

Chapter 9: Financial Management

Section 2: Priority Freezing

Lesson: Special User - Priority Freezing

Objectives:

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

- set priority freezing for different priorities; and
- end-date priority freezing when no longer needed.

Oregon Policies:

- ☒ 475 Waiting List
- ☒ 653 Participant Transfers Into and Out of State of Oregon
- ☒ 654 Participant Transfers Within State
- ☒ 670 Risk Criteria Overview

Overview:

Priority freezing is a tool to manage caseload when a local WIC agency is serving its maximum assigned caseload. The Waiting List policy should be reviewed carefully and the decision to freeze priorities discussed with and approved by the state WIC office before a local agency freezes priorities. A participant who, at certification or recertification, falls into a priority that is frozen will not be able to be certified. You will have the option to place the participant on the “Priority Ineligible” wait list to track these participants in the event that you are later able to un-freeze that priority and serve more participants.

The participant priority system for Priorities I through VI must be followed when freezing priorities. For example, a local program cannot freeze priority V unless they have first frozen priority VI. The Priority Freezing function also allows for prioritizing within a priority to more closely manage caseload. For example, you may choose to freeze Priority V four year olds, while still serving Priority V children who are less than four year olds.

Please be sure to review the TWIST lesson on “Wait Lists” in Chapter 4, Section 8, when planning on using the priority freezing function.

Instruction:**Freezing Priorities**

The starting point for this section is:

Financial Management → Caseload → Priority Freezing

1. **Add a new row using the green “+” sign if needed.**

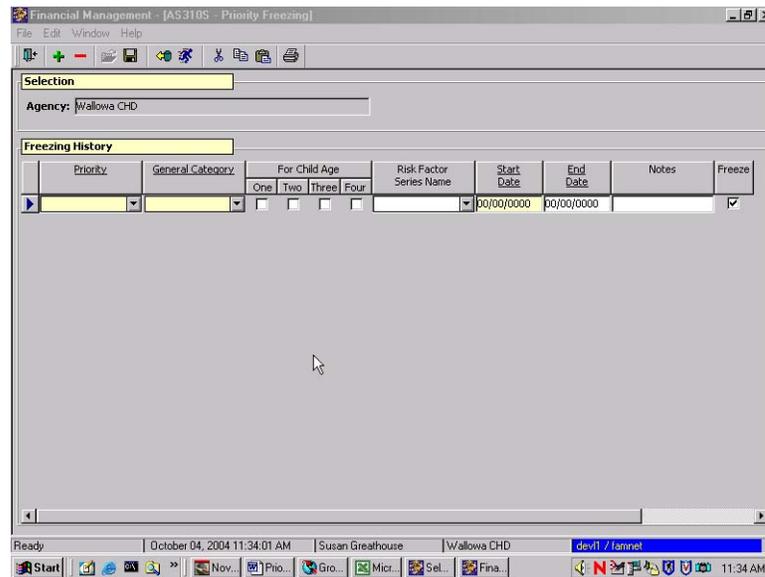


Figure 1: "Priority Freezing" Screen

2. **Select the Priority you want to freeze from the drop down window.**

+ NOTE: You must freeze the lowest priority first. Refer to Policy 475 for requirements around priority freezing.

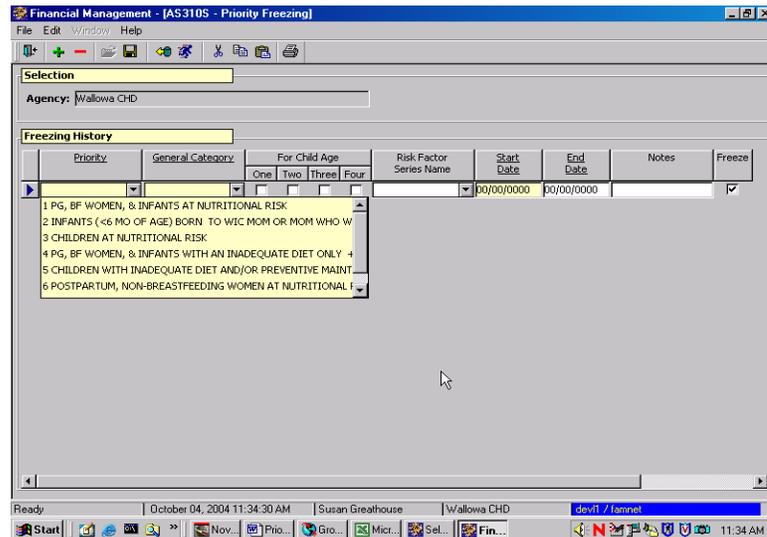


Figure 2: Selecting Priority Level

3. Select the General Category from the drop down window.

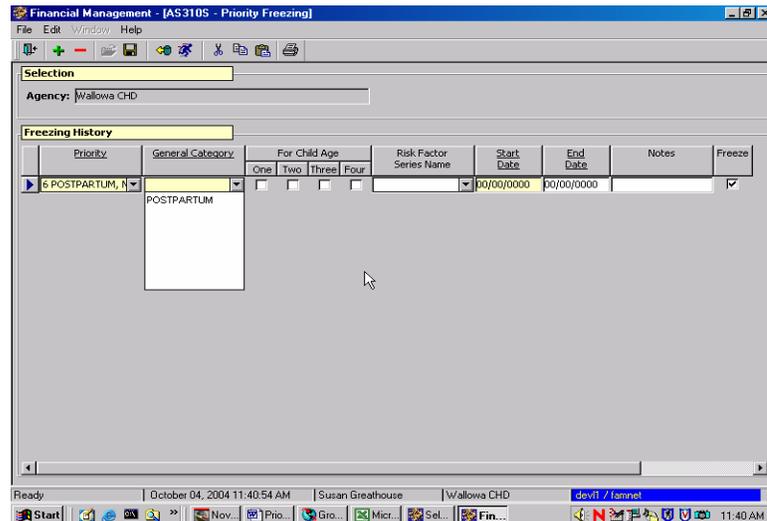


Figure 3: Selecting the "General Category"

4. If you are freezing either Priority V or Priority III, select the appropriate "Child Age" by clicking in the box under that age.

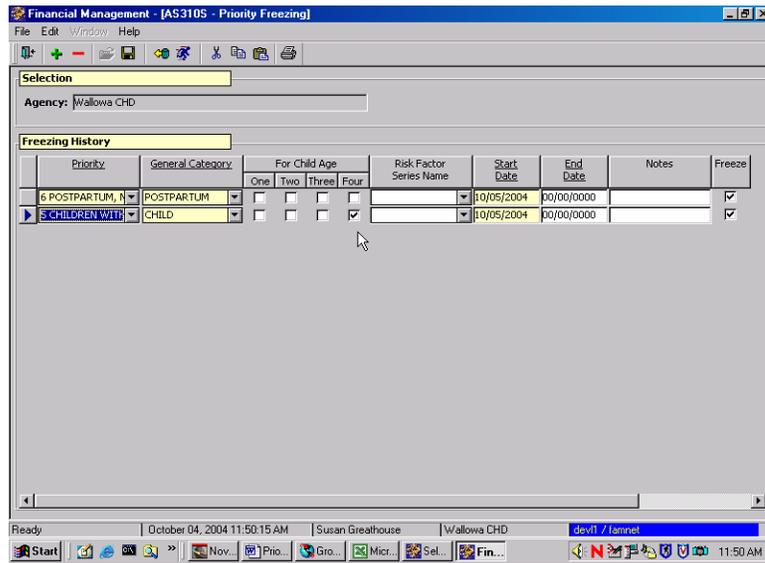


Figure 4: Selecting "Child Age"

+ NOTE: If you are freezing for more than one age of children, for example 3 and 4 year olds, you will need to use a separate row for each age.

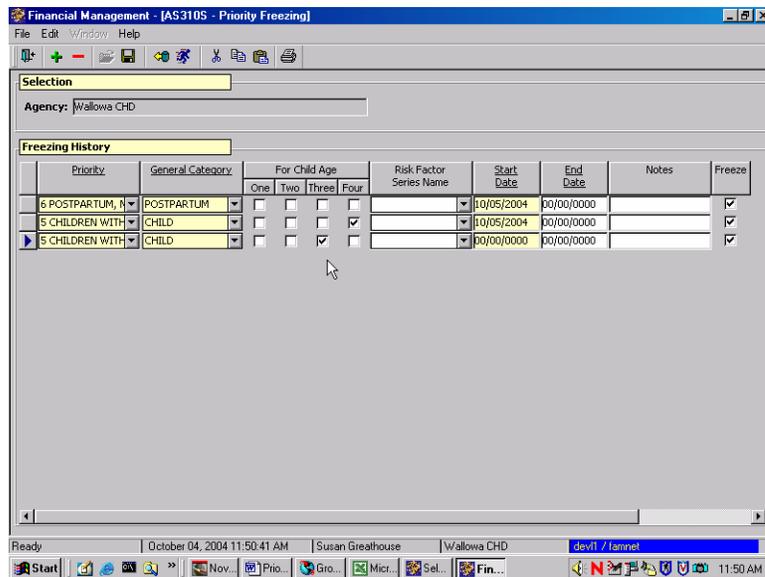


Figure 5: Selecting More Than One "Child Age"

5. **Enter the “Start Date” when you want the Priority Freezing to take effect.**
 - It is not necessary to enter an end date at this point unless you know when you are going to stop freezing for that priority.

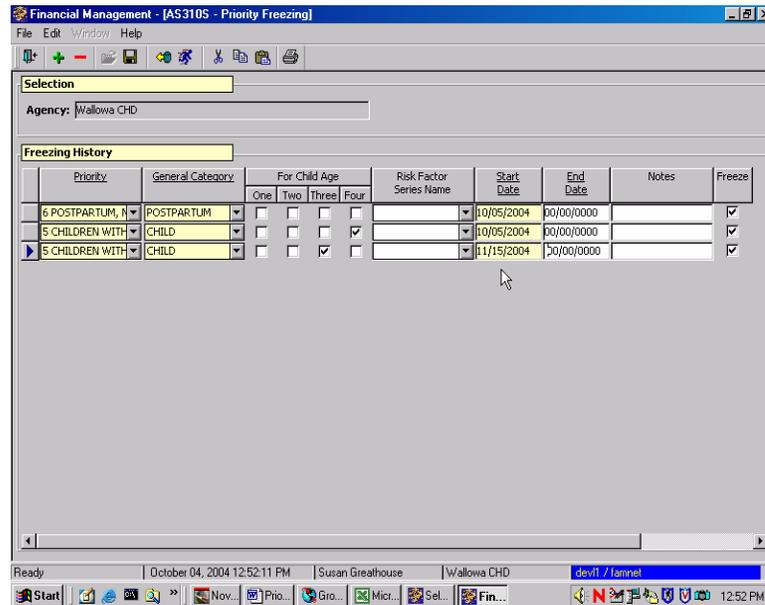


Figure 6: Entering a "Start Date"

6. **Enter notes if needed into the “Notes” field by double-clicking in the “Notes” box and typing in your note.**

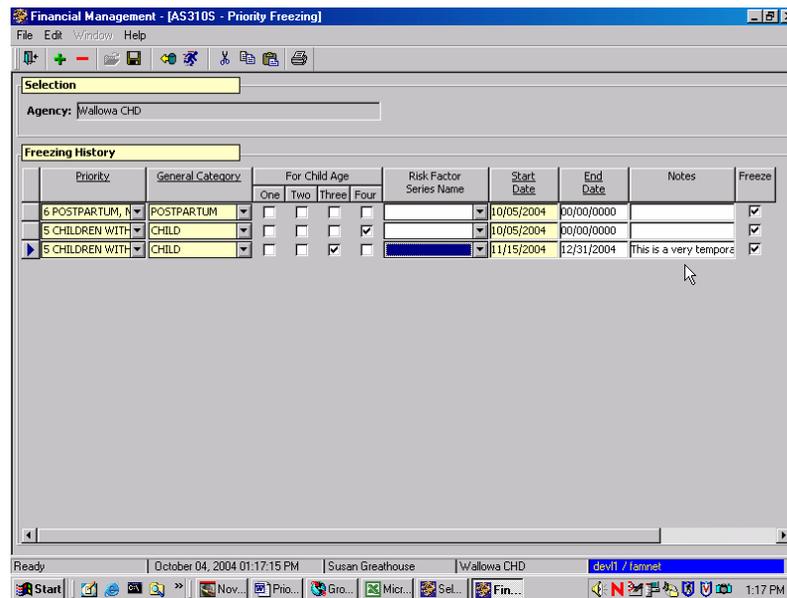


Figure 7: Adding "Notes"

7. **Save and exit.**

(Practice Activity 1:

Using your K Activity Sheet, follow the steps below to.

The starting point for this section is:

Financial Management → Caseload → Priority Freezing

1. Select "6 Postpartum Non-Breastfeeding Women" in "Priority"
2. Select "Postpartum" in the "General Category"
3. Enter today's date in the "Start Date"
4. Save and exit.

Ending Priority Freeze

Once you save a Priority Freeze screen, you cannot remove that row. In order to end priority freezing, you must enter an end date in that row in the "Priority Freezing" screen.

The starting point for this section is:

Financial Management → Caseload → Priority Freezing

1. Enter the date when you want to end priority freezing in the “End Date” for the priority that you are “un-freezing”.

+ NOTE: Remember, you must unfreeze the highest priority first.

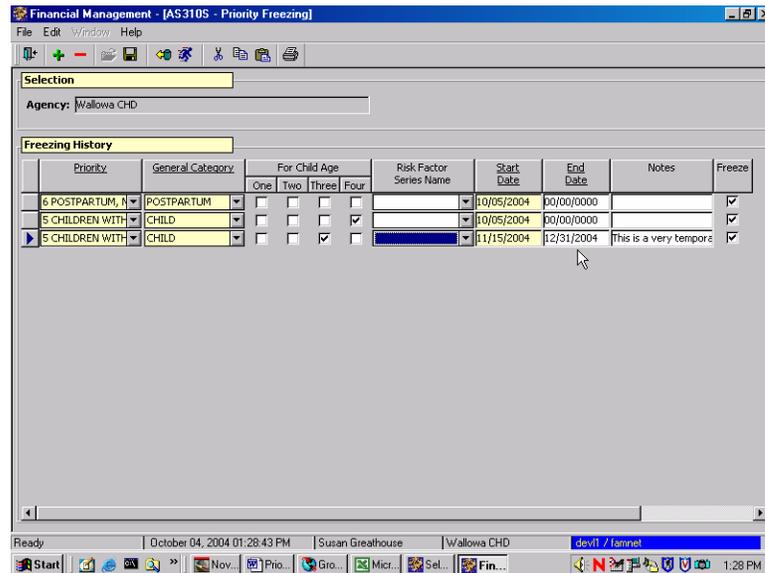


Figure 8: "End Date" for Removing Priority Freeze

2. Save and exit.
3. Check your agency’s “Priority Ineligible Wait List” (if you have been using that function), to see if there are any participants who were in a “frozen” priority who are still eligible to be reactivated.
 - You will want to contact participants to see if they are still in your service area and interested in participating in WIC again. If so, you can reactivate them from the Intake screen and issue FI’s.

(Practice Activity 2:

Using your K Activity Sheet, follow the steps below to.

The starting point for this section is:

Financial Management → Caseload → Priority Freezing

1. Enter an end date 3 months from today under “End Date” for the Priority 6 category that was frozen earlier.
2. Save and exit.

***N*Notes:**