

😊 Job Aid: Transaction Types

Chapter 3: Client Processes

Section 8: Other Client Processes

Lesson: Transaction Types

Code	Transaction Type	More Information About Transaction Types
P	Prescreening	<ul style="list-style-type: none"> ◆ Code automatically displays in “Prescreening” function. ◆ Automatically changes from “P” to “N” when a prescreened client is brought over to “Enrollment” function.
N	New Enrollment	<ul style="list-style-type: none"> ◆ Code automatically displays in “Enrollment” function. ◆ Automatically changes from “N” to “C” when a record is saved with all tabs completed.
R	Recertification	<ul style="list-style-type: none"> ◆ Manually select code when recertification is being done. ◆ Automatically changes from “R” to “C” when all recertification functions tabs are complete. ◆ User can manually choose “R” within 30 days of the Certification End Date. ◆ “R” cannot be selected or displayed if New Enrollment is not complete. ◆ When a TNB infant returns to complete the certification at < 42 days, the user will select “R.”
D	Display	<ul style="list-style-type: none"> ◆ “D” will automatically display after a client has been terminated and the information saved. <p><i>See also code T.</i></p>
C	Change	<ul style="list-style-type: none"> ◆ Code automatically displays for all active clients. ◆ Can make any changes on a client record in the “Enrollment” or “Certification” function when “C” displays.

Code	Transaction Type	More Information About Transaction Types
N	Temporary Newborn	<ul style="list-style-type: none"> ◆ Code automatically displays in “Temporary Newborn” function. ◆ Can only be accessed from mom’s record. ◆ Automatically changes from “N” to “C” when all tabs are completed. ◆ “R” must be manually selected when baby is due for certification completion (>42 days).
A	Re-Activate	<ul style="list-style-type: none"> ◆ User manually selects “A” to re-activate a client when client has been terminated within their certification period and needs to be active again. ◆ Automatically changes from “A” to “C” when record is saved.
I	Transfer-In Within Oregon	<ul style="list-style-type: none"> ◆ Code automatically displays in “Transfer-In Within Oregon” function. ◆ Automatically changes from “I” to “C” when client is brought over to “Enrollment” function. ◆ If client was terminated within certification period and then transferred, “A” (Re-activate) displays first and then changes to “C” when brought over to “Enrollment” function.
O	Transfer-In Outside Oregon	<ul style="list-style-type: none"> ◆ Code automatically displays in “Transfer-In Outside Oregon” function. ◆ Automatically changes from “O” to “C” when client is brought over to “Enrollment” function.
T	Terminate	<ul style="list-style-type: none"> ◆ User manually selects “T” and the system changes it to “D” when information is saved. ◆ “D” automatically displays when system terminates a client.
X	Reinstate	<ul style="list-style-type: none"> ◆ Used for terminated clients more than 30 days past their certification end date. ◆ Used for women who are termed or within a current cert period who come in to be certified for a new pregnancy. ◆ Automatically changes from “X” to “R” when “Enrollment” function is completed. ◆ All recertification functions must be completed in order to issue vouchers.