

# Oregon Clerical TWIST Training Agenda

## Day One

### **8:00 Welcome and Introductions**

### **8:15 Introduction to WIC**

*Activity 1 – Intro to WIC Module Objectives Review*

### **8:45 Introduction to TWIST and Security**

*Activity 2 – Review Lessons: TWIST Screen and Data Entry (1-200), Fast Paths (1-201), Help (1-400)*

- ❑ Job Aid – Keyboard Shortcuts and TWIST Icons

### **9:00 Applicant Prescreening**

*Activity 3 – Review Lessons: Client Search and Client Demographics (2-100), Applicant Prescreening (3-100)*

- ❑ Activity Sheet 3 – Applicant Prescreening
- ❑ Client Search and Client Demographics Lesson (2-100)
- ❑ Applicant Prescreening Lesson (3-100)
- ❑ Job Aid – Income Guidelines
- ❑ Handout – TWIST to FamilyNet Client Demographic Navigation

### **9:45 Break**

### **10:00 New Enrollment of a Pregnant Woman**

*Activity 4 – Review Enrollment Lesson (3-102)*

- ❑ Activity Sheet 4 – New Enrollment of a Pregnant Woman
- ❑ Enrollment Lesson (3-102)
- ❑ Handout – Participant Signature Form
- ❑ Handout – My Rights and Responsibilities

### **10:30 Transaction Types – Recertification and Enrolling an Infant**

*Activity 5 – Review Lessons: Recertification (3-700), Transaction Types (3-800),*

- ❑ Activity Sheet 5 – Recertification and Enrolling an Infant
- ❑ Recertification Lesson (3-700)
- ❑ Transaction Types Lesson (3-800)
- ❑ Job Aid – Transaction Types
- ❑ Job Aid – Choosing the Appropriate Transaction Types
- ❑ Job Aid – Using the Immunization Forecast

### **11:00 Reinstate and Reactivate**

*Activity 6 – Review Reactivate and Reinstate Lesson (3-801)*

- ❑ Activity Sheet 6 – Reinstate and Reactivate
- ❑ Reactivate and Reinstate Lesson (3-801)

**11:30 Lunch**

**12:30 Review of First Half of Day**

**12:45 Food Package Assignment and Family Summary Screens**

*Activity 7 – Review Assign Food Packages Lesson (3-500) and Family Summary Screen Lesson (3-1100)*

- ❑ Activity Sheet 7 – Assign Food Packages and Family Summary Screen – Fred Fossil
- ❑ Family Summary Screen Lesson (3-1100)
- ❑ Job Aid – Family Summary Screen Codes
- ❑ Assign Food Packages Lesson (3-500)
- ❑ Job Aid – Standard Food Package Codes
- ❑ Job Aid – Understanding Food Module Codes
- ❑ Job Aid – Cardinal Rules of Food Package Assignment and Voucher Dates
- ❑ Appointment Requests Lesson (4-301)
- ❑ Job Aid – Appointment Types

**2:15 Options for postpartum moms**

- ❑ Handout – Options for postpartum moms

**2:30 Temporary Newborn Certification**

*Activity 8 – Review Infant Certification Lesson (3-601)*

- ❑ Activity Sheet 8 – Temporary Newborn Certification
- ❑ Infant Certification Lesson (3-601)

**2:45 Break**

**3:00 Managing Print Queue, Printing Food Instruments, FI Stubs**

*Activity 9 – Review Lessons: Printing FIs – Print Queue (5-101), Appointment Requests (4-301)*

- ❑ Activity Sheet 9 – Manage Print Queue and Printing FIs
- ❑ Printing FIs – Print Queue Lesson (5-101)
- ❑ Job Aid – Checklist for Printing and Using FIs
- ❑ Handout – WIC Food List
- ❑ Handout – How to Shop With Your WIC Vouchers
- ❑ Handout – Voucher holder and sleeve
- ❑ Handout – Using Your Oregon WIC Vouchers
- ❑ Handout – 5 Easy Steps to WIC Shopping

**3:45 Policy for Replacing FIs**

- ❑ Job Aid – Policy Summary on Mailing and Replacing FIs

#### **4:00 Voiding and Replacing Vouchers**

*Activity 10 – Review Voiding Vouchers Lesson (5-105) and Category Change lesson (3-806)*

- ❑ Activity Sheet 10 – Voiding and Replacing Vouchers
- ❑ Job Aid – Voiding Vouchers
- ❑ Job Aid – Voucher Void Reasons
- ❑ Category Change (3-806)
- ❑ Handout – Dealing with Category Changes
- ❑ Handout – Standard Infant Formula Modules

#### **4:45 Review**

#### **5:00 Adjourn**

### **Day Two**

#### **8:00 Appointment Scheduling – Family Appointment Record**

*Activity 11 – Review Lessons: Appointment Scheduler Lessons (see below)*

- ❑ Activity Sheet 11 – Family Appointment Record
- ❑ Family Appointment Record Lesson (4-400)
- ❑ Schedule Appointment Now Lesson (4-402)
- ❑ Job Aid – How To Make an Individual Appointment
- ❑ Rescheduling an Appointment Lesson (4-501)
- ❑ Canceling an Appointment Lesson (4-502)
- ❑ Appointment Requests Lesson (4-301)
- ❑ Scheduling a Client into a Group Nutrition Education Appointment Lesson (4-403)
- ❑ Job Aid – How To Make a Group NE Appointment
- ❑ Printing Appointment Notices Lesson (4-700)
- ❑ Documenting Appointment Attendance Lesson (4-600)

#### **9:00 Appointment Scheduling – Daily Clinic Schedule**

*Activity 12 – Review Daily Clinic Schedule Lesson (4-202)*

- ❑ Activity Sheet 12 – Daily Clinic Schedule
- ❑ Daily Clinic Schedule Lesson (4-202)

#### **10:00 Break**

#### **10:15 Transfers and Terminations**

*Activity 13 – Review Transfers Lesson (3-804) and Termination Lesson (3-805)*

- ❑ Activity Sheet 13 – Transfers and Terminations
- ❑ Transfers Lesson (3-804)
- ❑ Terminations/Ineligible Lesson (3-805)

**11:00 Entering a Complaint**

*Activity 14 – Review Complaints Lesson (8-103)*

- ❑ Activity Sheet 14 – Entering a Complaint
- ❑ Complaints Lesson (8-103)

**12:00 Lunch**

**1:00 Review of First Half of Day – Answer Questions**

**1:15 Printing Vouchers at Group Nutrition Education**

*Activity 15 – Review Printing FIs – Printing from a Group Education Class Lesson (5-102)*

- ❑ Activity Sheet 15 – Printing from the Group NE Screen
- ❑ Printing FIs – Printing from a Group Education Class Lesson (5-102)

**2:00 Missed Nutrition Education**

*Activity 16 – Missed Nutrition Education*

- ❑ Activity Sheet 16 – Missed Nutrition Education
- ❑ Job Aid – Missed Nutrition Education Appointments and Nutrition Education Refusal
- ❑ Handout – Critical Thinking –Rescheduling After Missed NE

**2:45 Break**

**3:00 Foster Family and Custody Changes**

*Activity 18 – Review Foster Families and Custody Changes Lesson (3-808)*

- ❑ Activity Sheet 18 – Foster Family and Custody Changes
- ❑ Foster Families and Custody Changes Lesson (3-808)

**3:30 Issuing Farmers' Market Checks Individually**

*Activity 19 – Review Farmers' Market Coupon Issuance Lesson (3-1000)*

- ❑ Note: This activity will be covered only during Farmer Market season.
- ❑ Activity Sheet 19 – Farmers' Market
- ❑ Farmers' Market Coupon Issuance Lesson (3-1000)
- ❑ Job Aid – Farm Direct Check Issuance

**4:00 Final Review**

- ❑ Job Aid – Application Support
- ❑ Job Aid – TWIST Troubleshooting
- ❑ Job Aid – Process Summary

**4:30 Adjourn**