

Chapter 3: Client Processes

Section 4: First Nutrition Education Contact

Lesson: Interventions

Objectives:

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

- utilize “Last Visit Summary” and “Risks/Interventions” screens; and
- explain and utilize nutrition education interventions.

Oregon Policies:

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

Overview:

TWIST provides you with a variety of screens to document client’s information. The “**Last Visit Summary**” and “**Risks/Interventions**” screens consolidate information and are a useful starting point for providing nutrition education.

Instruction:

Accessing the “Last Visit Summary” Screen

This screen can be used to view nutrition education information from the client’s last visit.

The starting point for this lesson is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Nutrition Education Plan

♪ NOTE: At an initial certification visit all sections will be blank.

♪ NOTE: This screen will be covered in Chapter 3 Lesson 900 *Individual Follow-up* and Chapter 3 Lesson 700 *Recertification*.

Accessing the “Risks/Interventions” Screen

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Nutrition Education Plan

1. **Click the “Risks/Interventions” tab to view the screen.**
 - The client’s **“Risks/Interventions”** are displayed.
 - The combined **“Risk Factors”** from the **“Health History”** screen and **“Diet Assessment”** screen are displayed.
 - System assigned risks will be displayed in bold.
 - Intervention recommendations assigned to the risk can be viewed here.

2. **To add additional risks, click the “Insert” icon.**

The **“Visit Date”** field defaults to the current date, but may be modified.

3. **Tab to the “Risk Code” field and use the drop down arrow to select the risk you wish to add.**

If an intervention is associated with the risk it will be displayed.

4. **Double click on an “Intervention” to view the complete information about the recommended intervention.**

The complete intervention will be displayed in the **“Intervention Text”** pop-up.

Visit Date	Risk Code	Risk Factors	Intervention
11/19/2002	101	PREPREGNANCY UNDERWEIGHT	
11/19/2002	402	MEGAN DIETS	

Figure 1: “Risks/Interventions” Screen

5. **Click “OK” or “Cancel” to close the pop-up.**
6. **Tab to the “Risk Level” field.**

This field defaults to a system generated risk level based on the client’s risks, but it may be modified using the drop down menu.

♪ NOTE: The “**Priority**” field defaults to the appropriate priority and may not be changed.

7. **Save.**

Adding a Local Intervention

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Nutrition Education Plan

1. **Double click on the Intervention Text line for the risk code for which you are adding text.**
 - The upper box is display only and may contain the state intervention text.
 - The lower box is for the local intervention text. The cursor will appear in the lower box for you to begin typing.
2. **Type your intervention text in the lower box.**
3. **Click “OK.”**

Save.

✂ Tips and Shortcuts:

- Risks may be added in this screen but can be deleted only in the “Health History - Risk Factors” and “Diet Assessment - Risk Factors” screens.
- To remove a blank row before a risk is assigned use the “Remove” icon.

↪ Practice Activities:

Use the client from the ◀ Activity Sheet for this practice.

The starting point for this activity is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Nutrition Education Plan

1. Click the “Risk/Interventions” tab at the bottom of the screen.

2. Click on the “Open” icon to access “Client Search” and select the client from your  Activity Sheet.
3. Click the “Return with Client” button.
4. Review the information displayed.
5. Double click on a risk to view the “Intervention” pop-up.
6. Click “OK” to close the pop-up.
7. Click on the “Visit Date” field and click the “Insert” icon to add a blank row.
8. Tab to “Risk Code” and select a risk from the drop down list.
9. Tab to the “Risk Level” field and select the change the risk level.
10. Save and exit.

Skill Check:

Retrieve a client for client primary.

Find a partner for this activity. You and your partner will take turns counseling each other on a nutrition education topic. Be sure to use the client name listed on the Activity Sheet.

1. Access the complete “Intervention” for help with the counseling topic you choose.
2. *Print the “Intervention Text” pop-up that you use. Write your name on the print out and turn it in to the instructor.*

Notes:

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Lesson: Nutrition Education Provided

Objectives:

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

- select Nutrition Education (NE) topics and materials;
- describe the NE topics and material, their meaning, and how they are organized.

Oregon Policies:

- ◆ Policy 425 Ordering State Produced Materials
- ◆ Policy 800 Nutrition Education: Introduction and Overview
- ◆ Policy 830 Nutrition Education: Documentation
- ◆ Policy 840 Nutrition Education Materials: Evaluation Criteria

Overview:

Accounting for all the nutrition education materials you share with your clients can be overwhelming. TWIST simplifies tracking this information. The “**NE Provided**” screens allow you to document the dates and topics discussed and any materials provided. This, as well as previous certification information, can be reviewed at any time. The client will no longer say, “You gave that handout to me already. Do you have anything different?”

Instruction:

Documenting NE Provided and Materials Provided

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Nutrition Education Plan

- 1. Click on the “NE Provided” tab at the bottom of the window.**

Client Processes - [CP311S - Woman Certification State ID:2351357 Name:Pregnant, Woman DOB:10/10/1975]

File Edit Window Help

Selection

WIC ID: 00773326-01 Name: Pregnant, Woman DOB: 10/10/1975 WIC Cat.: WOMAN, PREGNANT Tr.Type: N

Medical Data Health History Diet Assessment **NE Plan** Progress Notes BF Tracking Food Pkg. Assignment

NE Provided

Date Provided	Topic
11/19/2002	EXERCISE

Materials Provided

Date Provided	Title	Form No.
11/19/2002	Breastfeeding... The Gift of Love (Spanish)	US-756-SPN-BF

Insert Remove Search By Topic

Last Visit Summary Risks/Interventions **NE Provided** Goals Referrals Next Appointment

Change Transaction Type Determine Eligibility

Save November 19, 2002 09:56:05 AM Julia Hansel Douglas CHD

Figure 1: “NE Plan – NE Provided” Screen

2. Retrieve the client for whom you want to document education provided.
3. Click on the “Date Provided” field in the “NE Provided” section.

The “**Date Provided**” field defaults to the current date, but may be modified.

4. Tab to the “Topic” field and select the topic for your client from the drop down list.

Click the “**Insert**” icon to add a new row.

5. Click on the “Date Provided” field in the “Materials Provided” section.

This field defaults to the current date, but may be modified.

6. Tab to the “Title” field and select a material title.

The “**Form No.**” field will auto fill with the appropriate form number.

7. Click the “Search By Topic” button to search for a material by a general topic.
8. Select a “Topic”, “Sub-Topic”, and “Form Title”.
9. Click “OK” or “Cancel” to close the pop-up.
10. Save.
11. Exit.

♪ NOTE: Click on the “Insert” button to add a new row.

↪ **Practice Activities:**

Use the information for the client from your ☛ Activity Sheet for this practice.

The starting point for this activity is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Nutrition Education Plan
⇒ NE Provided

1. Retrieve the client for whom you wish to document education provided.
2. Click in the “Date Provided” field and verify the date.
3. Tab to “Topic.”
4. Select the appropriate topic.
5. Click the “Date Provided” field in the “Materials Provided” section.
6. Verify the date.
7. Tab to the “Title” field.
8. Select the appropriate handout.
9. Click the “Insert” button to add a new row.
10. Click on the “Search By Topic” button.
11. Select a “Topic”, “Sub-Topic” and “Form Title” from the drop down lists.
12. Click “OK” to exit the pop-up.
13. Click the “Remove” button to remove the second row.
14. Save.
15. Exit.

✓ **Skill Check:**

For this exercise you will document additional Nutrition Education provided to a client.

Today you see a new prenatal client. Based on her nutrition risks, document two nutrition education topics of her choice with the appropriate materials provided.

Do a screen print of the “NE Provided” screen. Write your name on the screen print before turning it in to the instructor.

 **Notes:**

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Lesson: Next Steps

Objectives:

Upon the completion of this lesson all users will be able to:

- operate and print the “Nutrition Education - Next Steps” screen; and
- define the meaning of the status of the participant’s nutrition education “Next Step”.

Oregon Policies:

- ◆ 820 Nutrition Education: Participant Contacts
- ◆ 830 Nutrition Education: Documentation

Overview:

At the beginning of each certification period we help our clients decide what steps they are willing to take towards improving their health or diet. We call these decisions “Next Steps” to show the steps they are willing to take. Throughout the certification period we assess their progress and, if necessary, redefine the “Next Steps” to ensure they are working for the client. Recording our clients’ progress is simplified in TWIST. The “Next Steps” screen provides one location in which the chosen step and the progress on the step is documented. Also available on the screen is the client’s nutrition education visit history. This information will be useful as staff track the client’s progress towards the change they are working on.

Instruction:

Documenting Next Steps

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Nutrition Education Plan

1. **Click on the “Next Steps” tab at the bottom of the screen.**

Figure 1: “NE Plan – Next Steps” Screen

2. **Retrieve the client for whom you want to document “Next Steps.”**
3. **Click in the “Visit Date” field.**

This field defaults to the current date but may be modified.

4. **In the “Next Steps” field, enter the step your client has identified.**
 - This is freeform text.
 - If the client has more than one step, click “Insert” icon to add a new row.
5. **Select the appropriate “status” for the step they have identified.**

☺ See Job Aid “Next Steps Statuses” for more information.

6. **Tab to the “Date Ended” field.**

When a “Status” is selected which end dates the row, this field defaults to today’s date but may be changed.

♪ NOTE: The “**NE Visit History**” displayed in the lower section of the screen is populated from the “Last Visit Summary” screen. This section is display only.

7. **Save.**

8. **Exit.**

✂ Tips and Shortcuts:

- To add additional rows of information click the “Insert” icon.
- Once a row has been saved it may not be removed.

↪ Practice Activities:

Use the client from your 🗑 Activity Sheet for this practice.

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ NE Plan ⇒ Next Steps

1. Click on the “Open” icon to access “Client Search” and search for the client from your 🗑 Activity Sheet.
2. Click the “Return with Client” button.
3. Leave the date as today’s date.
4. Tab to “Next Step” and enter Increase to 5 servings of fruits and vegetables daily.
5. Change the “Status” to “In Progress”.
6. Save your work.
7. Exit back to the “Client Processes” window.

✓ Skill Check:

Retrieve a certified prenatal client.

For this exercise you will be helping your client review Next Steps set at the last appointment. Change the status of her current steps and add a new one.

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Lesson: Referrals

Objectives:

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

- utilize the “Referrals” tab and print referrals.

Oregon Policies:

- ◆ 470 Local Program Outreach
- ◆ 481 Immunization Screening and Referral Protocol
- ◆ 830 Nutrition Education: Documentation
- ◆ 880 Referrals: Alcohol, Tobacco and other Drug Use
- ◆ 885 Other Referrals: Required and Recommended

Overview:

Referring clients to other services is an important part of WIC. In the “Nutrition Education Plan” function you can document all referrals given to a client and print the information for the client to take. This time-saving feature allows you to keep quality records of referrals and provides referral agency information that is available at the click of a button. In this lesson you will learn how to document referrals and print out referral information.

Instruction:

Documenting Referrals

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Nutrition Education Plan

1. Click on the “Referrals” sub-tab at the bottom of the screen.

Client Processes - [CP3115 - Woman Certification State ID:1763 Name:Baker, First DOB:09/09/1977]

File Edit Window Help

Selection

WIC ID: 03450150-01 Name: Baker, First DOB: 09/09/1977 WIC Cat.: WOMAN PREGNANT Tr.Type: N

Medical Data Health History Diet Assessment NE Plan Progress Notes BF Tracking Food Pkg. Assignment

Referrals

Visit Date	Referral Category	Organization	Phone Number	Status	Date Ended
09/12/2001	EMERGENCY FOOD SOURCES	Example	(426)518-4587 x0	Recommended	00/00/0000
09/12/2001	CHILDREN WITH SPECIAL HEAL'	Planned Parenthood Association	(123)123-1234 x12344	Recommended	00/00/0000

More Info.

Last Visit Summary Risks/Interventions NE Provided Goals Referrals Next Appointment

Change Transaction Type Determine Eligibility

Ready | September 17, 2001 03:40:28 PM | Jeff Waite | Hood River

Figure 1: “NE Plan – Referrals” Screen

2. Retrieve the client for whom you want to document referrals.
3. Click in the “Visit Date” field.

This field defaults to the current date but may be modified.

4. On the “Referral Category” field, select the type of referral you want to make.
 - The referral categories are state populated.
 - Referral categories include, but are not limited to “BreastfeedingServices,” “Food Resources,” and “Immunizations.”

♪ NOTE: The referral information entered on the “Enrollment” screen will carry over to the “NE Plan – Referrals” screen.

5. **Tab to the “Organization” and select the appropriate organization.**

- The “**Phone Number**” is system generated if the organization information has been completed.
- More referral organizations can be added. Refer to Chapter 8 Lesson 102 *Referral/Outreach Organizations (SUT)*.

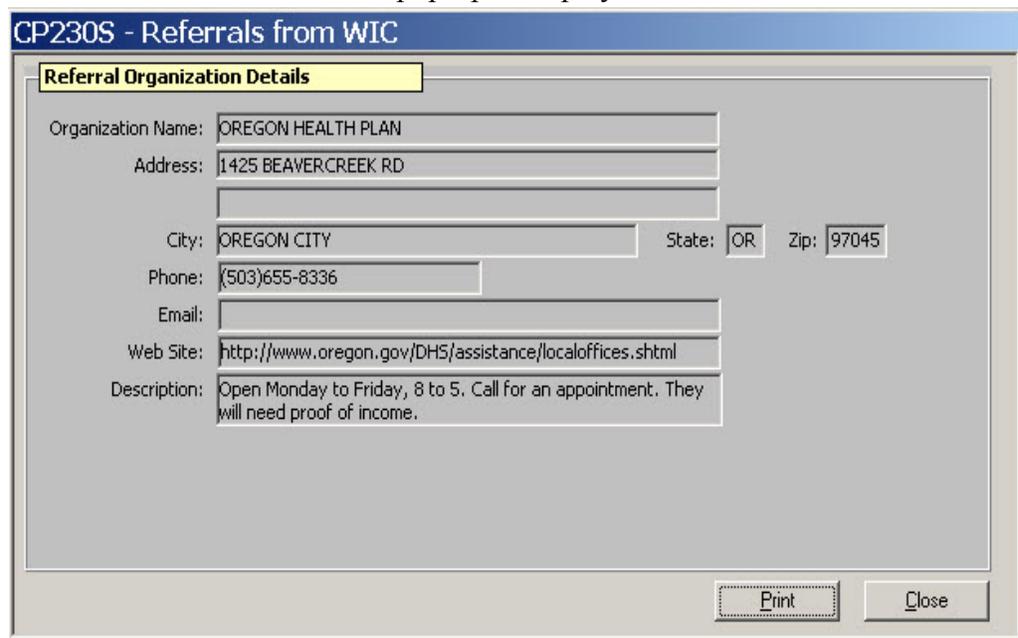
On the “Status” field, select the current status of the referral.

- The “**Date Ended**” field is grayed out until the “**Status**” is marked as “Completed.”
- When the “**Status**” is marked as “Completed,” “Not Addressed,” “No Longer Applicable,” “Participating,” or “Refused” this field defaults to today’s date but may be modified.

☺ **See Job Aid “Referral Statuses” for more information.**

6. **Save.**
7. **Select the organization for which you wish to print referral information.**
8. **Click the “More Information” button in the lower right hand corner of the screen.**

The “**Referrals from WIC**” pop-up is displayed.



The screenshot shows a window titled "CP230S - Referrals from WIC". Inside the window, there is a section titled "Referral Organization Details" with the following information:

Organization Name:	OREGON HEALTH PLAN		
Address:	1425 BEAVERCREEK RD		
City:	OREGON CITY	State:	OR
Phone:	(503)655-8336	Zip:	97045
Email:			
Web Site:	http://www.oregon.gov/DHS/assistance/localoffices.shtml		
Description:	Open Monday to Friday, 8 to 5. Call for an appointment. They will need proof of income.		

At the bottom right of the window, there are two buttons: "Print" and "Close".

Figure 2: “Referrals from WIC” Pop-Up

9. **Click “Print” to print the referral information.**
10. **Click “Close” to close the pop-up.**
11. **Exit.**

Tips and Shortcuts:

- To add additional rows of information, click the “Insert” icon or press tab when in the “Date Ended” field.
- To remove a row of information, use the “Remove” icon.

Practice Activities:

Use the client from your  Activity Sheet for this practice.

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ NE Plan ⇒ Referrals

1. Click on the “Open” icon to access “Client Search” and select the client from your  Activity Sheet.
2. Click the “Return with Client” button.
3. Leave the “Visit Date” field as **today’s date**.
4. Tab to “Referral Category” and select **Oregon Health Plan/Medicaid**.
5. Tab to “Organization” and select the appropriate organization.
6. Tab to “Status” and select **Completed** as the “Status.”
7. Enter **today’s date** in the “Date Ended” field.
8. Click the “More Info.” button.
9. Click “Print” to print the referral information and then close the pop-up.
10. Save your work.
11. Exit back to the “Client Processes” window.

You’re doing great! Let’s try one more set of referrals before we move on.

Skill Check:

For this exercise you make two referrals for your client. Retrieve a postpartum client from client primary.

The client is a 20-year-old breastfeeding mother with a six-week-old infant. The mother has just lost her job at a local fast food restaurant, but is hoping to find part-time employment soon. She needs breastfeeding support after hours and weekends and financial support to help her through this difficult period. Make two appropriate referrals for her.

Make printouts with the referral information to give to the client. Write your name on them before turning in to the instructor.

 **Notes:**

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Lesson: Progress Notes

Objectives:

Upon the completion of this lesson all users will be able to:

- utilize and interpret the “Progress Notes” tab; and
- distinguish between “Progress Notes” and other “Notes” in TWIST.

Oregon Policies:

- ◆ 830 Nutrition Education: Documentation

Overview:

It is important to document information on each client and TWIST provides you with a variety of screens and pop-ups to ensure all pertinent information is recorded.

There are several “notes” functions in TWIST. Most pertain specifically to the area where they are found. For instance, notes on the anthropometrics screen refer specifically to information found on that screen. Notes in the intake area are available to all staff and would be similar to the sticky notes that we find in all paper charts.

“Progress Notes,” however, are free-form medical-record notes in the traditional SOAP format (subjective, objective, assessment, plan) and are to be used primarily by a high-risk counselor for a care plan or by the certifier to note information specific to a person’s risk criteria or certification. Information entered in Progress Notes should be information that would not normally be entered in a regular TWIST field.

Instruction:

Documenting Progress Notes

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Progress Notes

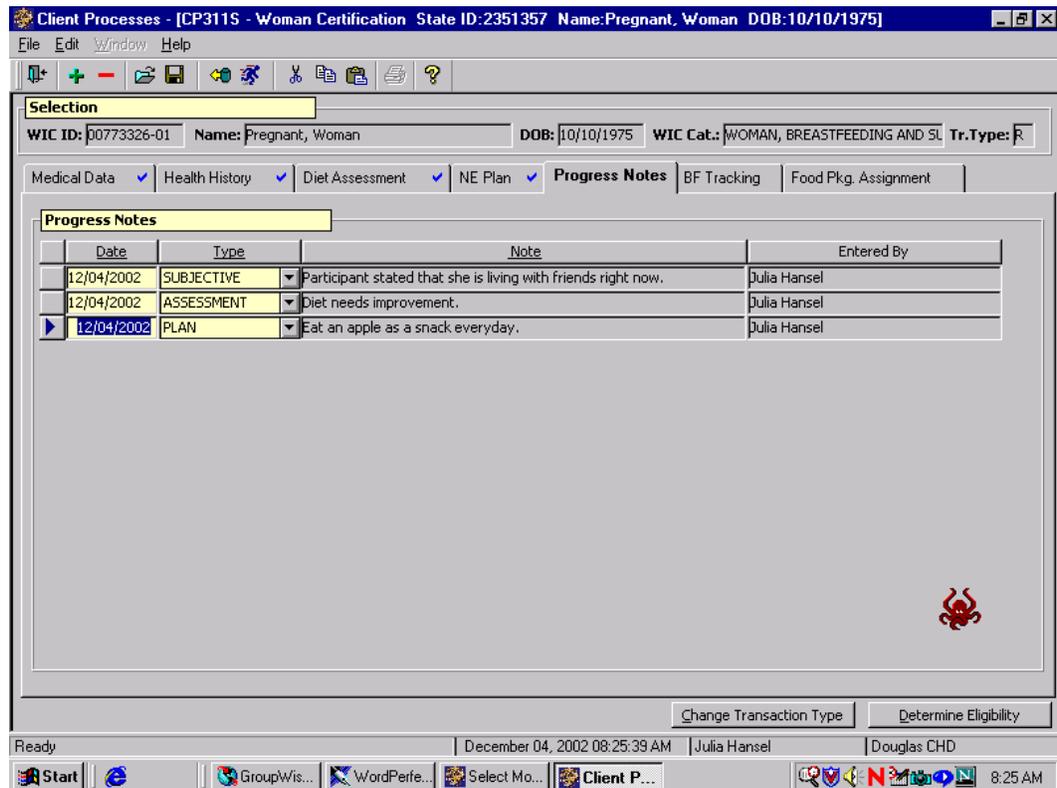


Figure 1: “Progress Notes” Screen

1. **Retrieve the client for whom you want to document a progress note.**
2. **Click in the “Date” field.**

This field defaults to the current date but may be modified.
3. **Tab to the “Type” field and select the type of note you want to make.**
4. **Double click in the “Notes” field to open the “Notes” pop-up.**

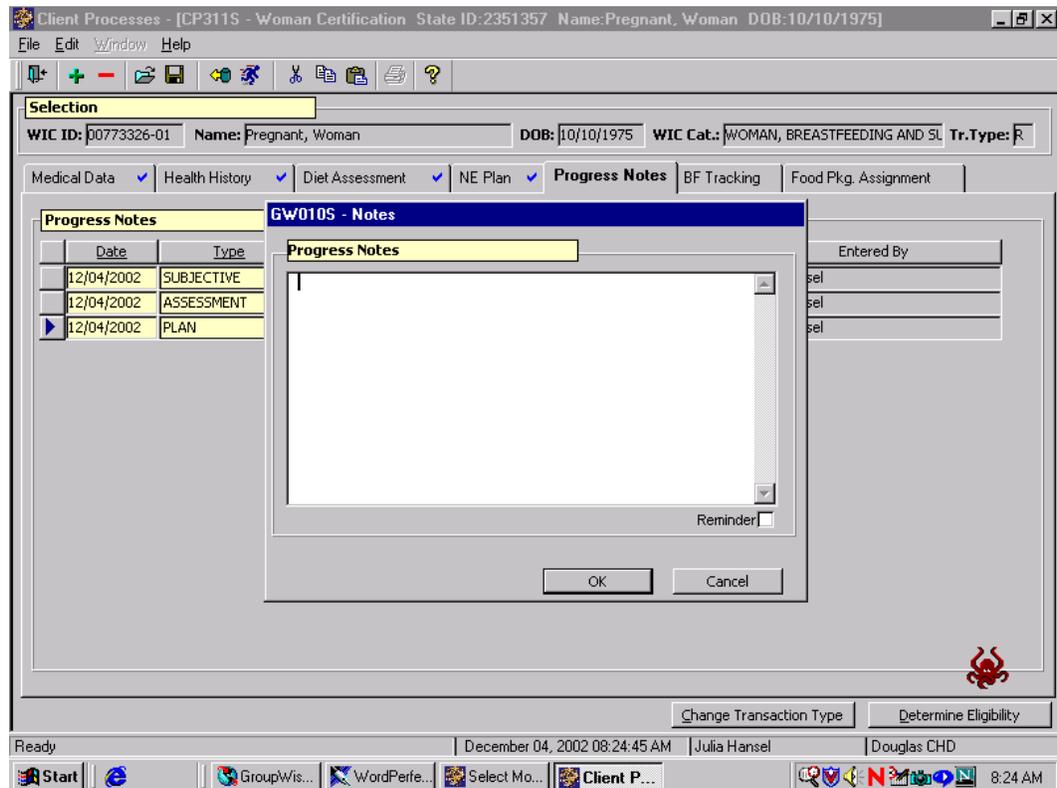


Figure 2: “Notes” Pop-Up

5. **Enter your note.**

- The note is entered in free-form text.
- Once a progress note has been entered, the “Progress Notes” tab will automatically be 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 if the information is “sensitive.”
- To mark a note as sensitive, click the “Reminder” box in the lower right-hand corner.
- When a note has been recorded as sensitive, the blue note on the “Progress Notes” tab turns **red**.

6. **Click “OK” to save the note and close the pop-up.**

Click “Cancel” to close the pop-up without saving the note.

🎵 NOTE: The “**Entered By**” field is system generated with the user’s log on name. This is another good reason NOT to share your password.

♪ NOTE: To review a note, you can double click in the field. However, to add a note, you must use the insert icon.

7. **Save.**

8. **Exit.**

✂ **Tips and Shortcuts:**

- To add additional rows of information click the “Insert” icon.
- Once a row has been saved it may not be removed.
- Use the Progress Notes Summary Report to print a client’s progress notes.

↪ **Practice Activities:**

Use the client from your 🗑 Activity Sheet for this practice.

The starting point for this section is:

Client Processes ⇒ Certification ⇒ Woman ⇒ Progress Notes

1. Click on the “Open” icon to access “Client Search” and find your client.
2. Click the “Return with Client” button.
3. Leave the date as **today’s date**.
4. Tab to “Type” and select **Assessment**.
5. Tab to “Notes” and double click to open the “Notes” pop-up.
6. Enter the following: “Doing a great job learning the new system!”
7. Click “OK” to save and close the pop-up.
8. Save your work.
9. Exit back to the “Client Processes” window.

You’re doing great! Let’s try another note before we move on.

✓ **Skill Check:**

For this exercise you will enter a note for a client.

This will be a sensitive note. The note should be dated yesterday and indicates that the client is involved in a domestic violence situation. Write the note.

Do a screen print of the window with the “Notes” pop-up opened. Write your name on the screen print before turning it in to the instructor.