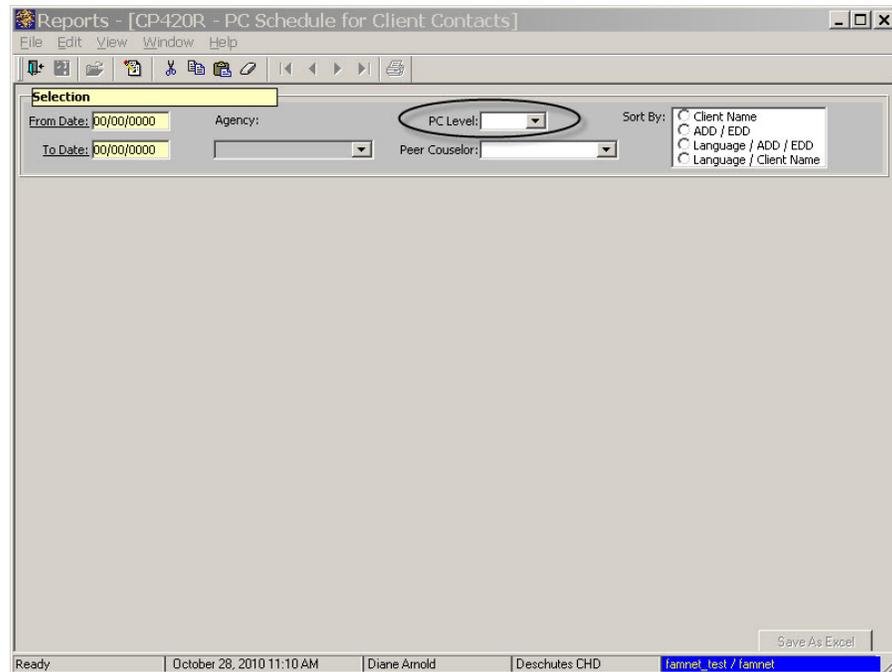


Figure 11: File Report Selection Criteria Screen for “PC Schedule for Participant Contacts” Report.

♪ NOTE: The Breastfeeding Peer Counseling Coordinator will print “PC Schedule for Participant Contacts” reports and give them to the peer counselors after participants are assigned in TWIST.

➔ **Practice Activities:**

Run a “PC Schedule for Client Contacts” for a specific peer counselor for this month.

1. Double click the “Reports” icon on “Select Modules” screen.
2. Select “Client Processes”.
3. Select “Reports”.
4. Select “Schedule for Client Contacts”.
5. Select a peer counselor.
6. Enter a “From” date of the first of this month and a “To” date of the last day of this month.
7. Click the “Run” icon.
8. Do not print report.