ADHS WIC:
HANDS New Hire
Training Part 1

Companion Manual

Disclaimer: Please note the image shown on each page of this manual offer a navigation point for you while going thru the course. It displays all the graphics on the page in one thumbnail, this is not in error.

MODULE 1 - INTRODUCTION TO HANDS

1.1 WELCOME

Notes:

Health and Nutrition Delivery System (HANDS) New Hire Course
Arizona Department of Health Services

1.2 INTRODUCTION

Notes:

Welcome to WIC. We're happy to have you on our team. Arizona WIC and its partners worked together to create the Health and Nutrition Delivery System, or HANDS.

The computer program HANDS is a tool that assists and supports you in serving our clients in the best, most efficient way possible. It helps you enroll clients in the WIC program, document the services you provide, and issue benefits, while you connect with each participant.

While HANDS is an incredible tool, it is important to remember that your critical thinking, active listening, and participant-centered service skills are what really make a difference in the lives of our clients. The connection you make with each participant can truly make a difference. With that in mind, let's get started!

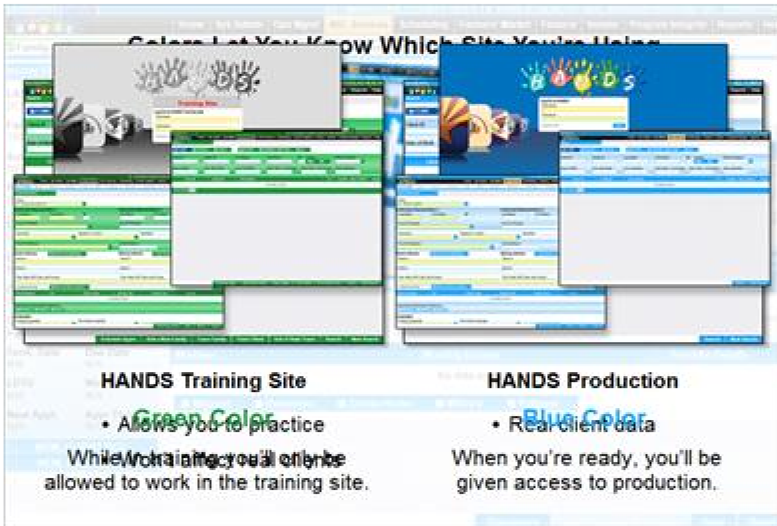
1.3 COURSE OVERVIEW

Notes:

Hi, my name is Victoria.
I'm a WIC staff member, and like you, my goal is to help women and their families. Over the next few modules, I will be teaching you about HANDS. After you finish this training, you will be able to use HANDS to start the certification process, which includes registering families and clients and documenting eligibility. You will also be able to utilize your customer service skills to enhance the WIC experience for our participants.

But first, we will cover the basics and learn how to use the HANDS tool, including navigating the system. I will also teach you about the Login and Home screens. Thank you for joining me on this journey. I'm excited to share my experience with you. Together we can make a difference in the lives of women and their families.

1.4 INTRODUCTION TO HANDS



Notes:

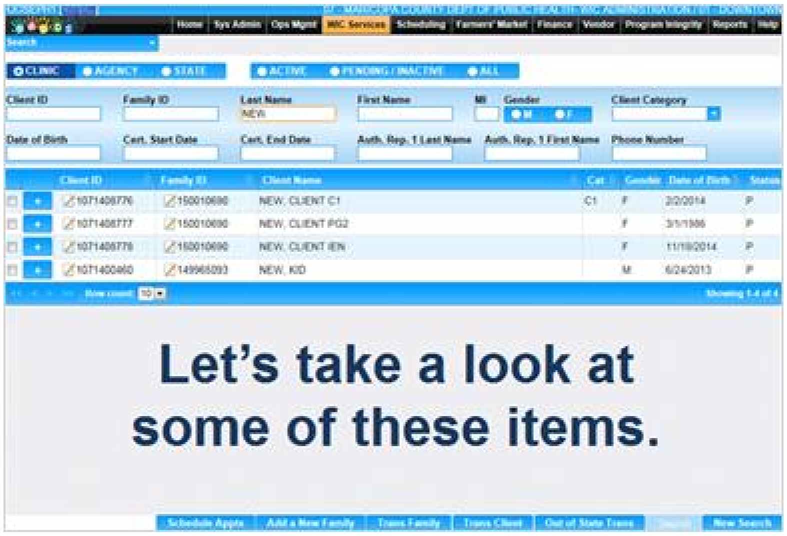
During the course, you'll see both green and blue example screens. These colors let you know which HANDS site you're using.

To assist staff members with training, there is a HANDS Training site. This site allows you to practice all of the skills you learn. You can create fake clients and issue benefits to those clients. These fake clients won't affect the real client data, which is found in HANDS Production.

The screens in HANDS Training are primarily green, while the screens in HANDS Production are blue. While in training you'll only be allowed to work in the training site. When you're ready, you'll be given access to production and you'll be allowed to create real client files and issue benefits.

In this module, you will learn about items in HANDS that work the same throughout the system. These include certain actions you may perform, how some fields are formatted, the layout of grids, and the different lists you will use to select items, which are called pick lists. You will also learn about how HANDS communicates with you using system messages. In addition, I will teach you about the HANDS Login screen and the Home screens.

1.5 STANDARDIZED ITEMS

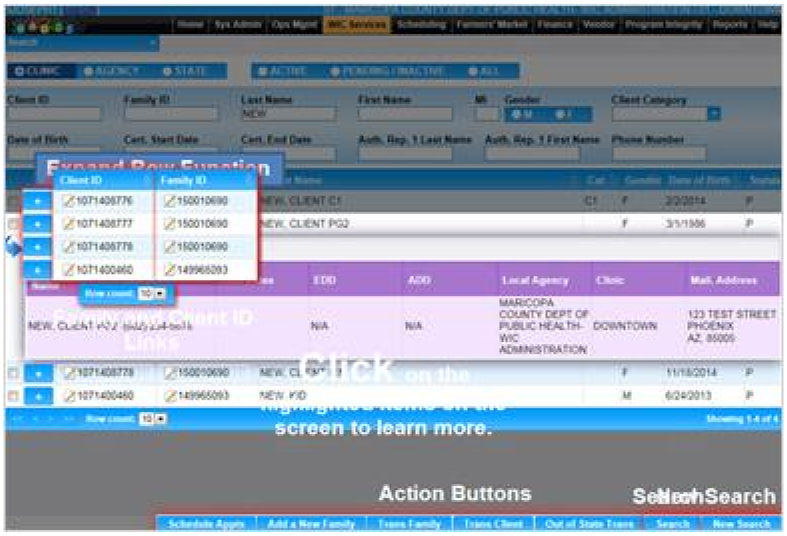


Notes:

Throughout HANDS, you'll see items that that are standardized. This means that they look and work the same no matter where you see them. These items include action buttons, pick lists, formatting, and certain features. They save you time so you can focus on the important things, like connecting with the participant and providing excellent customer service.

Let's take a look at some of these items on HANDS screens. You'll notice several action buttons and features on these screens, but for now, we're going to focus on items that are frequently used.

1.6 STANDARDIZED ITEMS - SEARCH

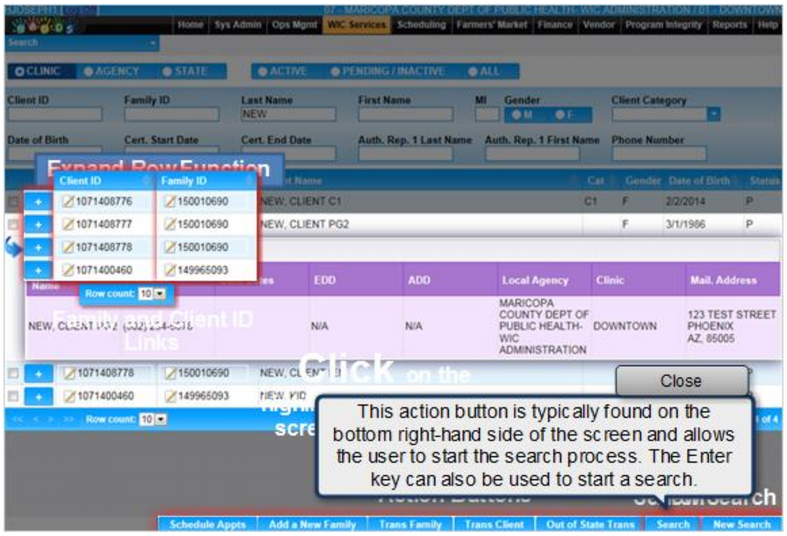


Notes:

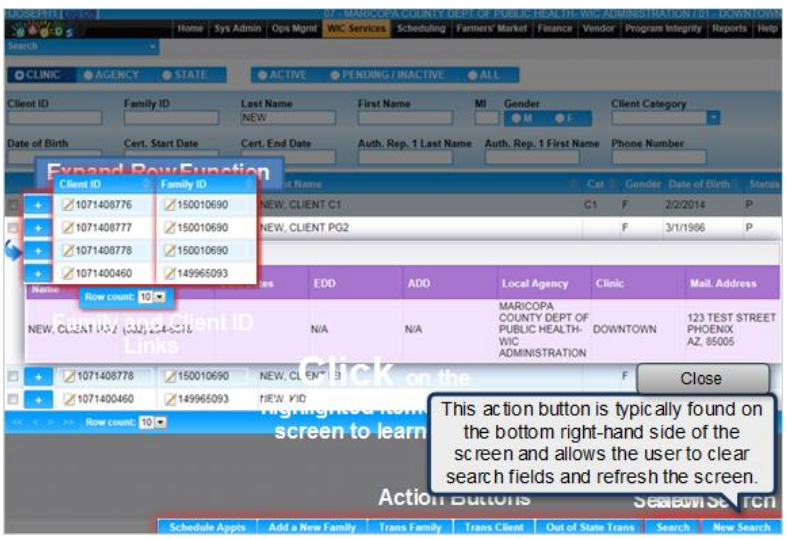
On the Client Family Search page, system action buttons are located in one of two places. They can be found on grids located on the screen, or on the bottom of the screen as we see here on the Search page. Features on the Search page include the Search and New Search buttons, which assist you in finding what you need and the Row Count feature that allows you to customize how many search results are displayed. The Expand Row function displays additional information, and the Family ID and Client ID links allow you to access records to view or edit.

Now that we know a bit about the actions, functions, and features found on the Client Family Search page, let's explore more about the items we've discussed. Click on the highlighted items on the screen to learn more.

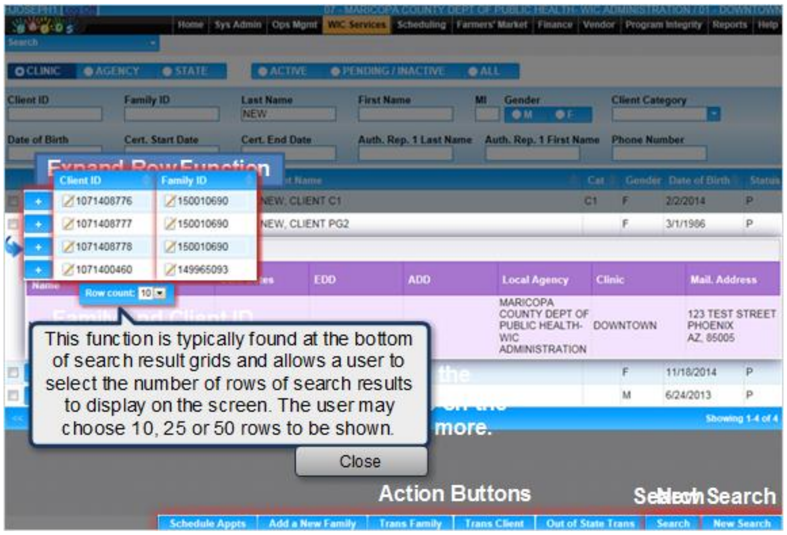
01 (SLIDE LAYER)



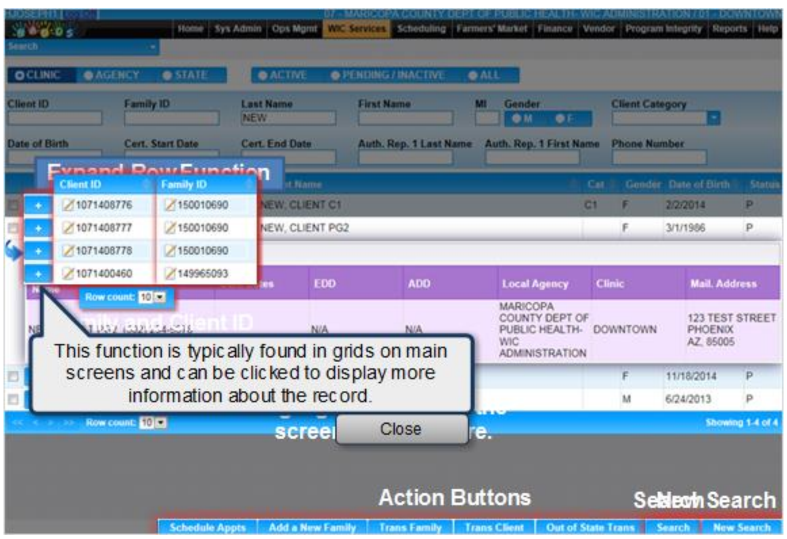
02 (SLIDE LAYER)



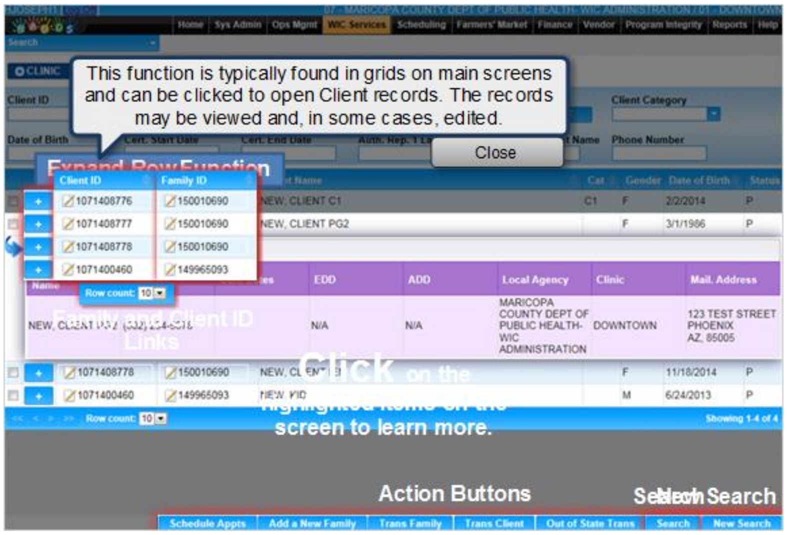
03 (SLIDE LAYER)



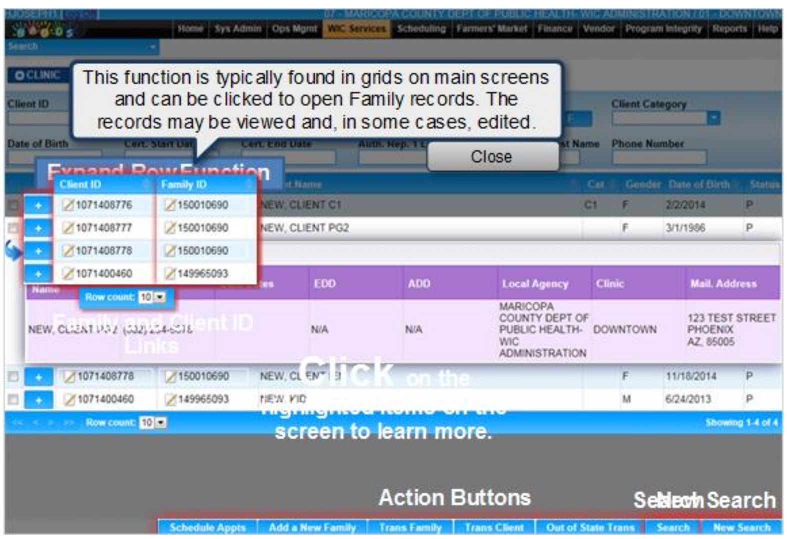
04 (SLIDE LAYER)



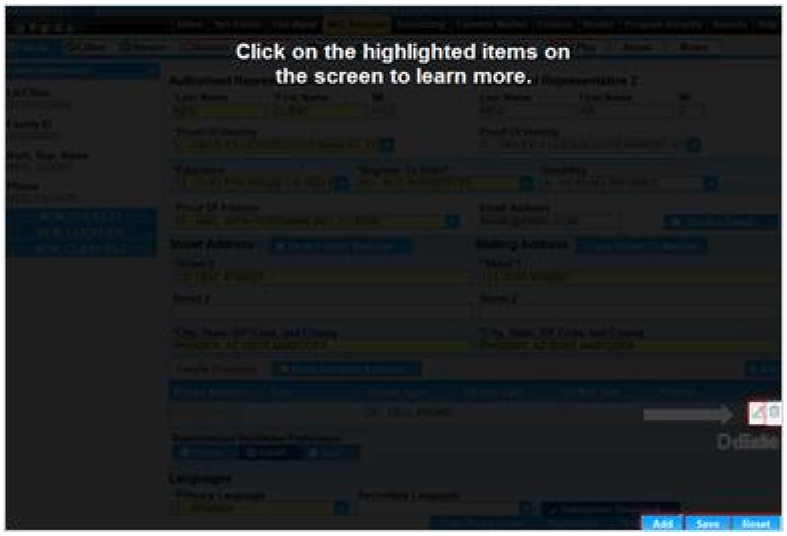
05 (SLIDE LAYER)



06 (SLIDE LAYER)



1.7 STANDARDIZED ITEMS - ACTIONS, FUNCTIONS, AND FEATURES



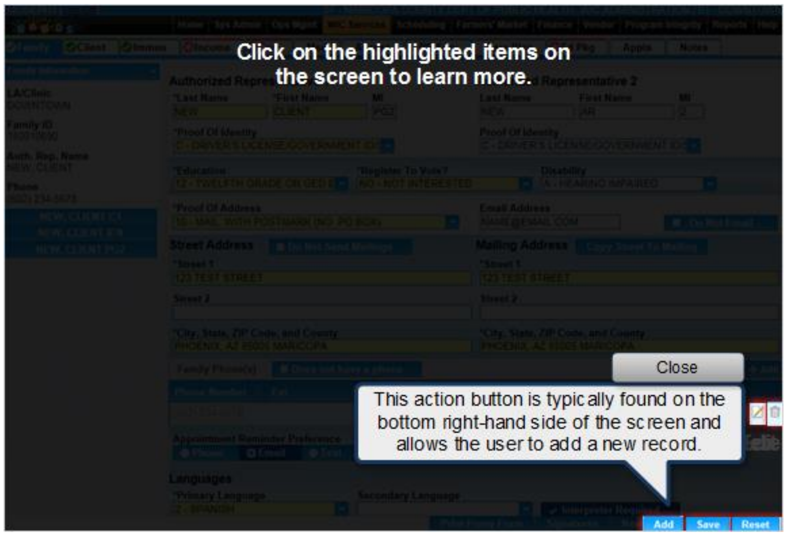
Notes:

Just like the Client Family Search screen, the Client Registration Screen's action buttons are located on the bottom right of the page. These buttons allow you to add new information, save the changes you have made, or reset the page back to the way it was before you made changes.

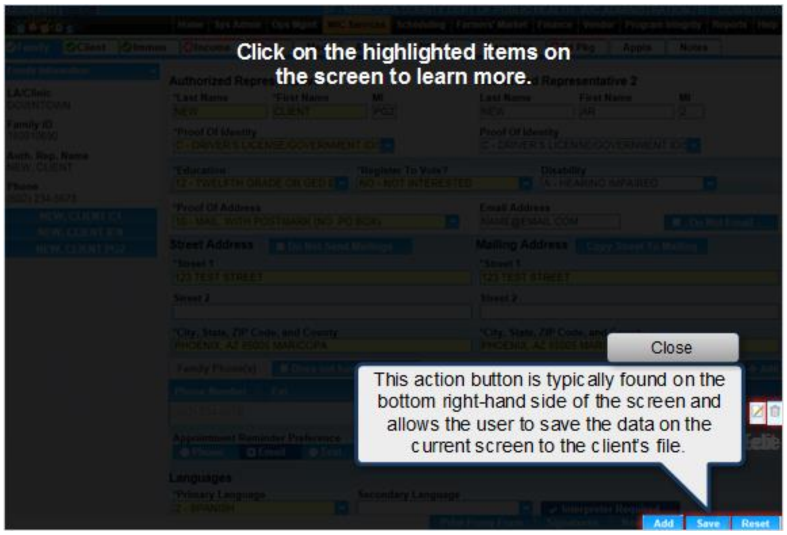
You'll also see icons throughout HANDS that allow you to view, edit and delete records. These icons can be found in the grids on the screen and can be seen here, on the Family Information screen in the Family Phones area.

Now that we know a bit about the actions and features found on the Client Family Search page, let's explore more about the items we've discussed. Click on the highlighted items on the screen to learn more.

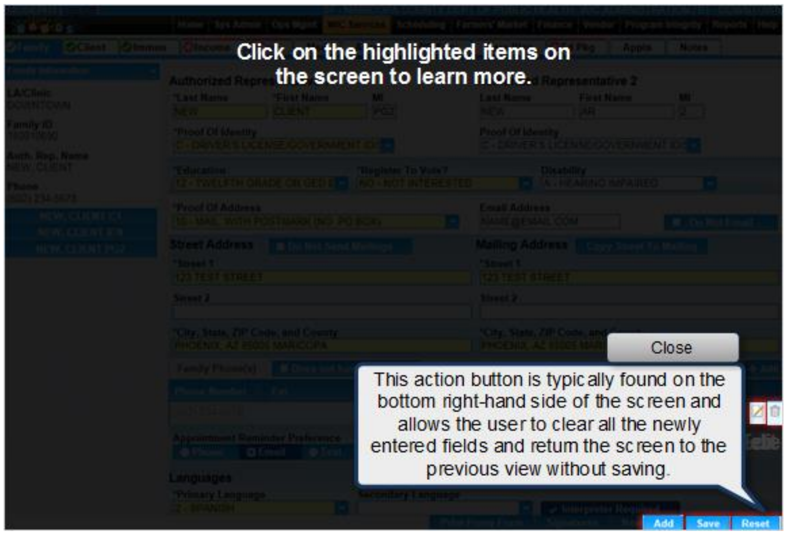
01 (SLIDE LAYER)



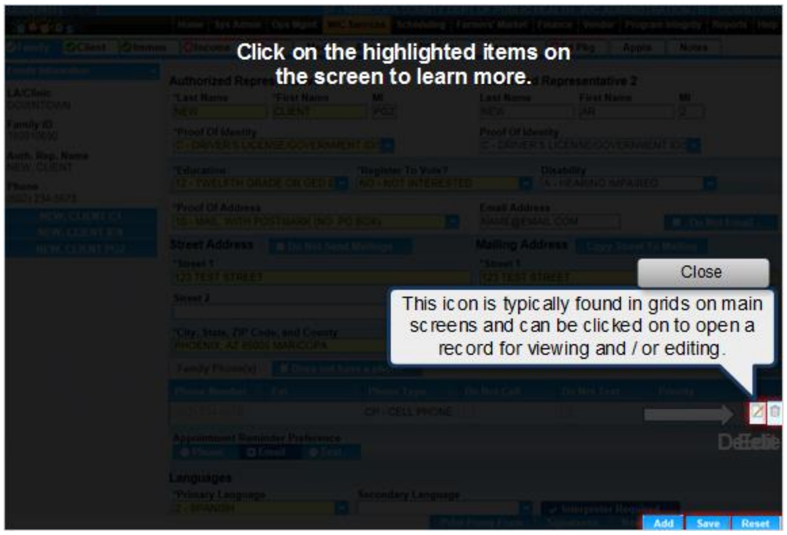
02 (SLIDE LAYER)



03 (SLIDE LAYER)



04 (SLIDE LAYER)



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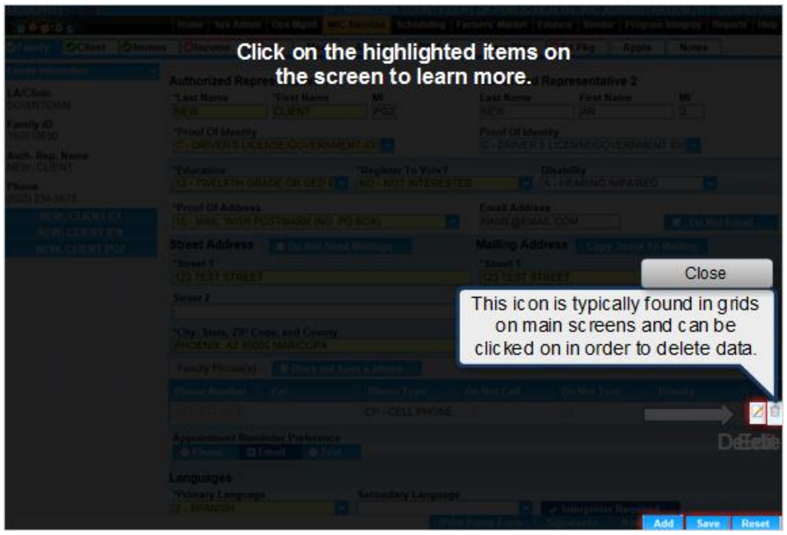
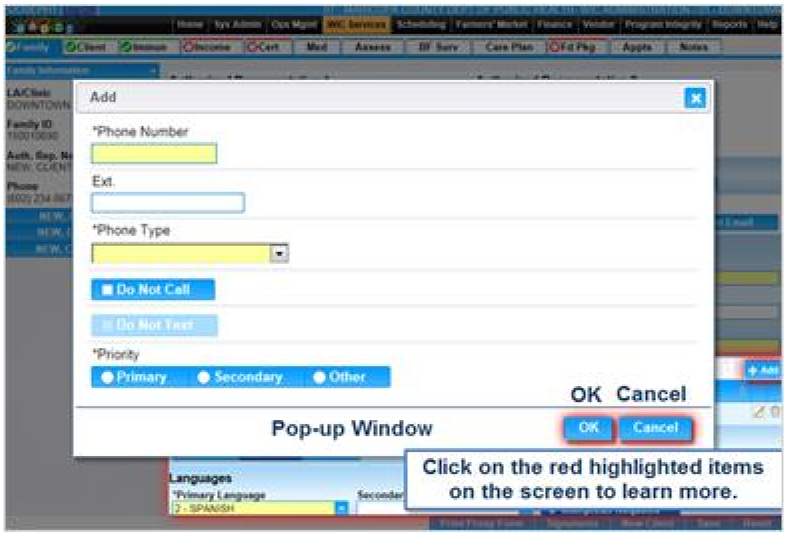


1.8 STANDARDIZED ITEMS - OTHER ACTIONS, FUNCTIONS, AND FEATURES

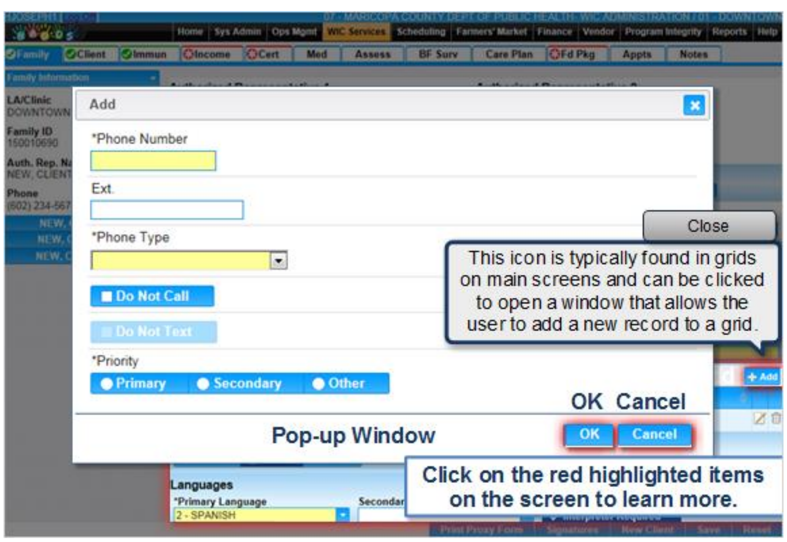


Notes:

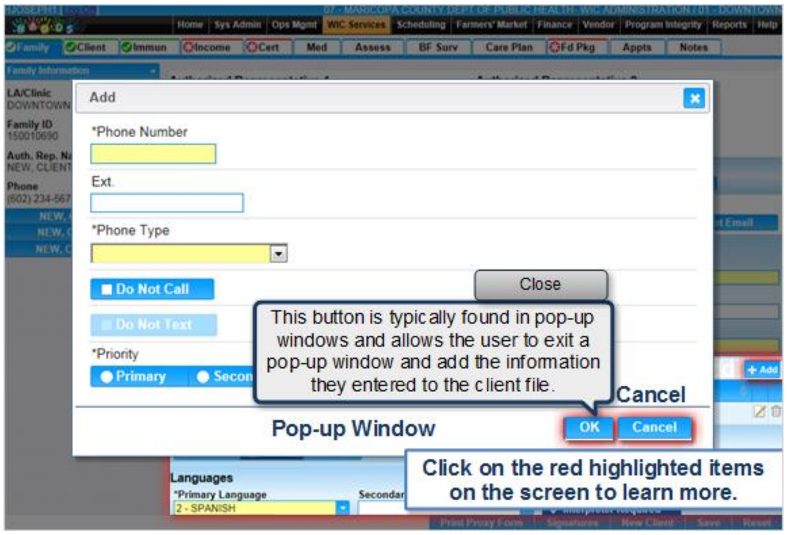
What other kinds of action buttons can you find in HANDS? On the Family Information page, you may notice an Add button with a small plus sign next to it. This button lets you add information to the system. Clicking this button opens a pop-up window which contains more action buttons, including an OK button which saves your work and a Cancel button which allows you to exit without changing any information.

Click on the highlighted items on the screen to learn more.

01 (SLIDE LAYER)



02 (SLIDE LAYER)



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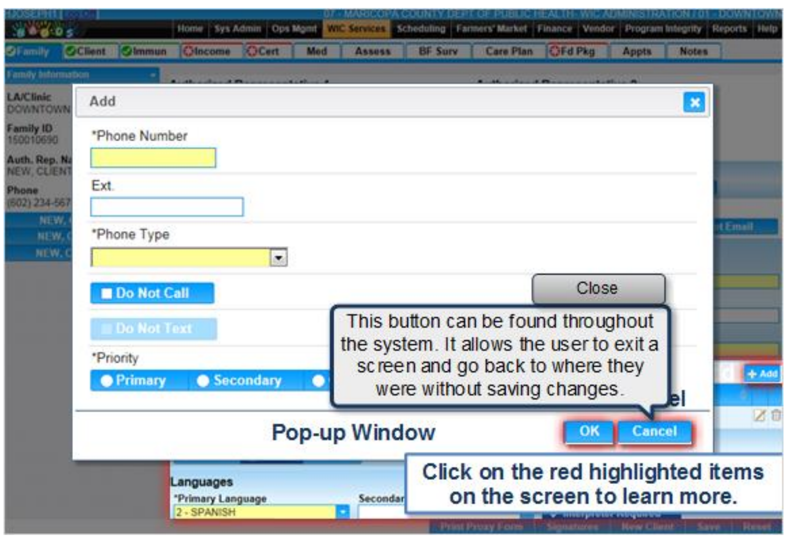
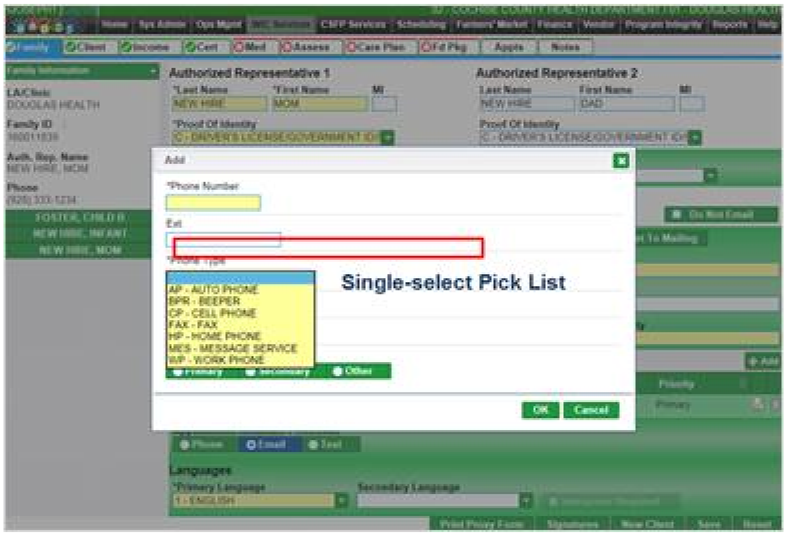


1.9 STANDARDIZED ITEMS - PICK LISTS



Notes:

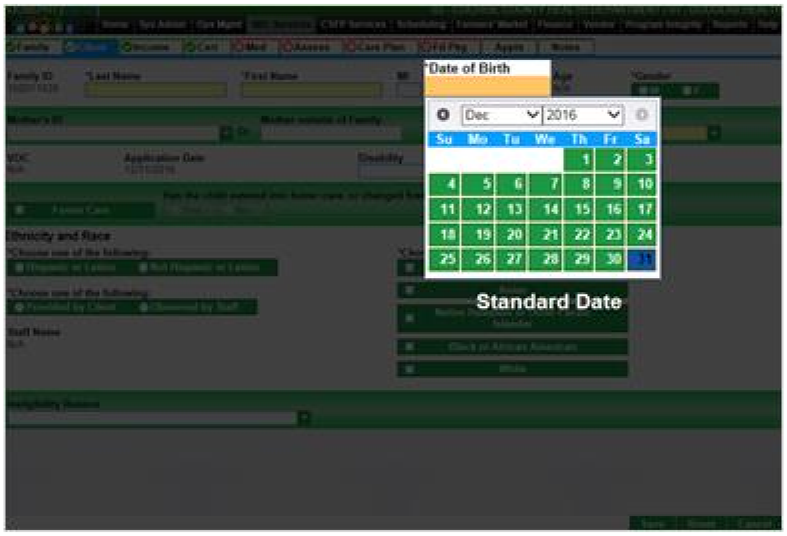
So, what other features will you see in HANDS? Well, when you work in HANDS, there will be times when you have to select items from a drop down list, or pick list. You will encounter three types of pick lists throughout the system.

One pick list allows you to pick multiple items. For this type of pick list, you will need to scroll through the list of items to select what you need.

The second type of pick list allows you to select one item by scrolling or typing directly into the field. The input field will auto-complete, which means it will guess what you're looking for and display the items in the list that match.

The third type of pick list is also allows you to select one item and is usually used for very short lists. You will not be able to type whole words into this list; however, it will let you type in the first letter or number of the item you are looking for.

1.10 STANDARDIZED ITEMS - FORMATTING



Notes:

You will learn more about these specific fields in later module. Another timesaver in HANDS is the similar formatting in the name, phone number, address and date fields.

All names in HANDS are entered and displayed as last name, first name and then middle initial or MI, with the MI field allowing up to three characters.

When you enter phone numbers, you will need to select a phone type, such as cell or home and a priority, like Primary or Secondary. You also have the option to keep the numbers confidential using the Do Not Call and Do Not Text checkboxes.

Addresses are also entered the same throughout the system, and the City, State, and ZIP Code line has an auto-complete feature. You can enter any item on the line; it doesn't have to be the city. You get to choose what works best for you.

When you enter dates, you can type in the date or use a calendar tool to select what you need.

1.11 SELF-CHECK - STANDARDIZED ITEMS

Notes:

On this screen is a self-check of the content covered so far. Select the best answer, and then click 'SUBMIT' to check your answer. The check is ungraded, and you'll receive feedback about your answer.

1.12 SYSTEM MESSAGES

Notes:

Will the system let you know if something is missing or needed to complete the page? Yes! There are different types of system messages that you may encounter in HANDS, including error messages, general information messages, loading messages, and unsaved changes messages.

When you see system messages, think of the Red and Yellow portions as a stoplight. Yellow messages are telling you to slow down. When you see a message highlighted in yellow, something needs to be considered, but may or may not need action.

Messages in red are telling you to stop because something needs your attention. Typically something is missing, or needs to be updated.

Sometimes these messages disappear; however, if you need to see them again, you can save or reset the page.

Let’s take a look at the different types of messages you may see when using HANDS.

1.13 SYSTEM MESSAGES - ERROR MESSAGES

Notes:

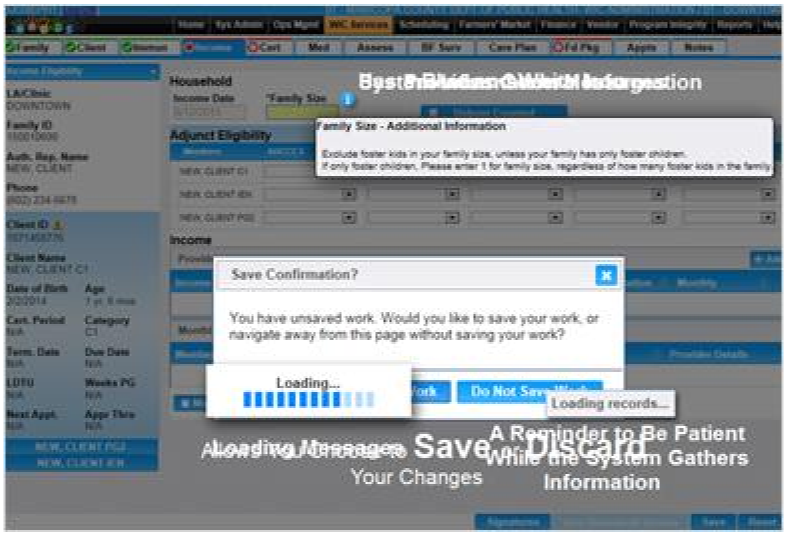
From time to time you might get an error message. The error messages in HANDS are straightforward and help you determine issues quickly and resolve them without much downtime. They may appear on main screens or as pop-up windows.

These messages will tell you if something needs to be updated, if you missed any fields on the screen, or if something is happening within the system.

Messages that indicate information needs to be entered or updated will be displayed on the top of the screen or in pop-up windows. If mandatory fields are not entered, those may be highlighted in red to further assist you.

The other type of error messages, called Stack Trace errors, indicate a failure occurring within the system. When you see a Stack Trace error, you should write down the error number and call the Help Desk.

1.14 SYSTEM MESSAGES - OTHER SYSTEM MESSAGES

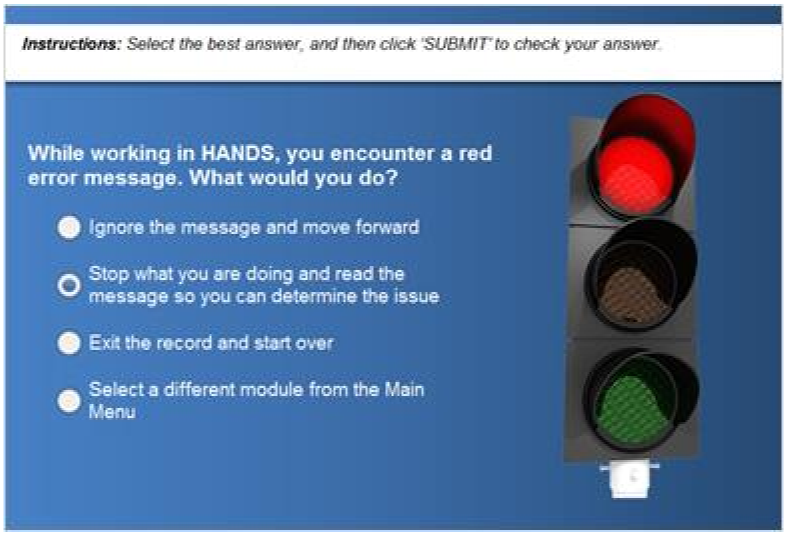


Notes:

Another type of message is the system information message, which has a blue and white "I" icon next to it. This type of message can appear and fade on the top of the screen, display in a pop-up, or might appear on the main page in conjunction with a hover feature to provide additional information. System information messages are intended to be helpful and provide general information regarding the screen you are on or the data you are working with.

A system information message will appear if you have unsaved work on your computer and prompt you to save your work. This way you'll never be in danger of losing any data you have entered in HANDS.
The system will also let you know if data is loading by sending you a system information message on the main screen, or in the grids on the page. These messages are a reminder to be patient while the system gathers the information needed.

1.15 SELF-CHECK - SYSTEM MESSAGES



1.16 LOGIN PAGE

Notes:

So now that you know what the screens and messages look like, it's time to login to the system!
What makes the HANDS Login page special? It represents the community, collaboration, and spirit of the HANDS project.

The handprints that make up the HANDS logo come from the infants that were breastfed in the Arizona State office during the planning stages of the project.

Each flag on the left of the screen represents an agency on the team that made the project possible.
When you use the screen, you will notice that there are two parts to logging in. First, you will enter your username and password.

Next, you will select your Local Agency and Clinic. After that, you will be taken to the Home page where you can begin using the system.

1.17 HOME PAGE

Notes:

After you have logged onto the system, you'll be taken to the Home page. You will use this page to navigate through HANDS and to check for any important information or updates, such as alerts about changes to policy, tips for using the system, and training resources.

The Home page in HANDS has many features to help all WIC program users while some features are specific to individual State Agencies. Let's take a look at some of these features.

At the very top of the Home screen you'll find your login information and the Log Off link. This will remind you which username you used to access HANDS and what Agency and Clinic you are currently logged in to. You can also use the Agency and Clinic link to log into a different location.

Below this, you'll find the Main Menu. The items in the Main Menu are used to navigate to the different modules within HANDS.

Next you'll see the Training Menu, which contains essential training resources and helpful tools.

1.18 HOME PAGE, CONTINUED

Notes:

Let's move to the main portion of the Home page which contains the Landing area and the Service Desk Menu.

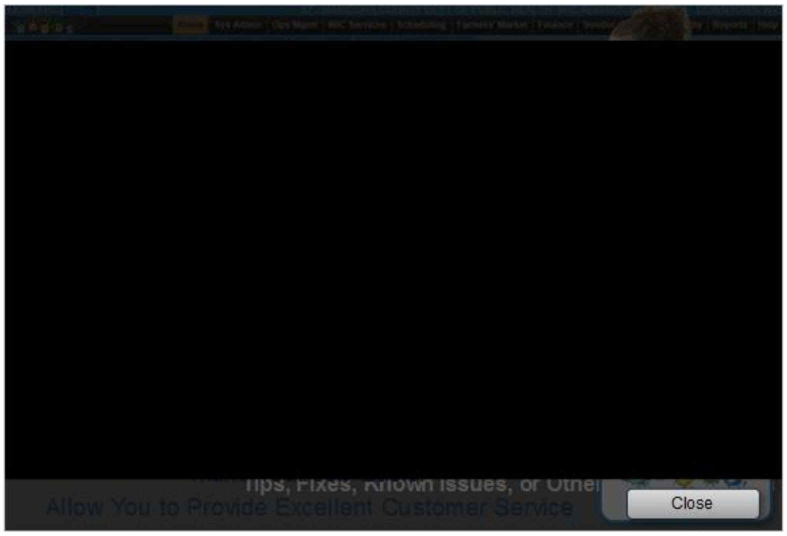
The Landing area is what you see after you login to HANDS. Everyone in each State Agency sees the same info, which may contain pictures, quotes, or policy and system alerts.

The Service Desk Menu contains many helpful resources and links to assist you with HANDS, including tips for using the system, fixes, known issues, or other vital information.

Make sure you explore the Home page in HANDS so that you're comfortable with everything it has to offer. Checking the Home page before you start your day will ensure that you have all of the most current information. This will not only make your job easier, it will allow you to provide excellent customer service to your clients.

To view an example of how this would look if you were using HANDS, click the 'Example' button on screen.

VIDEO EXAMPLE (SLIDE LAYER)

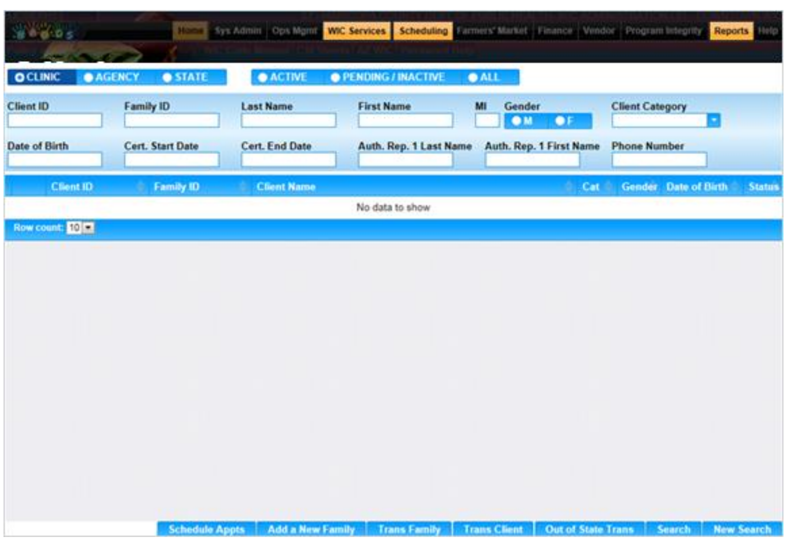


1.19 NAVIGATION - MAIN MENU

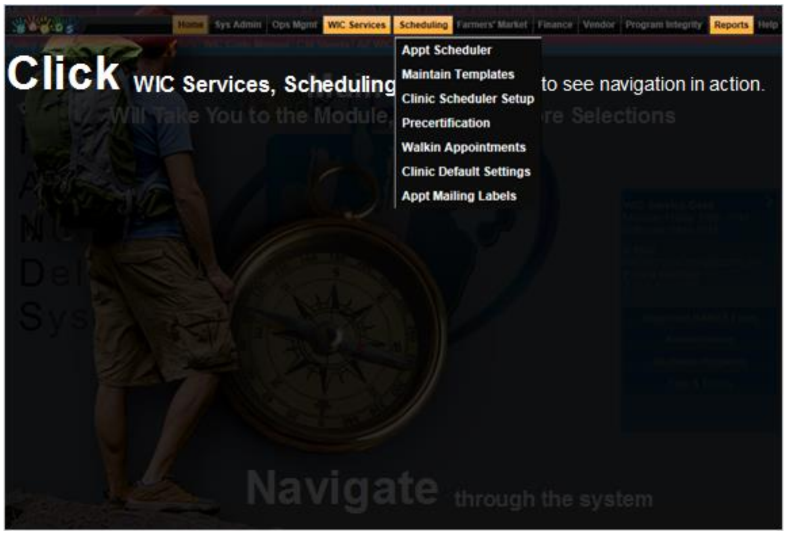
Notes:

Now that you've logged in and are familiar with the Home page, it's time to navigate through the system. There are several ways to get around HANDS; however, you need to select an area to work in first.
After logging into the system, you see a row of menu options across the top of the screen. This is the Main Menu, the items you see in the Main Menu may be different, based on your job duties.
Each menu item represents a section, or module, you may use to complete services in HANDS. The modules you will most likely access will be WIC Services, Scheduling, and Reports. Clicking on these menu options will either take you to the module, or provide you with more selections.
Click on WIC Services, Scheduling, and Reports in the Main Menu to see navigation in action.

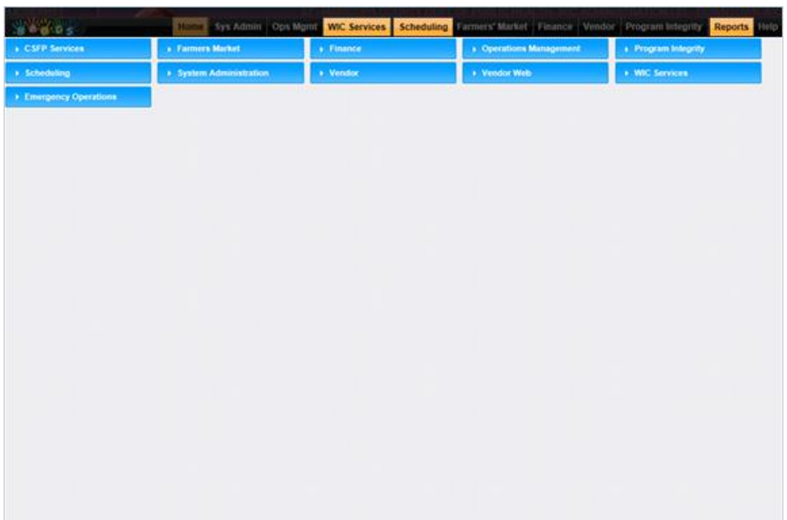
01 (SLIDE LAYER)



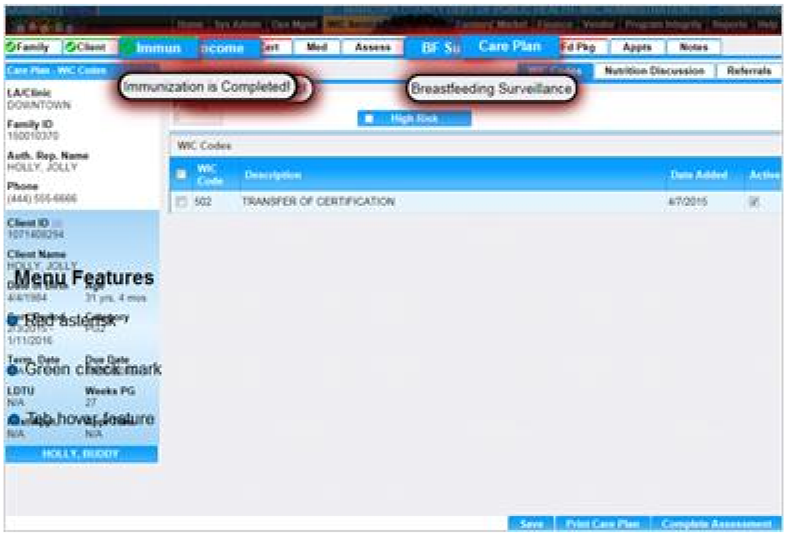
02 (SLIDE LAYER)



03 (SLIDE LAYER)



1.20 NAVIGATION - CERTIFICATION FLOW MENU



Notes:

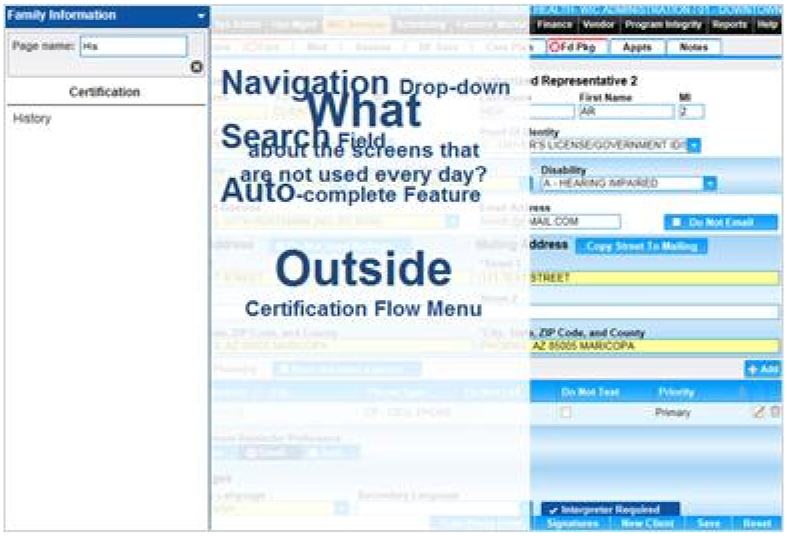
Once you are in the WIC Services module and have selected a client, you'll see the Certification Flow Menu. This menu consists of the screens that are most commonly used to assist participants. On this page, we're discussing navigation. We'll need to go into greater detail on some things later in the course.

Each screen or group of screens will display when you click the tab belonging to that screen or group. For example, if you select the Care Plan tab, all the screens associated with that tab will display.

This menu has several features to help you along the way. A red asterisk icon lets you know that more work needs to be done in an area while a green checkmark lets you know an area has had work entered and saved.

Another helpful item is the hover feature for the menu tabs. Several of the tabs are abbreviated to save space. If you are unsure about either the icon or the abbreviation of the tab, you can use the hover feature to learn more.

1.21 NAVIGATION - ACTIVE RECORD



Notes:

What about the screens that are not used every day? Sometimes, you will need to view a screen outside of the Certification Flow menu while you are working with a client's record.

To navigate to another screen simply use the navigation drop-down menu in the Active Record area, which can be found on the left side of your screen.

You can use this drop down menu to access the screen you want by scrolling or using the search field. The search field has an auto-complete feature, which allows you to type in part of the screen name to display results. We will learn more about the rest of the Active Record later on.

1.22 NAVIGATION - CLIENT FAMILY SEARCH

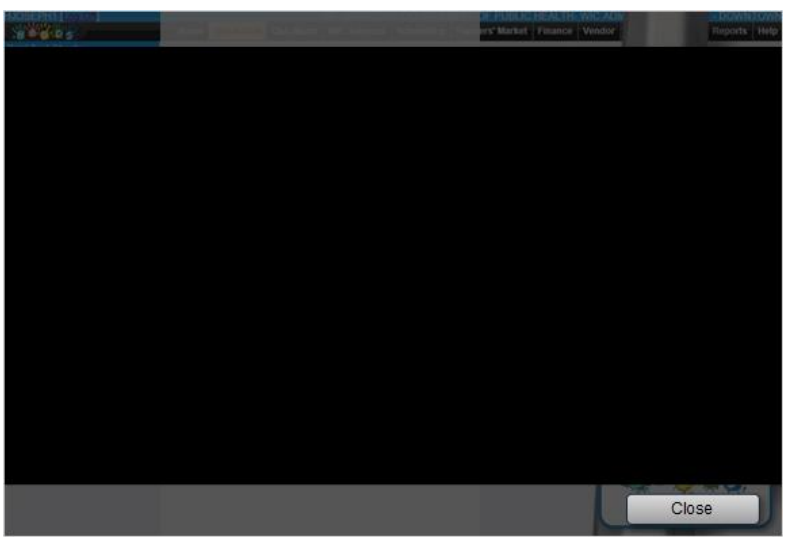
Notes:

Another way you'll navigate in HANDS is by using the navigation drop-down menu on the Client Family Search page which works similarly to the drop down menu in the Active Record. It allows you to locate the screen you want by scrolling or using the search field and has an auto-complete feature.

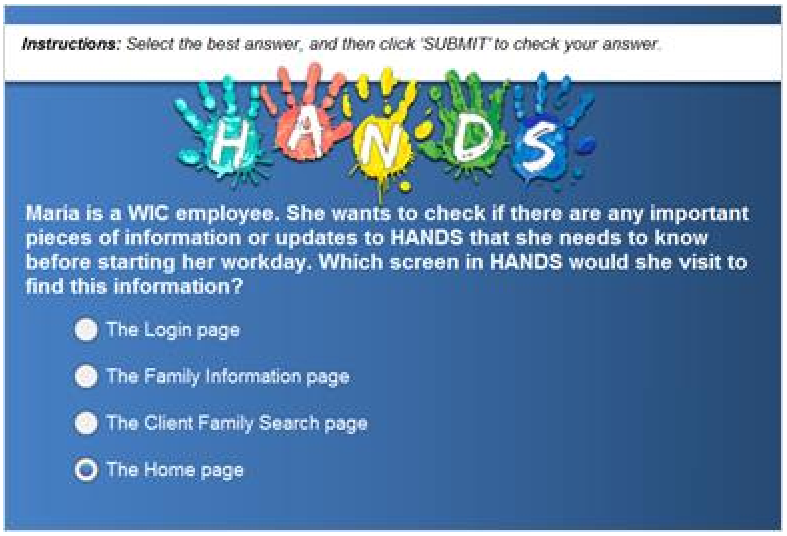
The purpose of this menu is to navigate to screens for more advanced users, screens used for administrative tasks, or those screens that don't use client records.

To view an example of how this would look if you were using HANDS, click the 'Example' button on screen.

VIDEO EXAMPLE (SLIDE LAYER)



1.23 SELF-CHECK - HANDS INFORMATION



1.24 SUMMARY

Notes:

In this module, you learned that HANDS is a tool that assists you in enrolling clients into the WIC program, documenting the services you provide, and issuing benefits, while you connect with each participant.

We found out about the actions and features that are consistent throughout the system. You know how HANDS communicates and how to get around the system. You also understand how to use the Login and Home screens.

In the next module, we'll cover intake, which includes searching for participants and adding records to HANDS.

MODULE 2 - INTAKE

2.1 INTAKE

Notes:

Now that you've learned about HANDS basics, it's time to learn about the screens you will need to serve clients.

In this module, you'll learn about the intake portion of a certification.

You'll learn about searching for clients using the Client Family Search screen. Intake consists of searching for, collecting, and documenting family and client information.

You'll also learn about entering family and client information using the Family Information, Client Registration, and the Immunization screens.

In addition, I'll teach you about the valuable information and tools found in the Active Record area.

We'll also look at the importance of quality interactions with your clients and using HANDS as a tool during an appointment instead of letting the system take all of your attention.

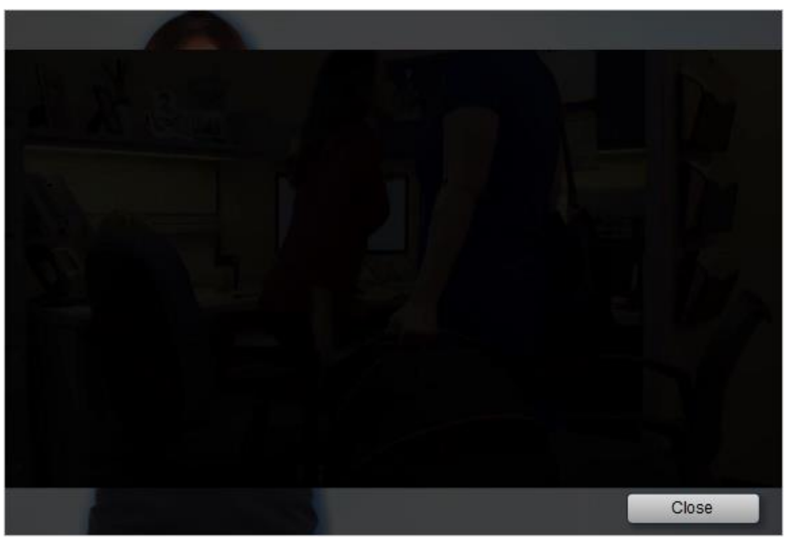
Throughout the course, you'll see an icon called the Together We Can icon, which will remind you to focus on the needs of the client. The Together We Can icon will be followed by either a Policy or a Participant Centered Services (PCS) tip. These tips will help you use HANDS to best serve the client.

2.2 VIDEO SCENARIO 1 - HOW WOULD YOU WANT TO BE TREATED?

Notes:

Watch the video of our WIC staff member, Lorena, as she starts the intake process with a brand new WIC client, and then answer the questions on the next screen.

VIDEO (SLIDE LAYER)



2.3 WHAT DO YOU THINK? – VIDEO 1

Notes:

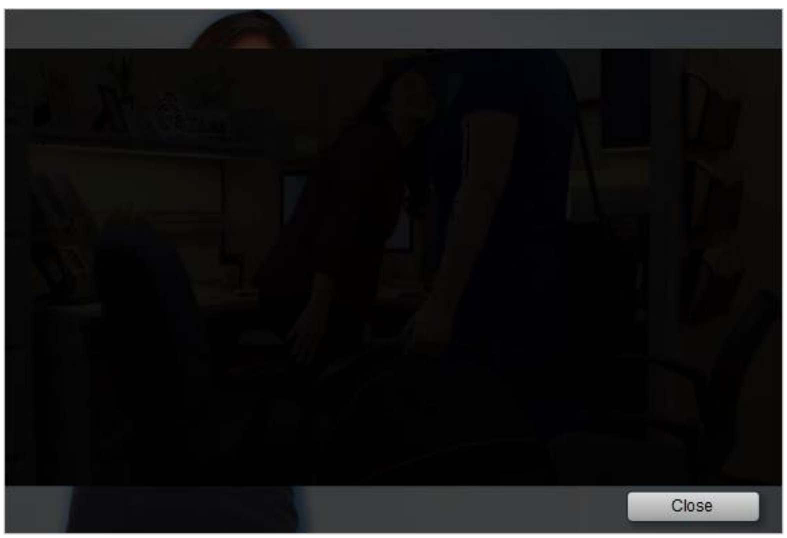
Based on the information in the video you just watched, what services do you think will be offered during the appointment? What tone has the staff member set for the visit? What would you do differently?

2.4 VIDEO SCENARIO 2 - HOW WOULD YOU WANT TO BE TREATED?

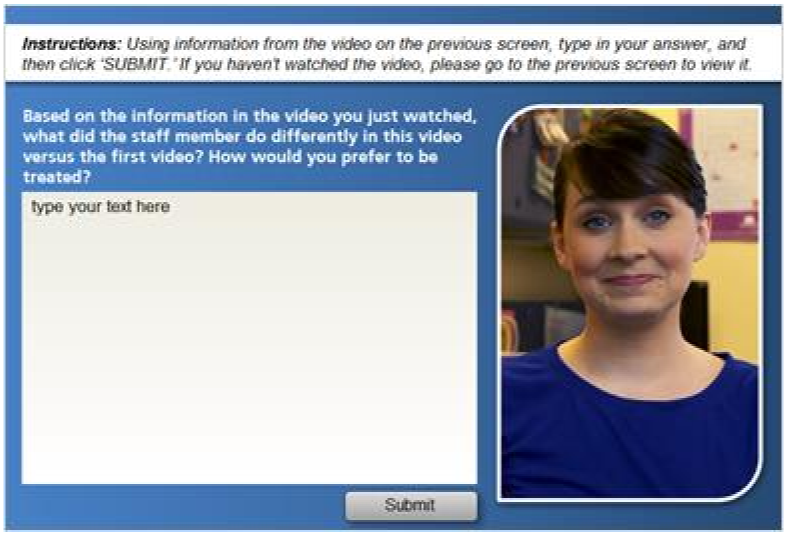
Notes:

Now watch another video of our WIC staff member, Lorena, taking a different approach to the intake process, and then answer the questions on the next screen.

VIDEO EXAMPLE (SLIDE LAYER)



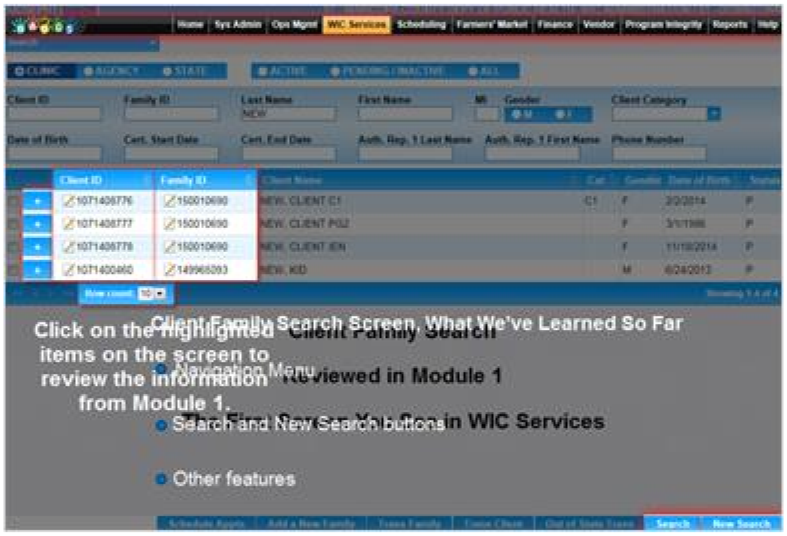
2.5 WHAT DO YOU THINK? – VIDEO 2



Notes:

Based on the information in the video you just watched, what did the staff member do differently in this video versus the first video? How would you prefer to be treated?

2.6 CLIENT FAMILY SEARCH



Notes:

One of the screens that you'll spend a lot of time using is the Client Family Search screen. We started reviewing this screen in Module 1.

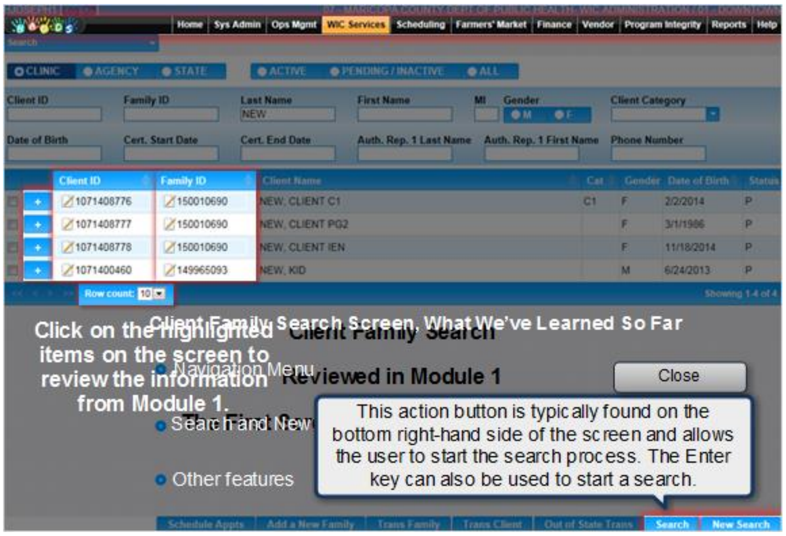
The Client Family Search screen is the first screen you will see after you select the WIC Services module.

We learned about the navigation menu, the Search and New Search buttons, and some of the other features of the screen.

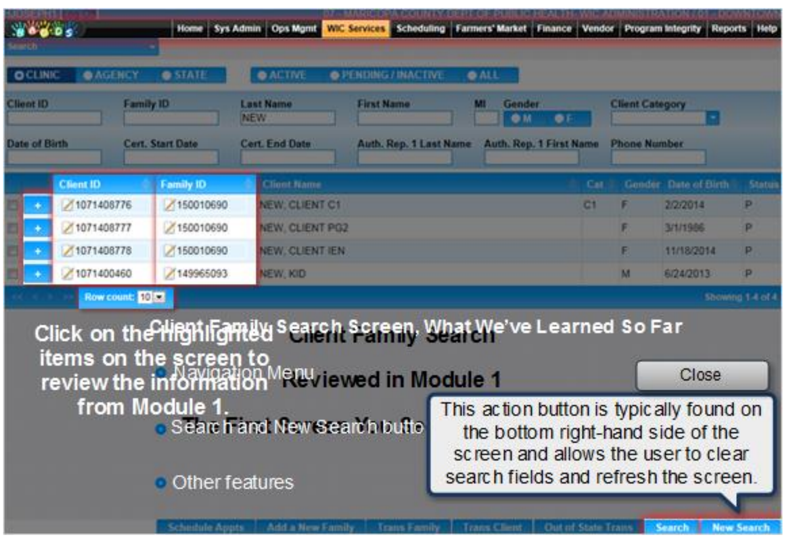
Click on the highlighted items on the screen to review the information from Module 1.

Now it's time to learn how to use the screen to start the certification process.

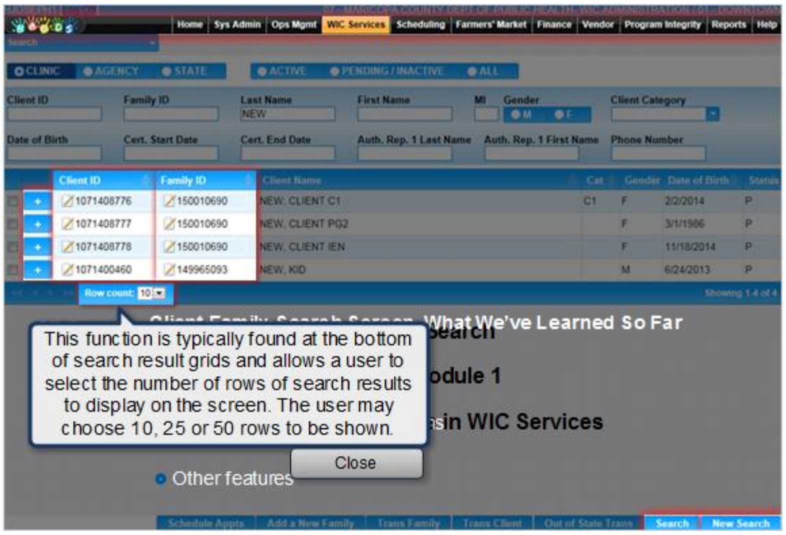
01 (SLIDE LAYER)



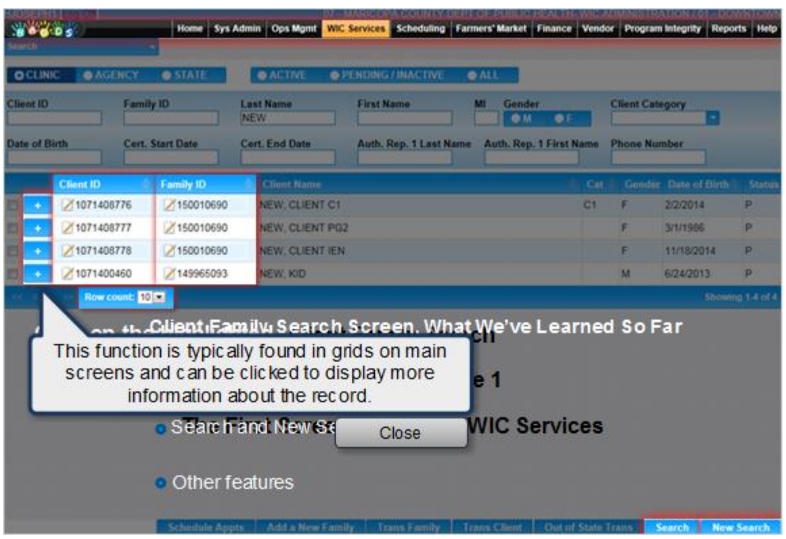
02 (SLIDE LAYER)



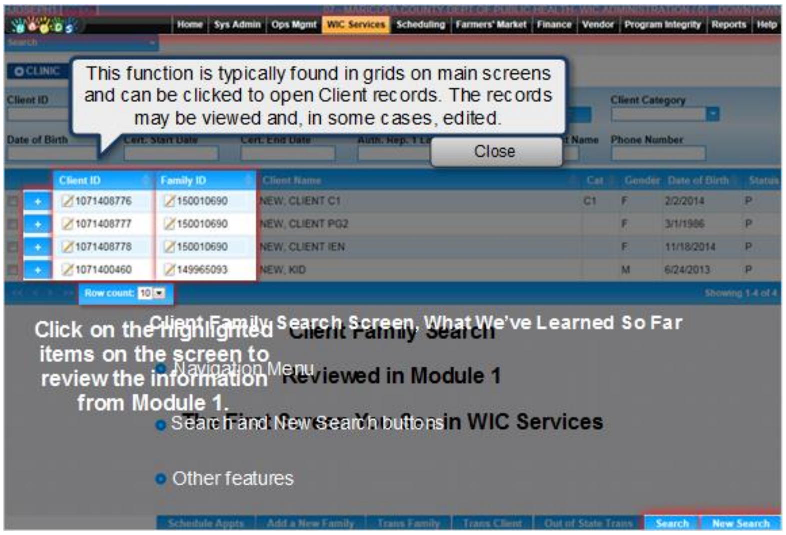
03 (SLIDE LAYER)



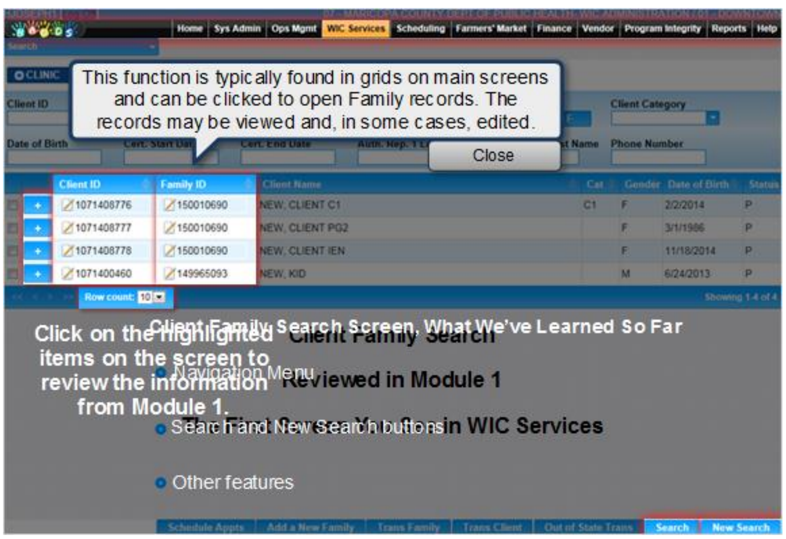
04 (SLIDE LAYER)



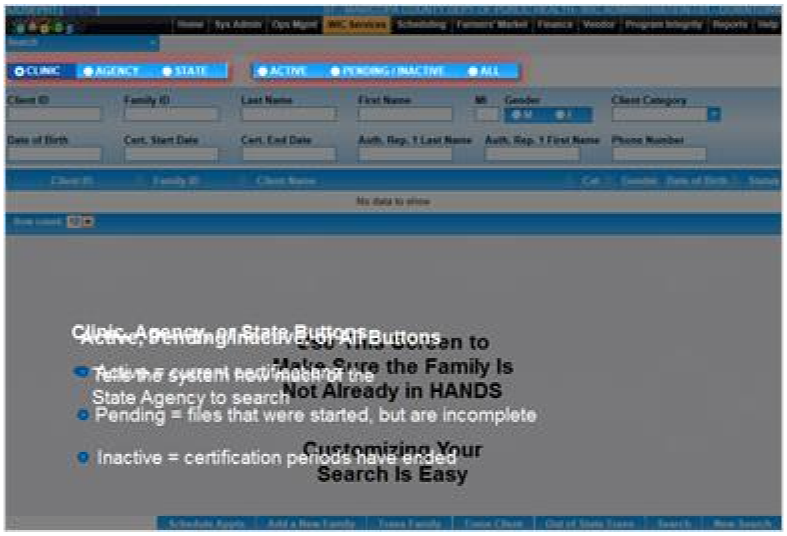
05 (SLIDE LAYER)



06 (SLIDE LAYER)



2.7 CLIENT FAMILY SEARCH - SEARCH FIELDS AND RESULTS



Notes:

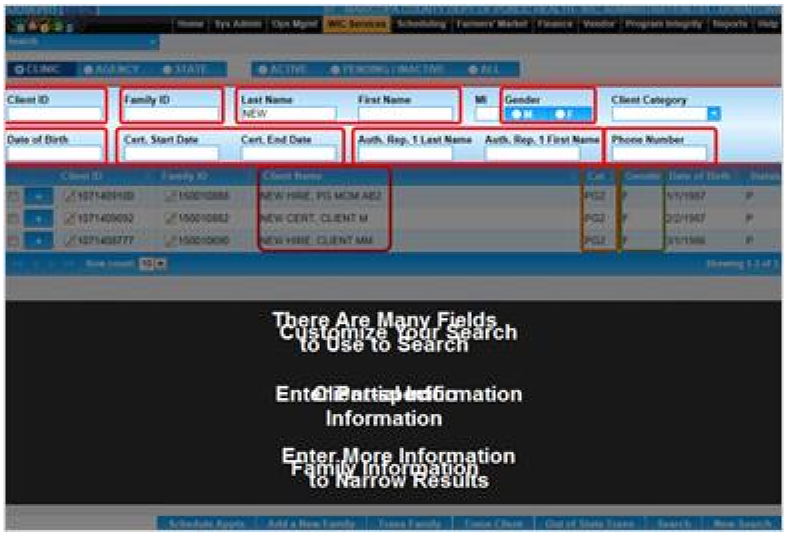
There are many uses for this screen; however, when you are enrolling a new family, you'll use this screen to make sure that the family is not already in HANDS. This saves time and avoids creating duplicate families and clients in HANDS.

The Client Family Search screen has many features that make customizing your search easy.

These include the Clinic, Agency, or State buttons, which tell the system how much of the State Agency you want to search.

There is also the set of Active, Pending/Inactive, or All buttons, which helps with searching for types of certifications. Active participants have current certifications, Pending clients have certification files that were started, but are incomplete, and Inactive clients' certification periods have ended.

2.8 CLIENT FAMILY SEARCH - SEARCH FIELDS AND RESULTS, CONTINUED



Notes:

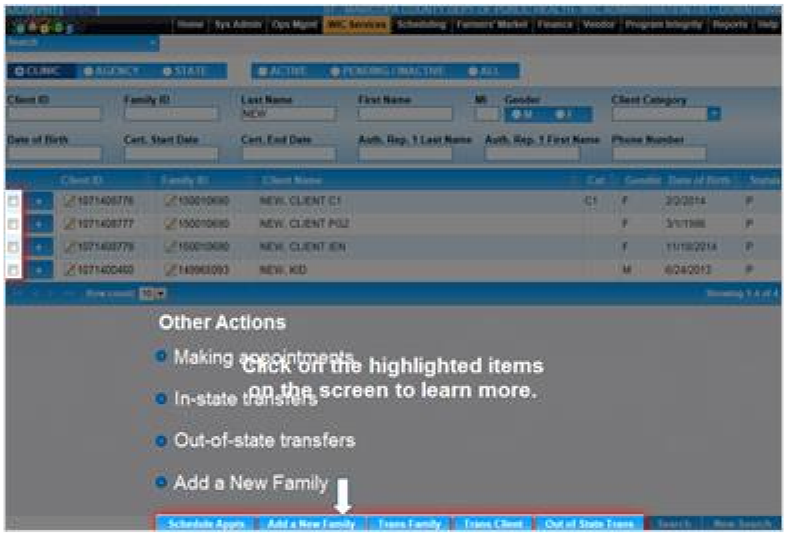
There are many fields you can use to search for clients using the search screen. You can enter client-specific information such as their name, ID number, Date of Birth, Gender, and Certification Dates.

You can also choose to enter family information like the name of the person who acts on the family's behalf, or the Authorized Representative, the Family ID, and the family's phone number.

HANDS makes it easy to customize your search. You can enter partial search info, such as part of a name or Client ID number, and the search results will show you everything with the info you entered.

You can enter information in as many search fields as you would like in order to help narrow down the results.

2.9 CLIENT FAMILY SEARCH - OTHER ACTIONS



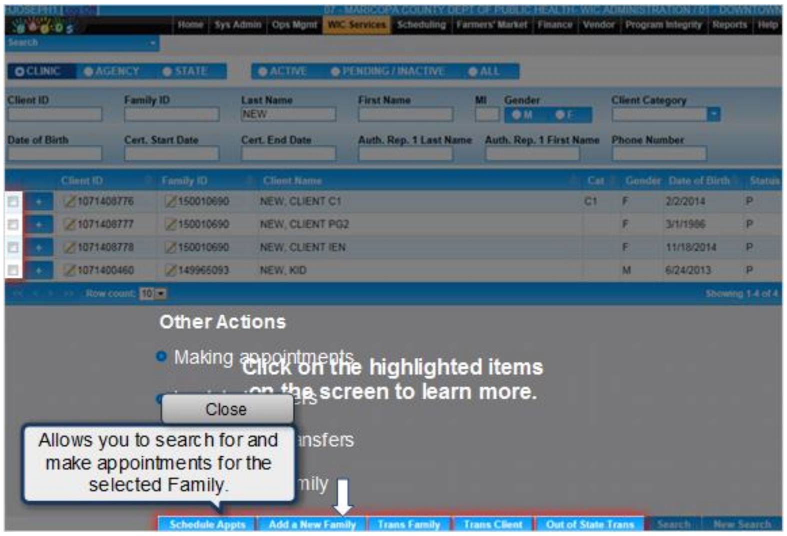
Notes:

Other actions can be performed on the search screen. Some of these are completed using the checkboxes on the far left of the search results grid, such as making appointments and performing in and out of state transfers. We'll cover these functions more in-depth in future modules.

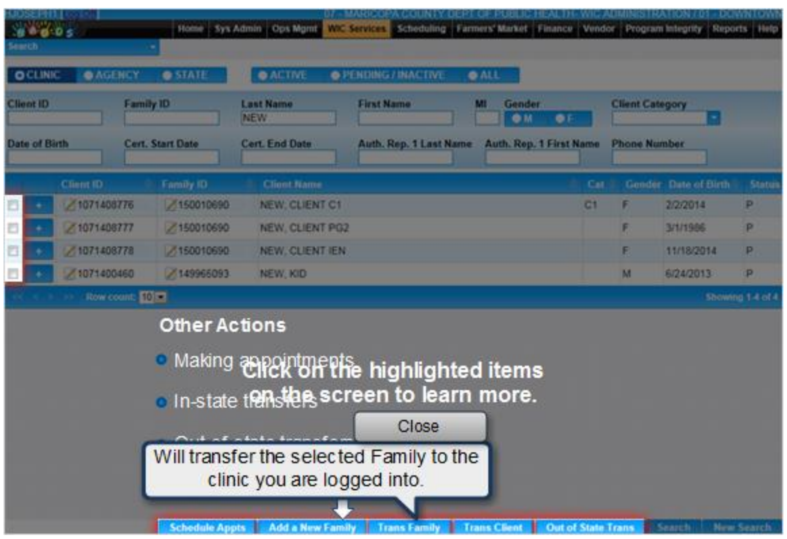
The Client Family Search screen is also where you will start the process of adding a new Family to HANDS.

Click on the highlighted items on the screen to learn more.

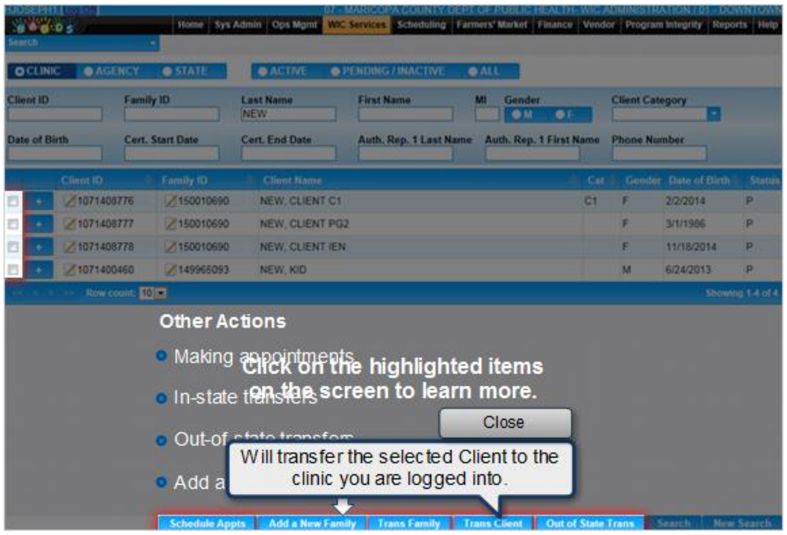
01 (SLIDE LAYER)



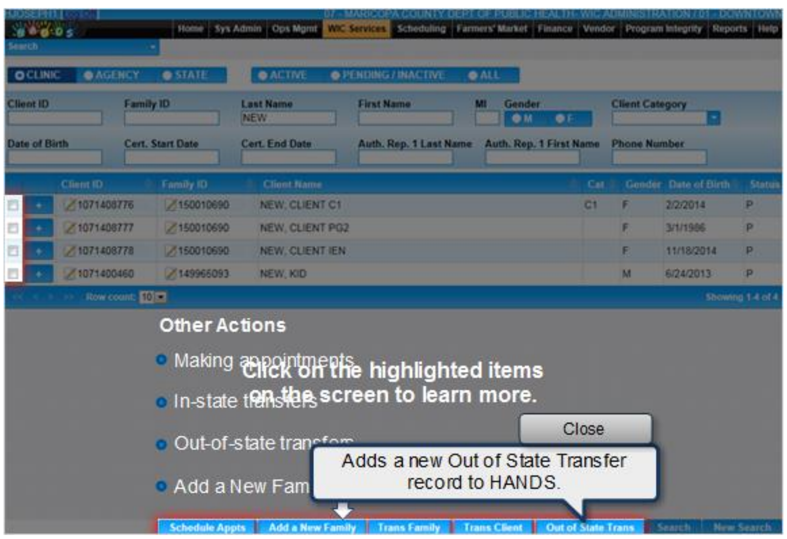
02 (SLIDE LAYER)



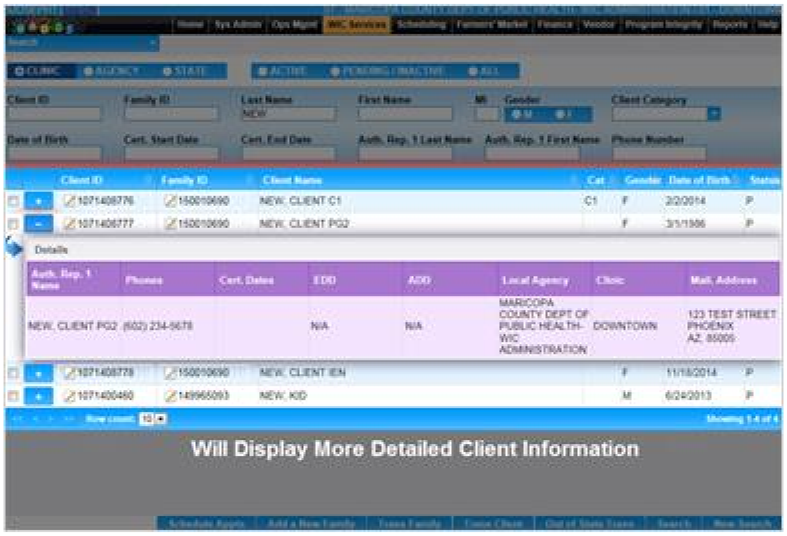
03 (SLIDE LAYER)



04 (SLIDE LAYER)



2.10 CLIENT FAMILY SEARCH - CLIENT AT A GLANCE



Notes:

Viewing the Client at a Glance area helps if you're not sure whether or not the client displayed in the results is the exact client you are searching for.

Using the blue plus icon next to the client's ID will open the Client at a Glance area. This area will display more detailed client information and help you find the client you need.

2.11 CLIENT FAMILY SEARCH - SUBSEQUENT CERTIFICATIONS AND UPDATES

Notes:

Use the Client Family Search screen to find a client's record when their record needs to be updated or when they need a subsequent certification.

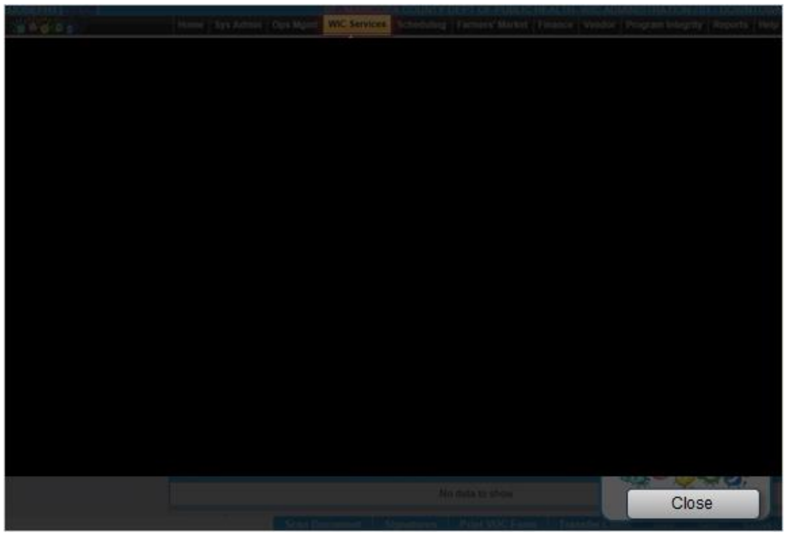
Use the fields on the screen to search for their record in HANDS. Once the search results have displayed, you can view either the family or client record by clicking on the ID number.

Clicking on Family ID will take you to the Family Information screen, and selecting the Client ID will navigate you to the Client Information screen.

If you wish to go back to Client Family Search, you can either click on the WIC Services menu option, or use the navigation drop-down in Active Record.

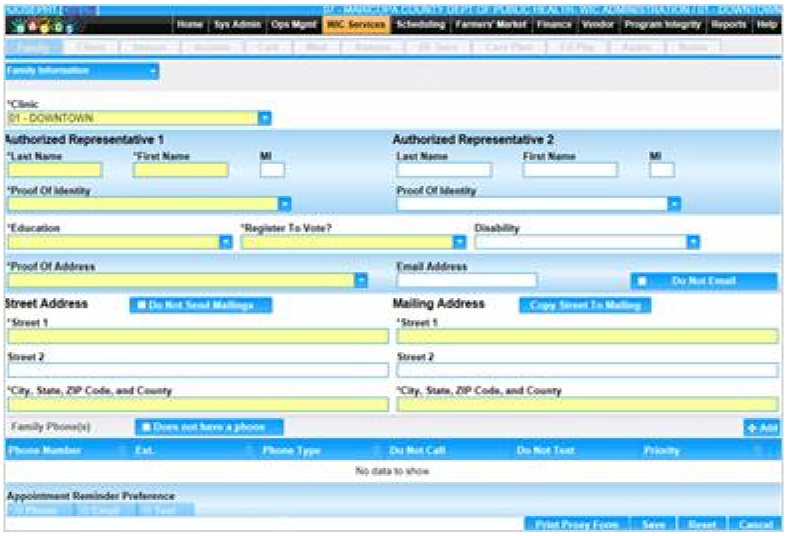
To view an example of how this would look if you were using HANDS, click the 'Example' button on screen.

VIDEO EXAMPLE (SLIDE LAYER)



2.12 SELF-CHECK - CLIENT FAMILY SEARCH

2.13 FAMILY INFORMATION - ADD



Notes:

Now that you're familiar with the Client Family Search process, let's start the certification process.

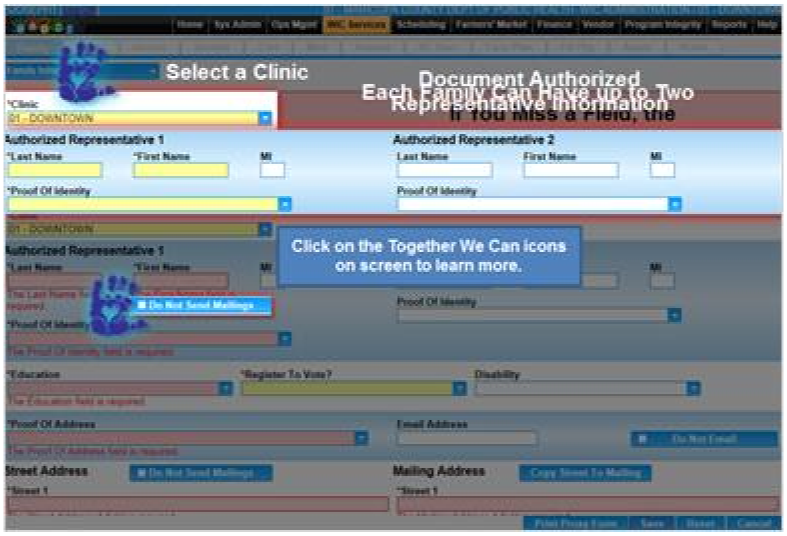
As you saw in the video, setting a friendly, welcoming tone for the appointment is very important. HANDS is a great tool for documentation, but your connection with the client is what helps provide effective nutrition education and ensures the WIC program is successful.

So, let's get started!

There are two ways to add a new family in HANDS using the Client Family Search screen. You can select either the Add a New Family button or Family Information under Enrollment from the navigation menu.

Once you make a selection, you will see the Family Information screen.

2.14 FAMILY INFORMATION - INTRODUCTION



Notes:

The Family Information screen is used to enter basic information about your client's family. Most of the required fields are highlighted in yellow and have asterisks next to them.

Like many of the screens in HANDS, if you miss a field, the system will let you know. Some fields are not required by HANDS, but are required by your Agency, so make sure you are familiar with your Agency's policies and procedures.

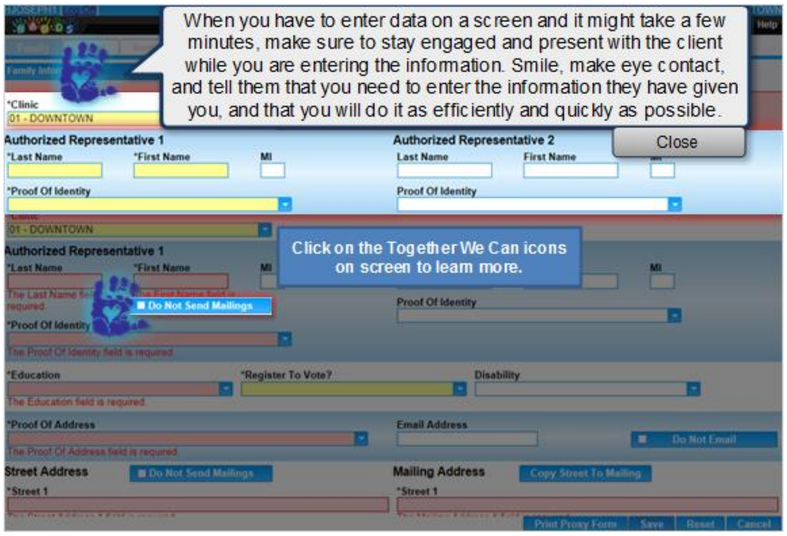
When you add a new family, you'll need to select a clinic in which to enroll them. HANDS will automatically select the clinic you have logged into, but you can change this to a different clinic in your Local Agency if needed.

You'll also need to document information about the family's Authorized Representatives. Authorized Reps are the people who have the authority to sign documents for the family, are responsible for following WIC regulations, and can pick up and redeem food benefits.

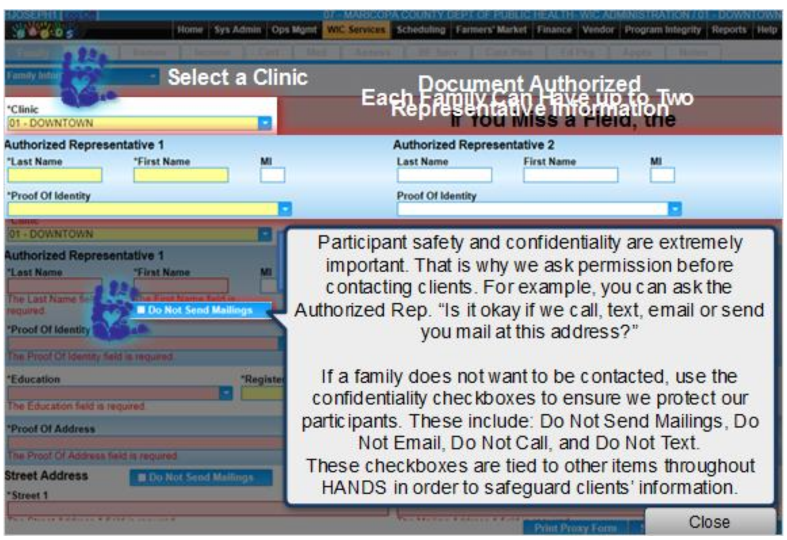
Each family can have up to two Authorized Representatives. You'll need to document at least one Authorized Rep for the family.

Click on the Together We Can icons on screen to learn more.

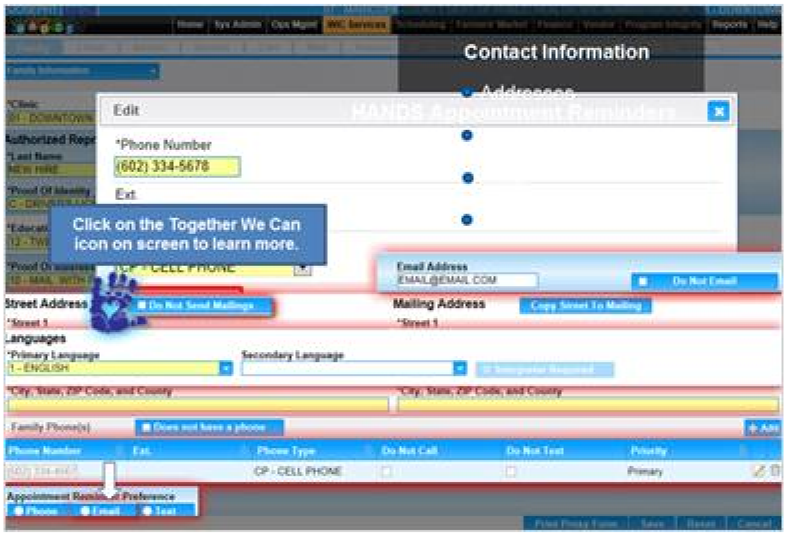
A (SLIDE LAYER)



C (SLIDE LAYER)



2.15 FAMILY INFORMATION - CONTACT INFORMATION



Notes:

You will also need to document contact information for the family, like addresses, phone numbers, email address, and confidentiality items.

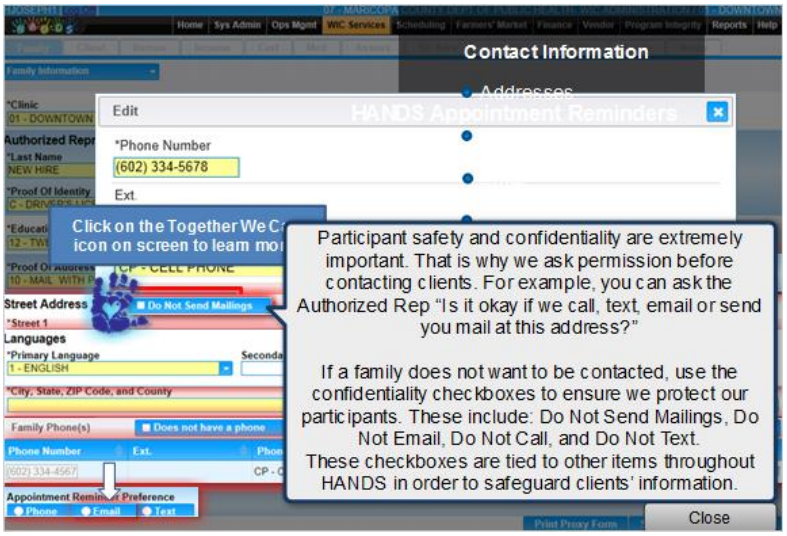
Confidentiality items include the Do Not Send Mailings, Do Not Email, Do Not Call, and Do Not Text checkboxes. You would select one or more of these boxes if an Authorized Rep states they would not like to be contacted. Select the Do Not Send Mailings and Do Not Email checkboxes on the main screen. Use the Add button on the Family Phone(s) grid to choose the Do Not Call and Do Not Text checkboxes.

A family's primary and secondary language and whether they need an Interpreter is documented on the Family Information screen. The Interpreter Required checkbox will not be available unless the family's Primary Language is other than English.

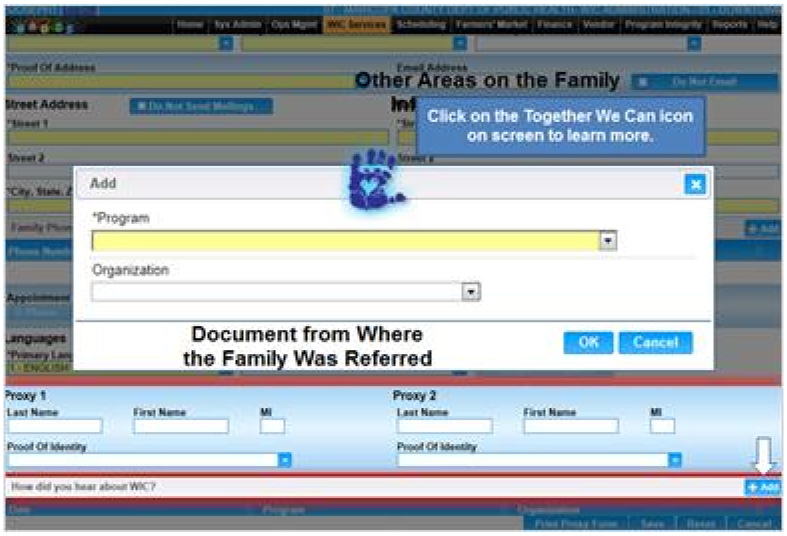
HANDS is equipped to send out Appointment Reminders via text and email, and there is a field to capture the client's preference.

Sometimes, for the options to be displayed, other fields need to be entered or available. For example, to have an Appointment Reminder Preference of Email displayed, the participant's Email Address needs to be filled in, and the Do Not Email checkbox needs to be un-checked.

A (SLIDE LAYER)



2.16 FAMILY INFORMATION - ADDITIONAL INFORMATION



Notes:

Other areas you may fill out on the Family Information screen are Voter Registration, Proxy, and the 'How did you hear about WIC?' sections.

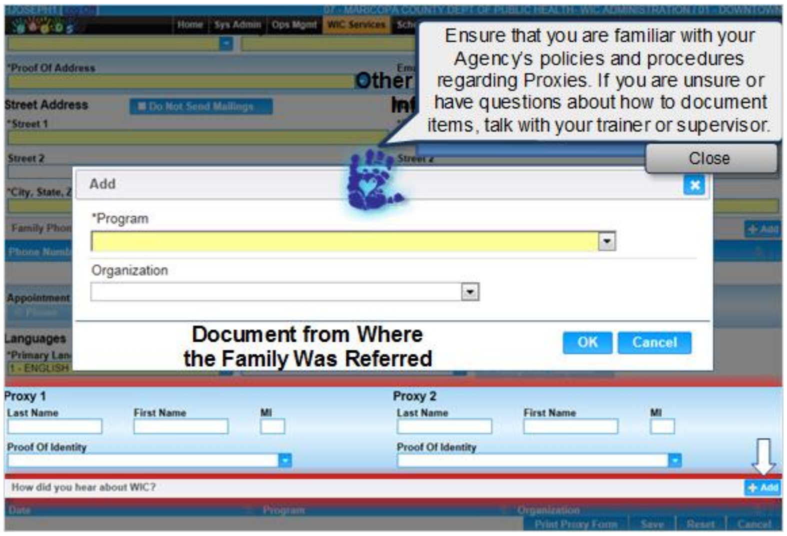
Some State Agencies are required to document Voter Registration status. If this is the case in your Agency, a Voter Registration pick list will display on this screen.

When the Authorized Reps can't pick-up and redeem benefits for the family, they have the option of sending a Proxy in their place. The family can designate up to two Proxies, and you would document that information here.

Finally, the 'How did you hear about WIC?' section is the area you document from where your new family was referred. You will be able to document both the Program and the Organization that told the family about WIC.

Click on the Together We Can icon on screen to learn more.

A (SLIDE LAYER)



2.17 FAMILY INFORMATION - SIGNATURE

Notes:

The Family Information screen has signature pad functionality so you can collect signatures for the Proxy form. You'll use the Signatures button to start the process.

When pressed, the Signatures button launches your signature pad and takes you to the Signature Information screen.

The screen will default to Proxy Form in the Signature Type field and will display part of the form that the client is signing. There is also space in the Comment box on the screen for you to leave a note, if you would like.

After you enter information on the screen, the Proxy will sign using the signature pad. Once the client is finished and everything is correct on the Information screen, click on the Save button.

After you save, the signature information, including an image of the signature, will display in the Signatures grid.

2.18 FAMILY INFORMATION - SUBSEQUENT CERTIFICATIONS AND UPDATES

Notes:

If you update certain items on the Family Information screen, you'll need to enter required fields again. For example, if you update Authorized Representative information, you'll need to update their Proof of Identity.

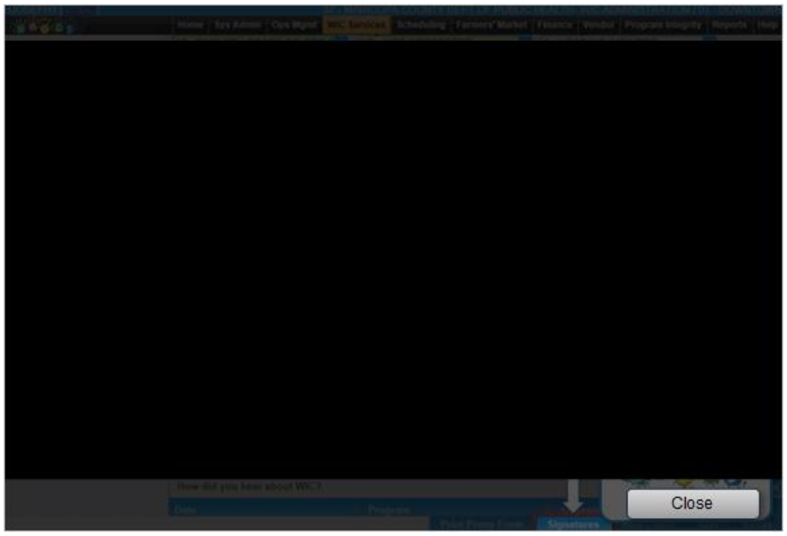
The same is true for Proxy Information and Proof of Identity. New Proxies will also need to sign the Proxy form using the signature pad.

If you update address information, HANDS will also require you to update Proof of Address and Voter Registration information, if your Agency has this field enabled.

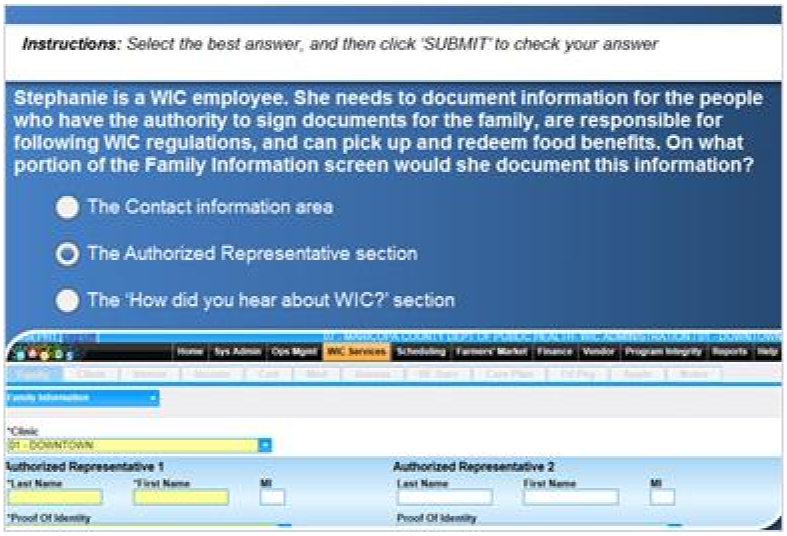
During subsequent certifications, all the information on the Family Information screen will need to be verified for accuracy. Some fields will need to be entered again, such as Proof of Identity, Proof of Address, and Register to Vote?

To view an example of how this would look if you were using HANDS, click the 'Example' button on screen.

VIDEO EXAMPLE (SLIDE LAYER)



2.19 SELF-CHECK - FAMILY INFORMATION



2.20 CLIENT REGISTRATION

Notes:

After you've entered and saved your new family on the Family Information screen, the New Client button will display. This button adds clients to the family.

New clients can also be added using the navigation menu found in Active Record.

After at least one client has been created in the family, additional clients can be added using the Add button on the Client Registration screen.

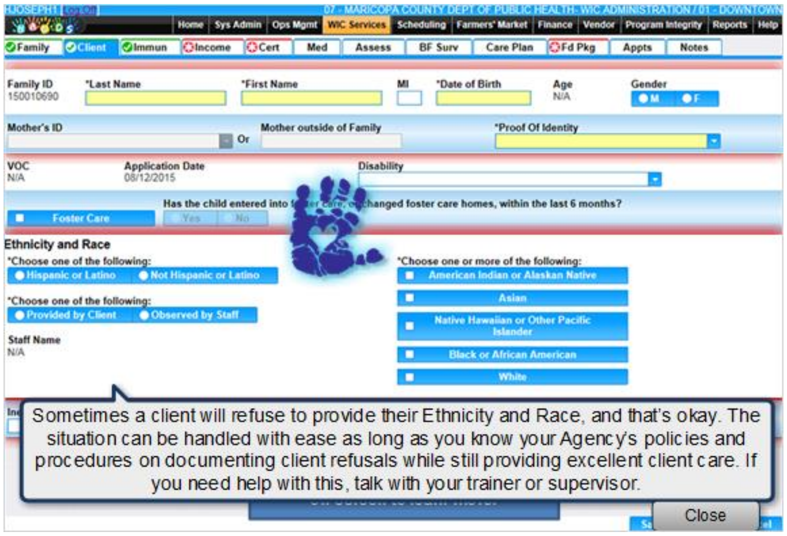
The Client Registration screen is where basic information about your client is documented such as Name, Date of Birth, and Proof of Identity.

Document your client's Ethnicity and Race and whether they provided that information or if it was observed by you.

There is also a field called Ineligibility Reason. The majority of the time, the system will automatically fill this field in when a client's certification ends. Ask your trainer about other uses for this field.

Click on the Together We Can icon on screen to learn more.

A (SLIDE LAYER)



2.21 CLIENT REGISTRATION - MOTHER AND INFANT/CHILD LINKAGE

Notes:

Linking a mother to her children is an important process that takes place on the Client Registration screen. In HANDS, you'll be required to either link mom to all of her children or to select a Reason Not Linked.

If the mother is a client in HANDS, link her to her children using one of two fields.

The Mother's ID field will list the eligible mothers in the family and you select one of the clients listed. It's best to add mom first when adding clients to the family. That way, when you add her children, she is available as an option in the Mother's ID pick list.

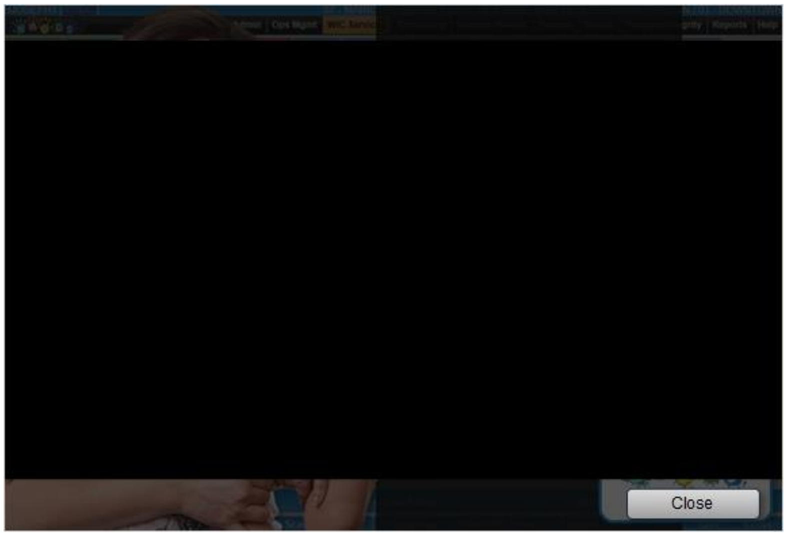
If the mother of the client is not in the family but participates in WIC, you'll type a Client ID into the Mother outside of Family field.

HANDS will display messages to remind you to select a Mother's ID if you don't link an infant or child to his or her mother.

Later in the training, we will cover other ways that HANDS ensures that this process is completed and how to select a Reason Not Linked.

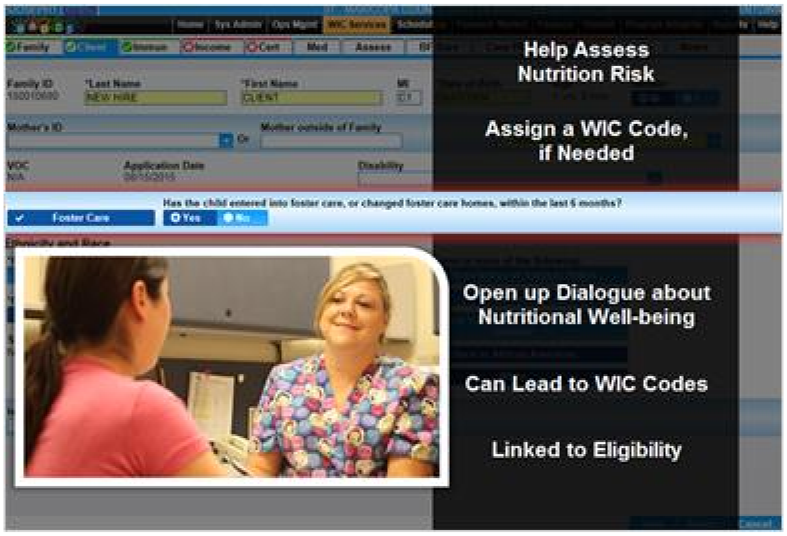
To view an example of how this would look if you were using HANDS, click the 'Example' button on screen.

VIDEO EXAMPLE (SLIDE LAYER)



2.22 SELF-CHECK - MOTHER AND INFANT/CHILD LINKAGE

2.23 CLIENT REGISTRATION - FOSTER CARE



Notes:

The Foster Care checkbox and associated question on the Client Registration screen are an example of assessing a client for nutrition risk and assigning a WIC Code, if needed.

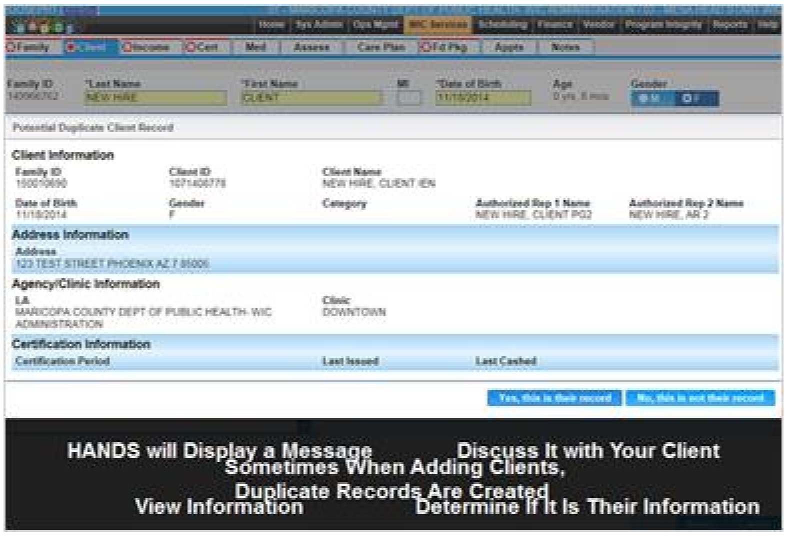
These questions, and others like them, may open up dialogue with the family about your client's nutritional well-being.

When combined with your critical thinking skills, the questions help assess nutritional risk, or conditions that predispose someone to poor nutritional patterns or nutrition-related medical conditions.

Sometimes the answers to these questions can lead to HANDS automatically populating a code, called a WIC Code, in your client's file. The Foster Care question is an example of this process. Other times, you will have to add the WIC Code yourself.

The Foster Care section is also linked to your client's eligibility information, as foster children are counted as their own families. We will cover this further in the next module.

2.24 CLIENT REGISTRATION - POTENTIAL DUPLICATES

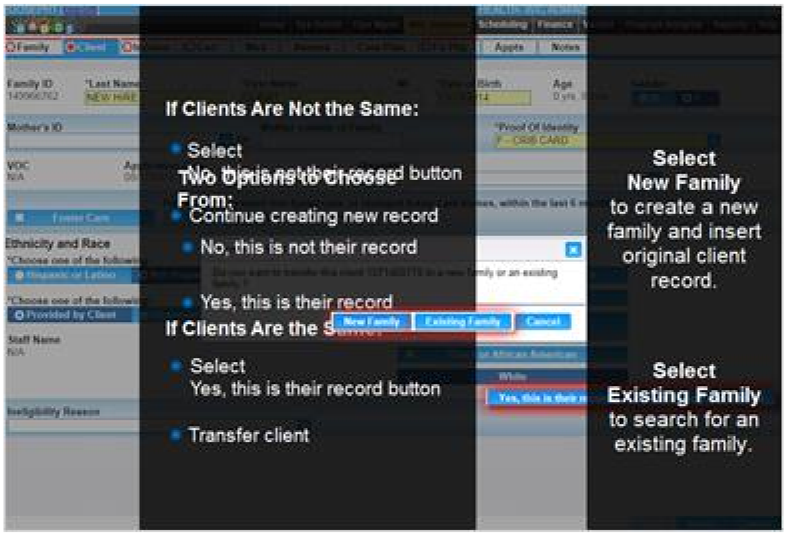


Notes:

Sometimes, when you're adding new clients to HANDS, duplicate client records are created. If certain client information matches, HANDS will display a message when you try to save the new client file.

You'll have a chance to view information in the existing file, discuss it with your client, and determine if it is their information.

2.25 CLIENT REGISTRATION - POTENTIAL DUPLICATES, CONTINUED



Notes:

When viewing the records, you'll have two options to choose from: No, this is not their record and Yes, this is their record.

If the clients are not the same, select the No, this is not their record button, and continue creating the new client.

If it is the same client, press the Yes, this is their record button and use the existing file to certify your client. Select a transfer option to continue.

Selecting the New Family button creates a new family record and inserts the original client information into that family.

Selecting the Existing Family button uses a modified search screen in order to transfer the original client record to an existing family.

The Potential Duplicate process will save you time, ensure you are using the correct records, and keep the system from getting filled with duplicate files.

2.26 CLIENT REGISTRATION - SIGNATURE

Notes:

The Client Registration screen has signature pad functionality so you can collect signatures for consent to release Verification of Certification, or VOC, information and to identify that a client's Proof of Identity does not exist. Use the Signatures button to start the process.

When pressed, the Signatures button launches your signature pad and goes to the Signature Information screen, just like on the Family Information screen.

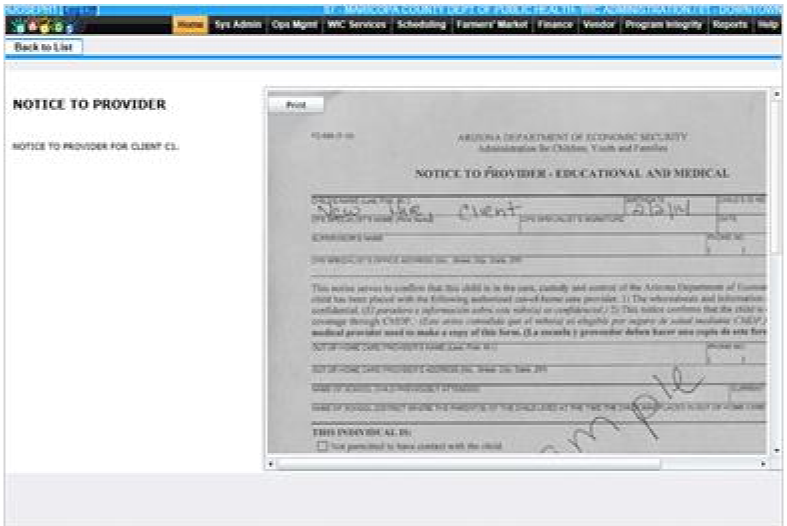
The screen will default to Verification of Certification in the Signature Type field and the client currently selected on the Client Registration screen.

Use the Signature Type pick list to identify what the client is signing for and select individual clients using the Client ID pick list. Just like before, use the Comment box to leave a note, if you would like.

After you enter information on the screen, have the Authorized Rep. sign using the signature pad.

Once they're finished and everything is correct on the Information screen, click Save. After you save, the signature information, including an image of the signature, will display in the Signatures grid.

2.27 CLIENT REGISTRATION - SCAN



Notes:

Scanning is available on the Client Registration screen.

You may need to scan certain items, such as Notice to Provider, VOC from other states, documents required by Local Agency policy, or items needed for a State Agency investigation.

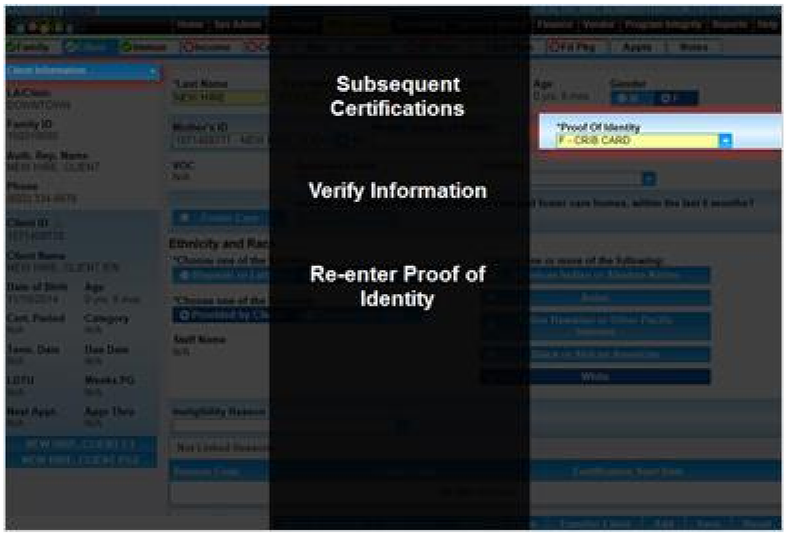
Other items, such as Food Package Prescriptions, will also need to be scanned into the system. These items will be discussed in future modules.

To start the scan process, select the Scan Document button. Enter a Title and a Description and press the Scan button.

After scanning is complete and you're happy with the image, select the Save button. Or you can adjust the document on the scanner and press the Scan button again.

The Scanned Documents grid will list information about each scan, including the Scan Title, Description, Scanned Date, and the person who scanned the item. Select the edit icon in the grid to view or print an image of the scan.

2.28 CLIENT INFORMATION - SUBSEQUENT CERTIFICATIONS AND UPDATES

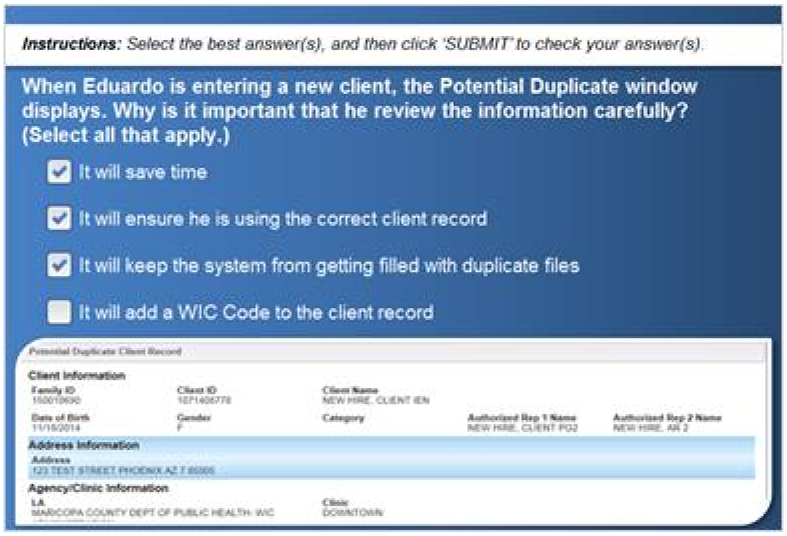


Notes:

After a client record is created and saved, the screen name will change from Client Registration to Client Information. This helps eliminate confusion when you use the navigation menus.

During subsequent certifications, the information on the Client Information screen will need to be verified for accuracy. The Proof of Identity field will need to be entered again.

2.29 SELF-CHECK - POTENTIAL DUPLICATES



2.30 ACTIVE RECORD

Notes:

A client's Active Record is one of the most useful tools in HANDS.

This area provides a snapshot of important information about the participant, all of which is grouped into one place for quick reference.

The Active Record will display after adding the family and at least one client.

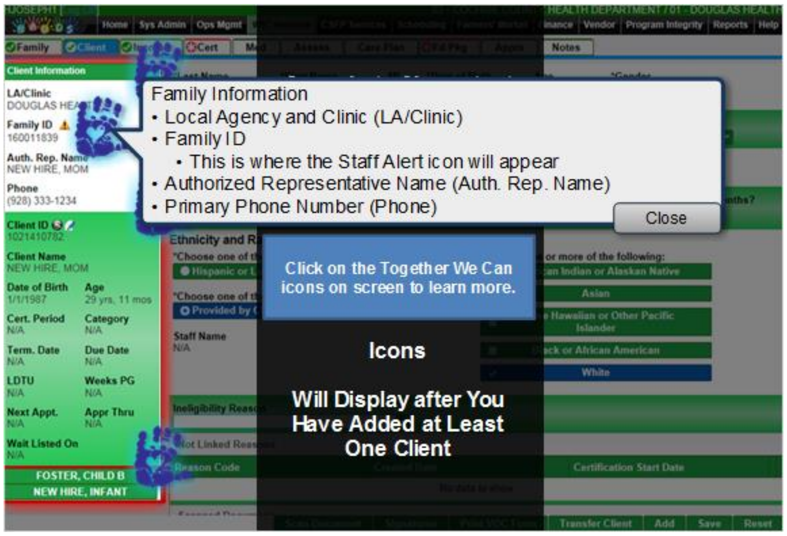
Active Record displays family information, client information, and information icons.

It also contains the navigation menu we learned about in Module 1 and will allow you to toggle between the clients in a family.

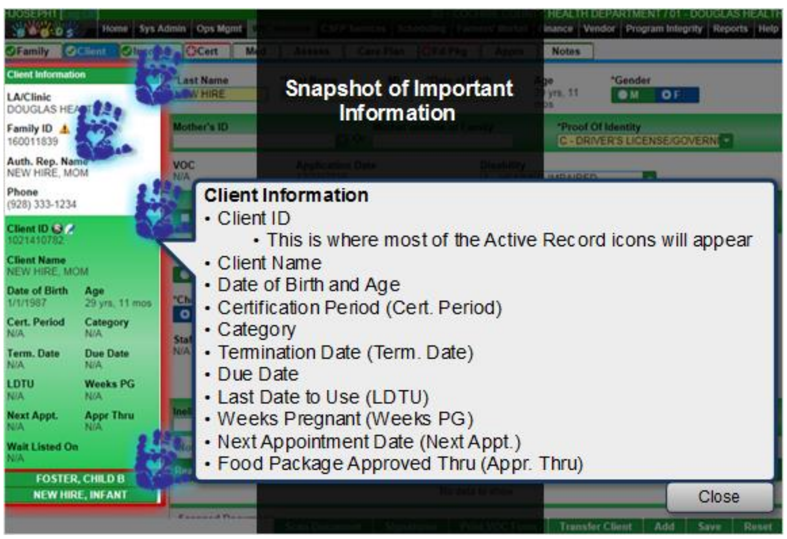
Now, let's explore Active Record a bit further.

Click on the Together We Can icons on screen to learn more.

A (SLIDE LAYER)

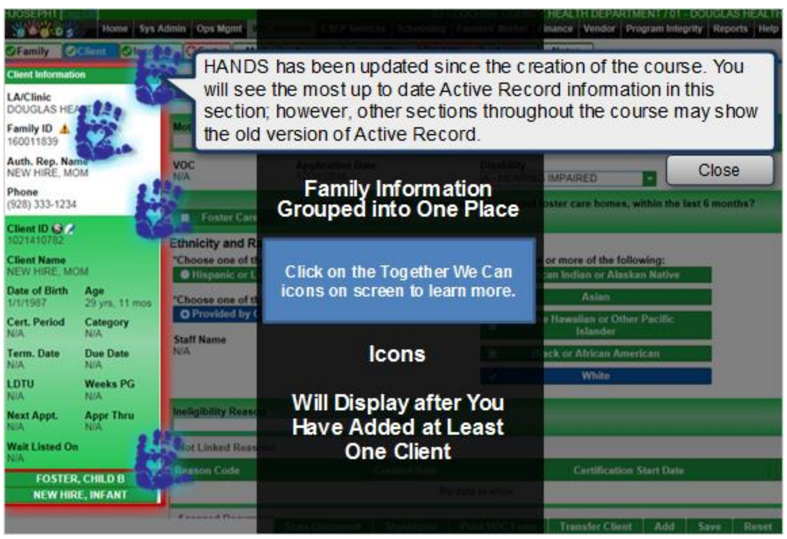


B (SLIDE LAYER)

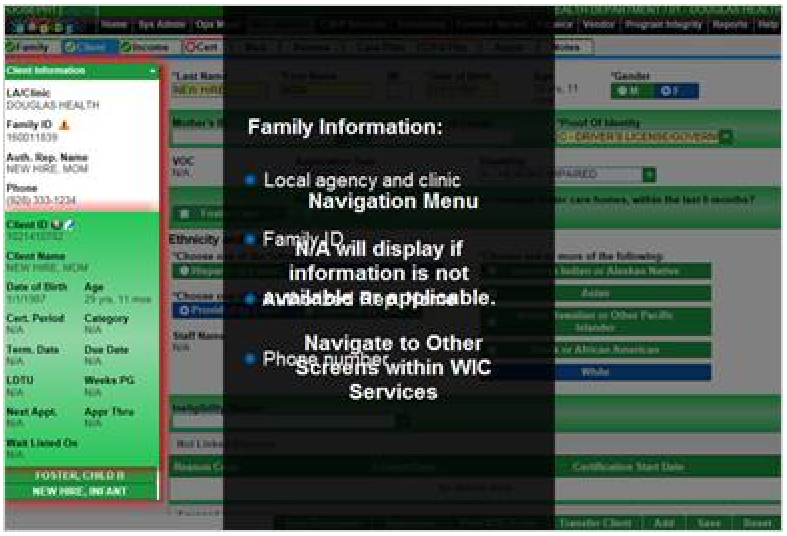


C (SLIDE LAYER)

D (SLIDE LAYER)



2.31 ACTIVE RECORD - FAMILY INFORMATION



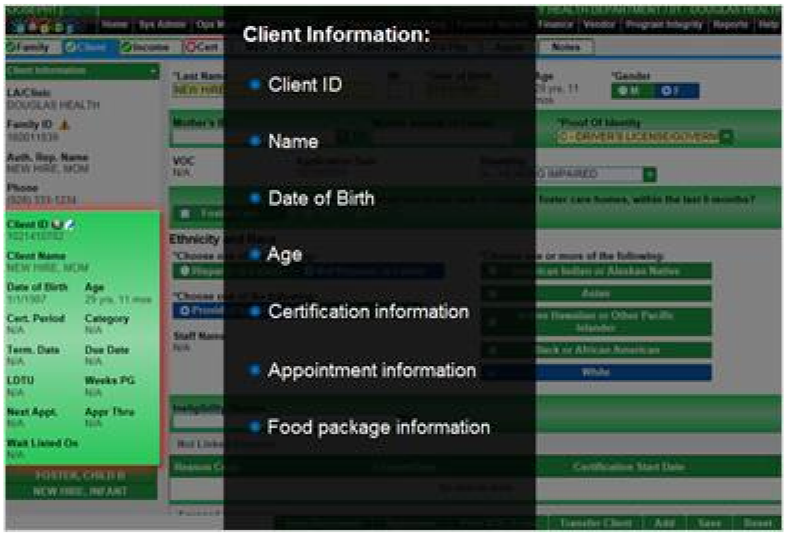
Notes:

The WIC Services navigation menu is in the top portion of the Active Record. As we learned in Module 1, this menu allows you to navigate to other screens within the WIC Services module.

The top portion also contains family information like Local Agency and Clinic, Family ID, Authorized Representative Name, and Primary Phone Number.

Each area of Active Record contains the same information for every client, with N/A displaying in spots where data is not available or not applicable.

2.32 ACTIVE RECORD - CLIENT INFORMATION



Notes:

The middle portion of Active Record contains client-specific information.

This information includes general information like Client ID, Name, Date of Birth, and Age.

It also has more specific data such as certification, appointment, and food package information.

2.33 ACTIVE RECORD - FAMILY MEMBER LISTING

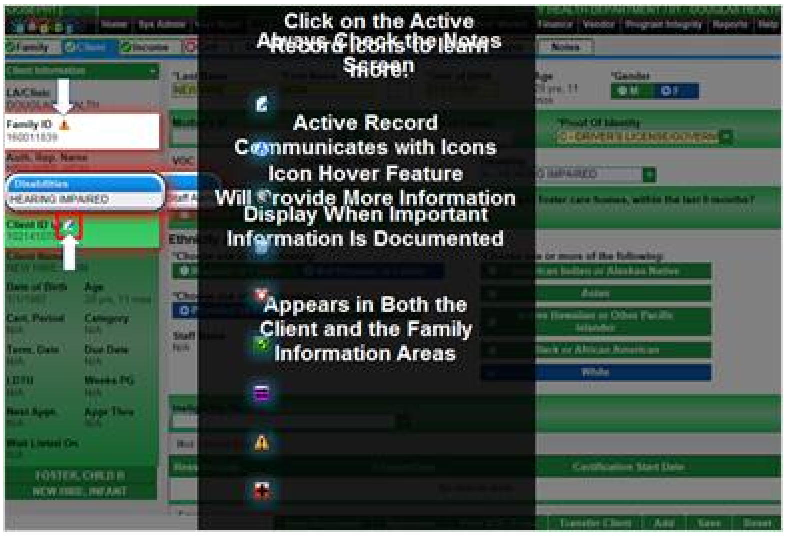
Notes:

The bottom portion of a client's Active Record lists the other members of the family and allows you to switch between the clients within a family.

If you move your mouse over the other members of the family, a hover box will appear listing information about each one. This hover will help you determine if this is the family member you want to select.

Selecting that family member's name will switch the record to their file. This is especially helpful if you need to complete certifications for several family members in the same visit.

2.34 ACTIVE RECORD - ICONS



Notes:

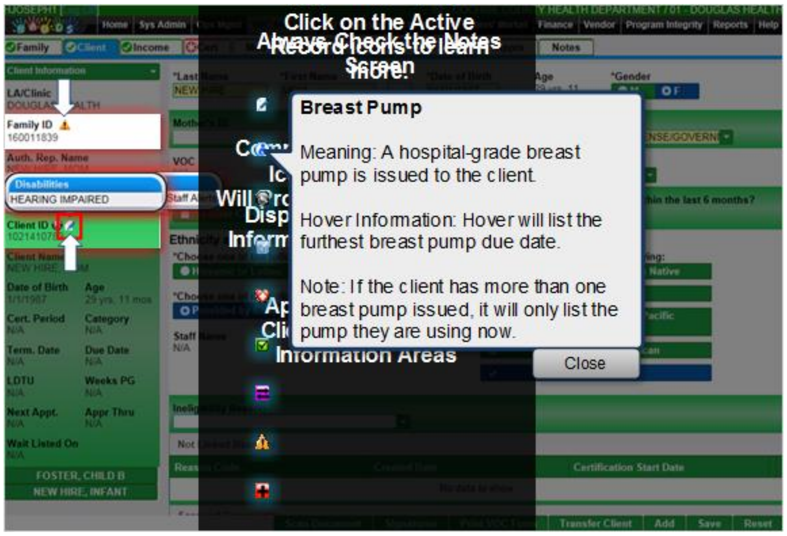
Active Record communicates with you using the icons that appear when important information is documented in a client's file. These icons will appear in both the client and the family information areas, next to the Client and Family IDs.

If you see one of these icons in a client's Active Record, use the icon hover feature to get more information.

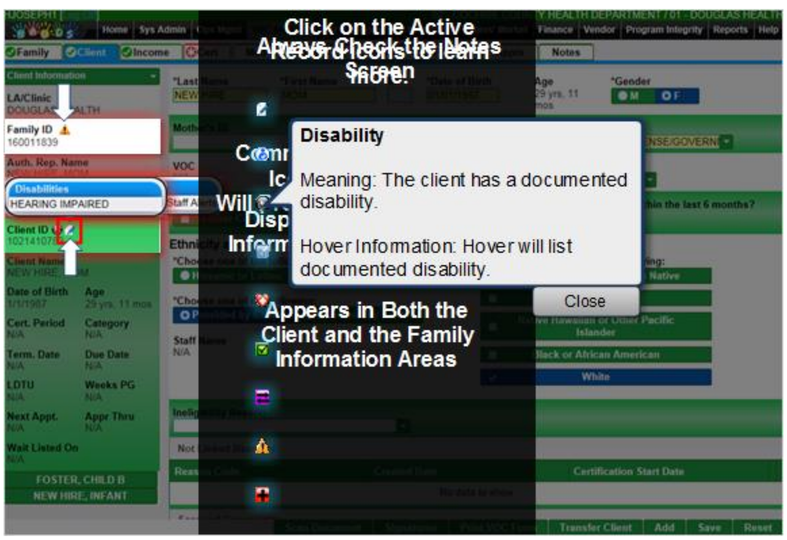
While the Active Record is very useful and provides information as to what the client may need, it's important to check your client's Notes to get a complete picture. We will cover Notes later in the course.

Click on the Active Record icons to learn more.

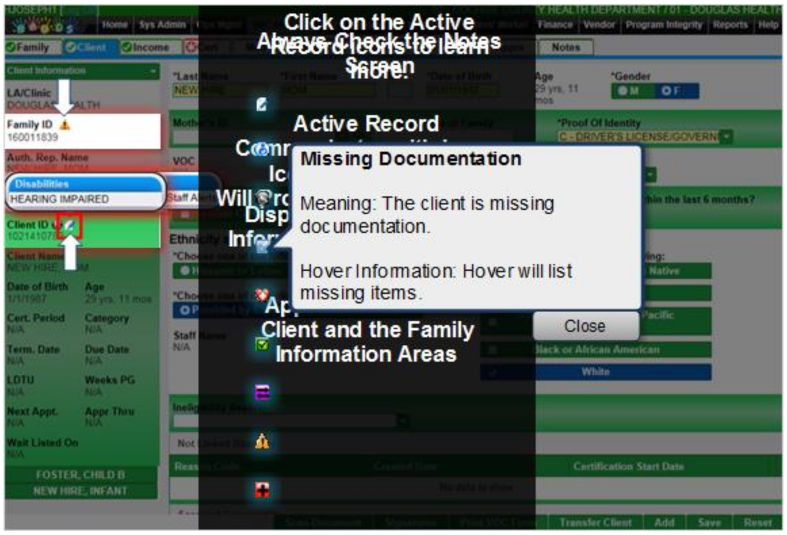
A (SLIDE LAYER)



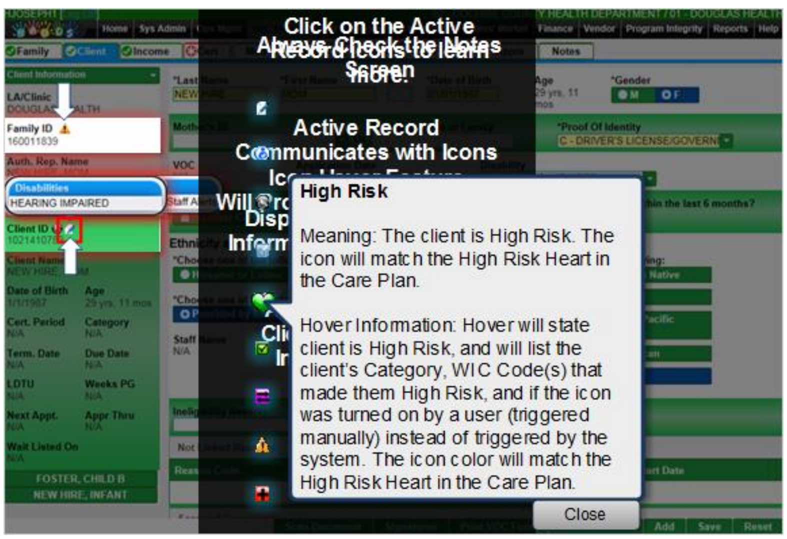
B (SLIDE LAYER)



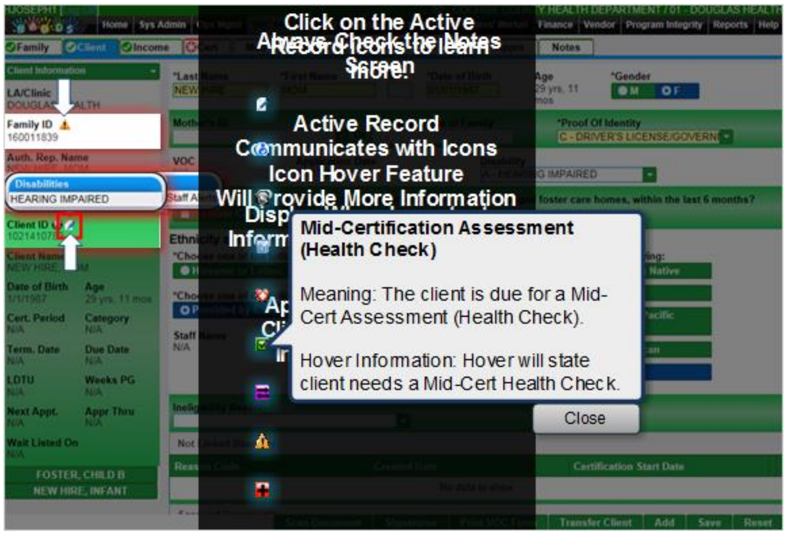
C (SLIDE LAYER)



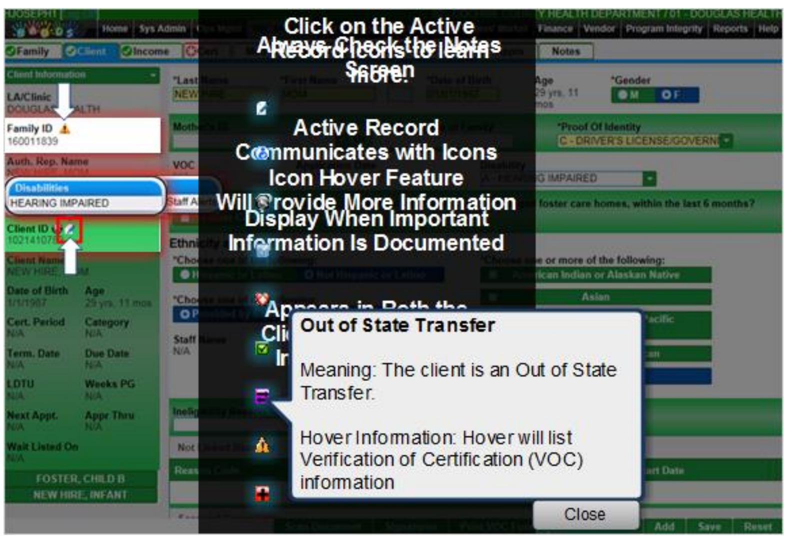
D (SLIDE LAYER)



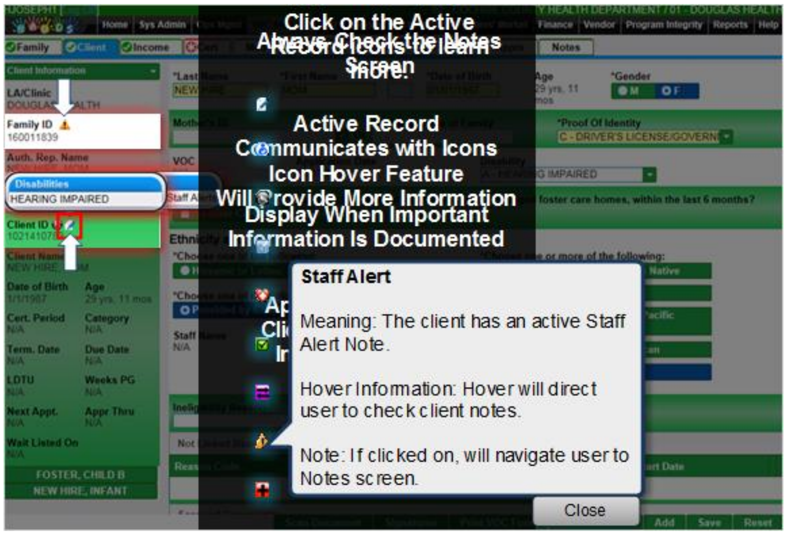
E (SLIDE LAYER)



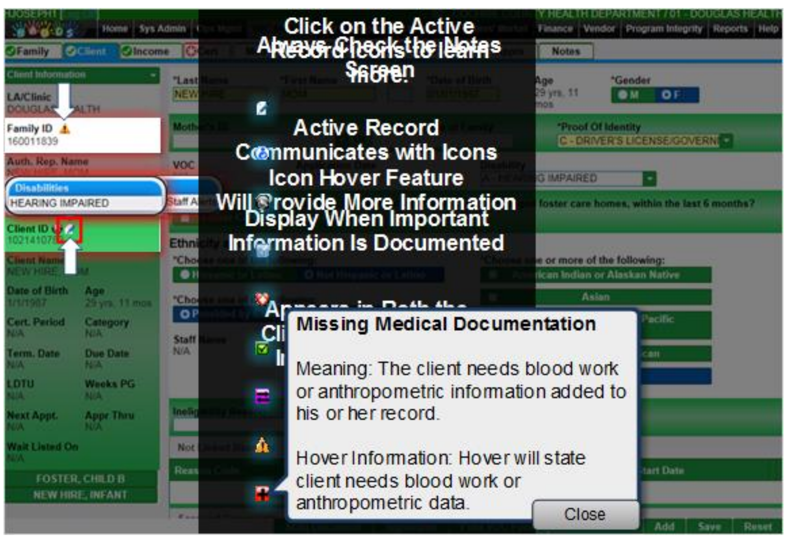
F (SLIDE LAYER)



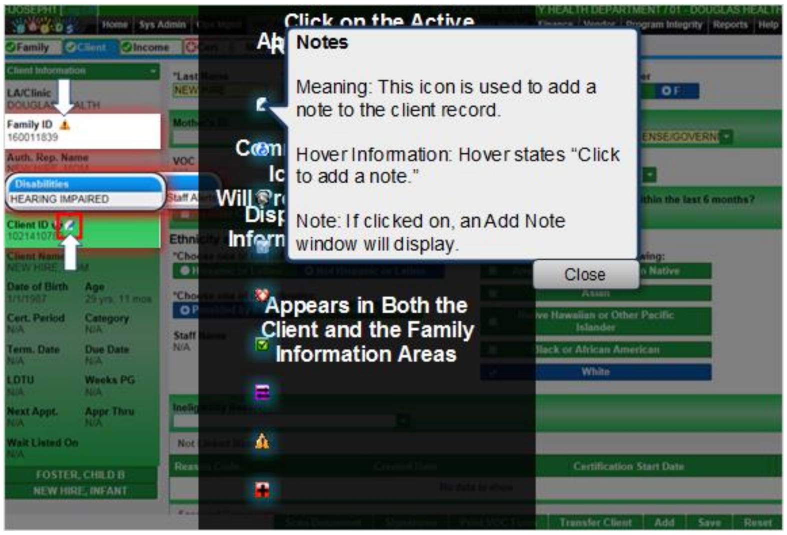
G (SLIDE LAYER)



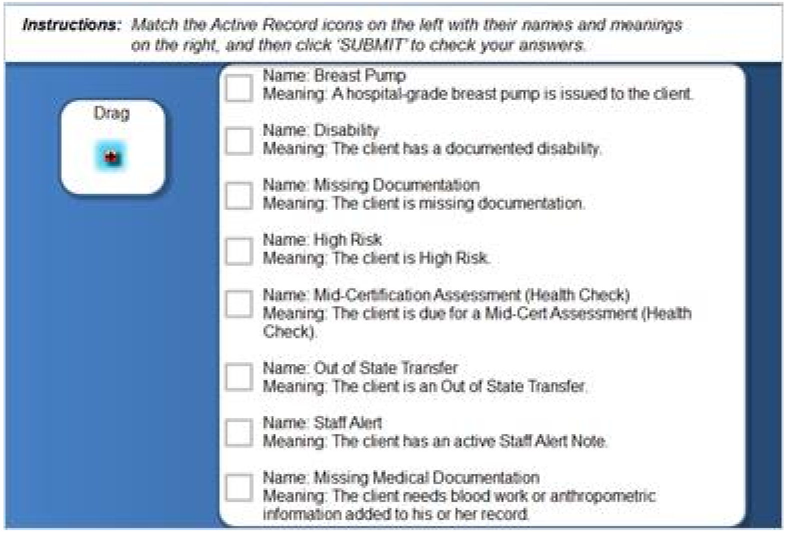
H (SLIDE LAYER)



I (SLIDE LAYER)



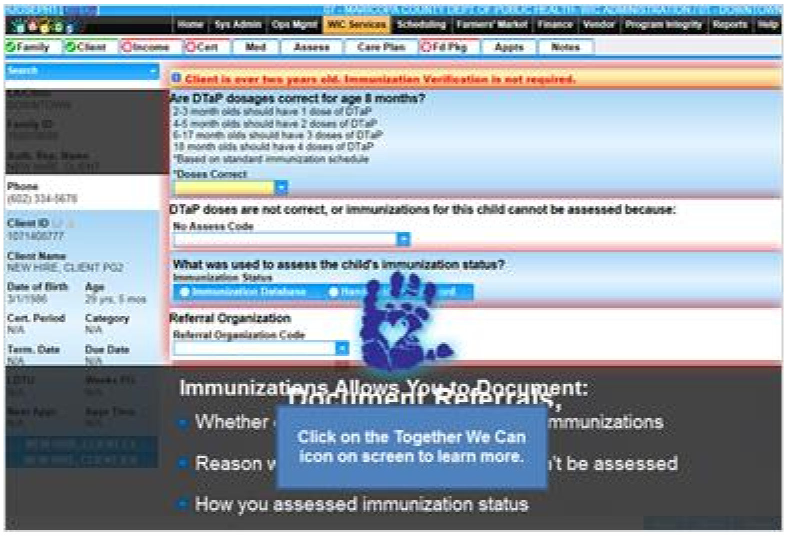
2.35 SELF-CHECK - ACTIVE RECORD



Notes:

Match the Active Record icons to their names and meanings.

2.36 IMMUNIZATION



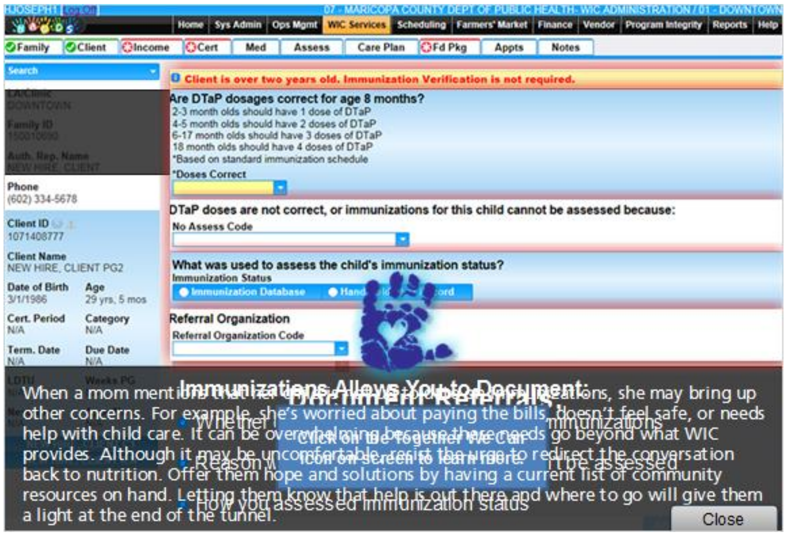
Notes:

If you have a client that is less than 24 months of age, you'll need to enter his or her Immunization information. The Immunization tab will only appear for those clients in the Certification Flow Menu.

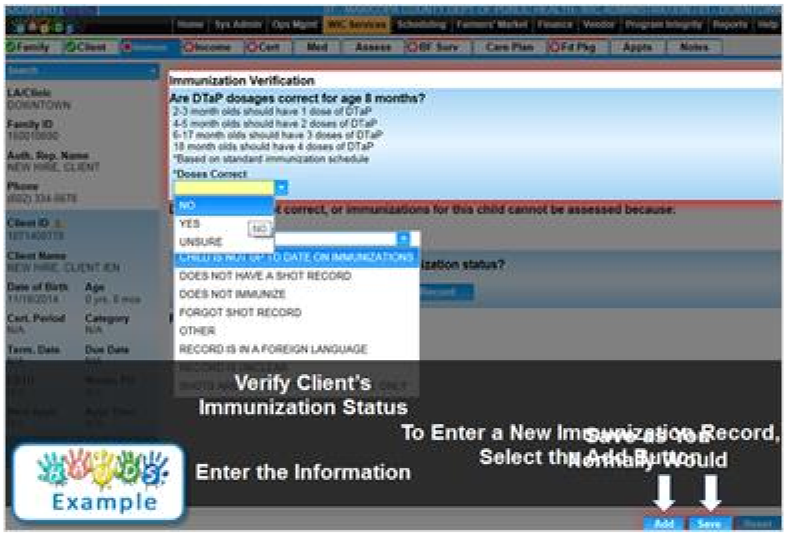
If you toggle between clients on the screen using Active Record and select a client over 24 months, a disabled screen will appear with a message reminding you that the client is over two years old.
The Immunization screen allows you to document whether or not a client is current on immunizations, and if not, the reason why they are not up to date or can't be assessed.

Next, you'll document how you assessed the client's immunization status. If you provide an immunizations referral for your client, you can document it using the Referral Organization pick list.

A (SLIDE LAYER)



2.37 IMMUNIZATION - SUBSEQUENT CERTIFICATIONS AND UPDATES



Notes:

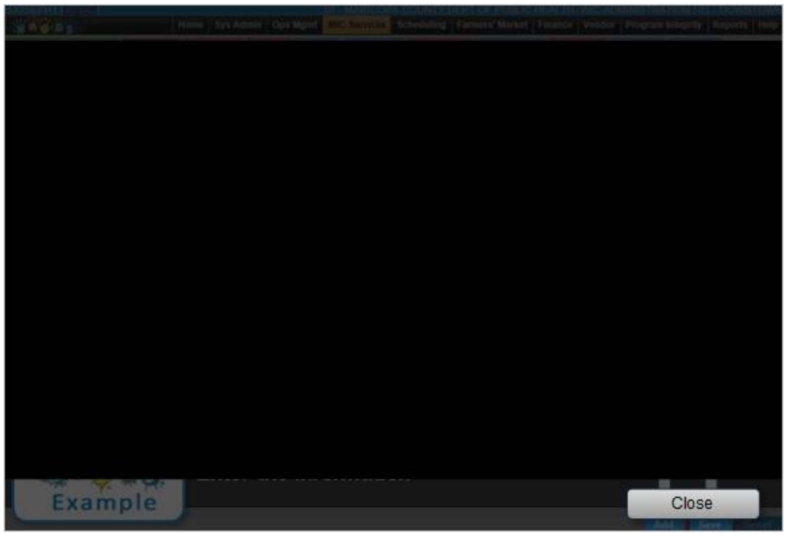
Immunization information will need to be verified and documented for every client under two years of age at each certification.

To enter a new immunization record, select the Add button at the bottom of the screen.

Then, verify your client's immunization status, enter the information on the Immunization screen, and save as you normally would.

To view an example of how this would look if you were using HANDS, click the 'Example' button on screen.

VIDEO EXAMPLE (SLIDE LAYER)



2.38 SELF-CHECK - IMMUNIZATION

2.39 SUMMARY

Notes:

You've made it through Module 2 of the HANDS New Hire course.

In this module, you learned how to start the intake portion of a certification.

We found out about searching for clients using the Client Family Search screen. You know about the intake portion of the certification process, including how to enter family and client information using the Family Information, Client Registration, and the Immunization screens.

You learned about the different components of a client's Active Record, like the icons, family section, client section, family member listing and toggle feature.

You also understand the importance of quality customer service and setting the tone for your family's appointment.

In the next module, we'll cover the eligibility portion of a certification. We will look at how to document a client's income and other programs in which they may be participating that make them eligible for WIC.

We'll also learn about the different groups, or categories, that are eligible for WIC services and documenting your client's Category information in HANDS.

MODULE 3 - ELIGIBILITY

3.1 ELIGIBILITY

Notes:

Now that you're comfortable with the intake process, it's time to move on to determining eligibility. To participate in the WIC program, an applicant needs to meet eligibility requirements in four areas. These areas are residence, income, category, and nutrition risk.

Screening for eligibility gets clients one step closer to receiving the amazing services WIC provides, like helping choose healthy foods, breastfeeding support, finding community resources for moms and their children, and more.

You've already learned a little about documenting residence and nutrition risk in Module 2.

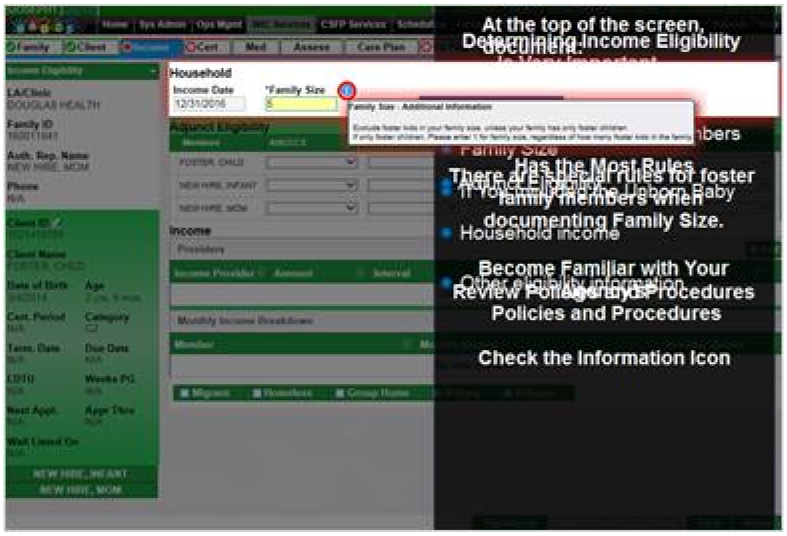
In this module, you'll learn about documenting an applicant's income and categorical eligibility using the Income Eligibility and the Certification Action screens.

You'll learn about documenting family size, income, and other information that affects income documentation, such as homelessness.

You'll also learn about entering participation and referral information for adjunctively eligible programs. These are other federal or state programs that may make an applicant income eligible for WIC.

In addition, I'll teach you about what makes a person categorically eligible for WIC and how to enter category information into HANDS.

3.2 INCOME ELIGIBILITY



Notes:

Determining income eligibility is a very important part of the overall eligibility process, and it has the most rules. As such, it's important to become familiar with your Agency's policies and procedures for determining both income and adjunct eligibility. Review previous modules, such as WIC 101, for more information.

One of the best features of the Income Eligibility screen is that it allows you to document a lot of information for all family members, including foster members, in one place.

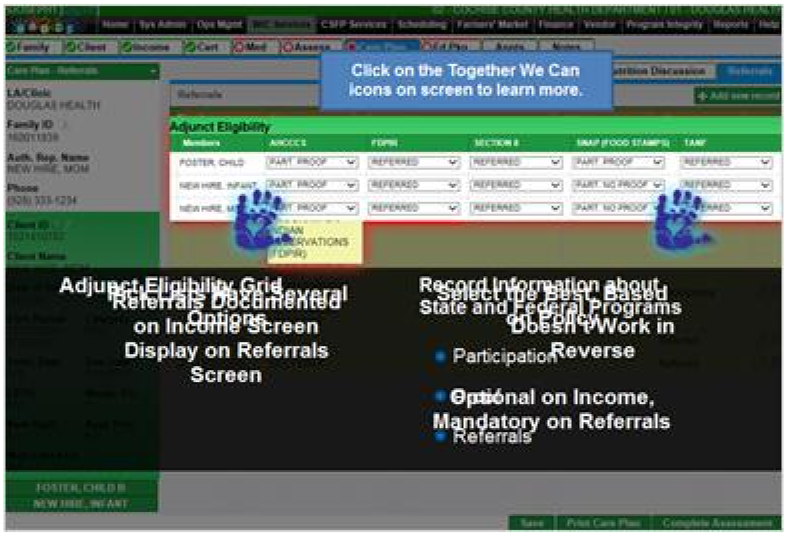
All family members' income eligibility information is documented on this screen. This information includes Adjunct Eligibility or referrals to Adjunctively Eligible programs, household income, and other eligibility information.

At the top of the screen document Family Size and whether the unborn baby was included in the Family Size.

There are special rules for foster family members when documenting Family Size. Make sure to review your Agency's policies and procedures for entering Family Size for foster family members.

Check the information icon next to the Family Size field for more information.

3.3 INCOME ELIGIBILITY - ADJUNCT ELIGIBILITY



Notes:

The Adjunctive Eligibility grid is where information is recorded about State and Federal programs that may make clients income eligible for WIC.

Document whether or not the clients are participating in these programs. You'll also document whether the clients brought proof of participation in the program or not, or you may also document if they were referred to a program.

The pick lists in the grid have several options to choose from. Select the best option based on your Agency's policies and procedures. Documentation of participation in adjunctively eligible programs is optional in the Income Eligibility screen, but it will be mandatory once you are in the Care Plan - Referrals screen.

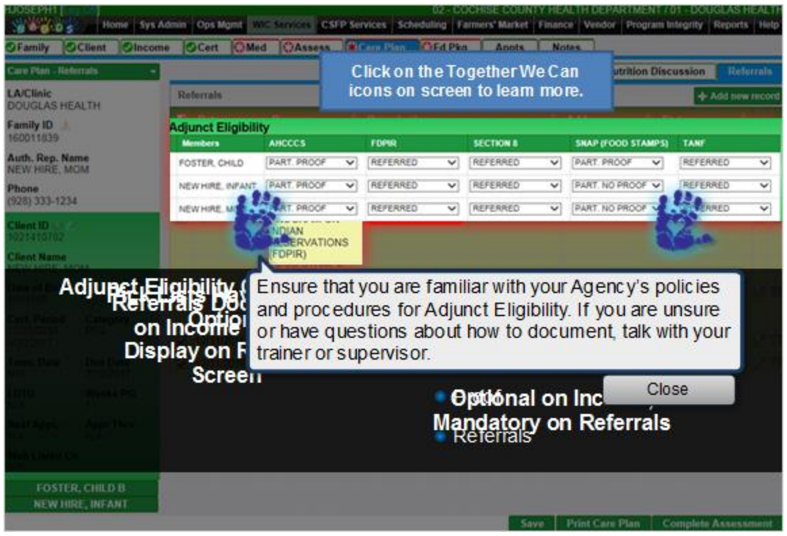
If it is documented that a client was referred to a program on the Income screen, that information will automatically show on the Referrals screen.

This won't work in reverse though; referrals documented on the Referrals screen won't show up on the Adjunct Eligibility grid.

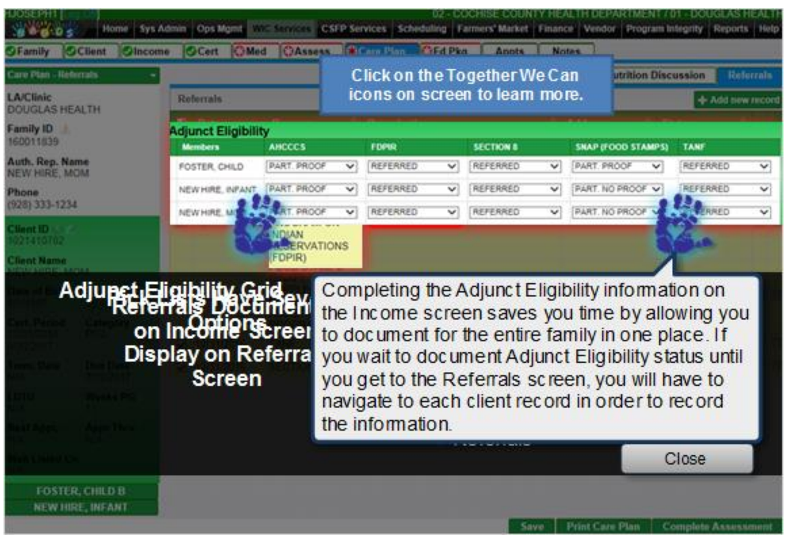
The Care Plan - Referrals screen will be reviewed later in the course.

Click on the Together We Can icons on screen to learn more.

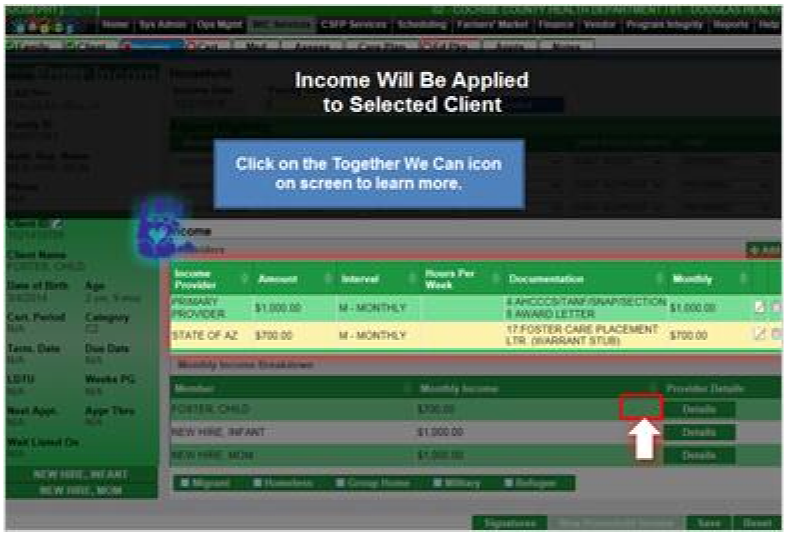
A (SLIDE LAYER)



B (SLIDE LAYER)



3.4 INCOME ELIGIBILITY - INCOME PROVIDERS AND OTHER INFORMATION



Notes:

Below the Adjunct Eligibility grid is the Income Providers grid. Income can be documented for a single client, or the entire family, using this grid.

Press the Add button on the Income Providers Grid, and a pop-up will display.

For each person that provides income for the household, enter Provider name, Amount, Interval, and Documentation information.

Then, select the family members to whom you would like to apply the income using either the Family Member or the Foster Children pick lists.

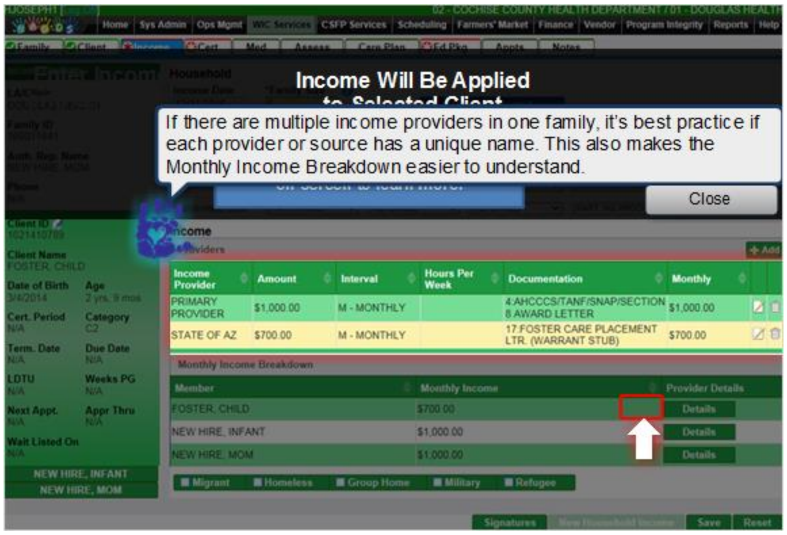
When entering income for foster family members, document income one at a time.

You'll also document foster family members separately from other members of the family.

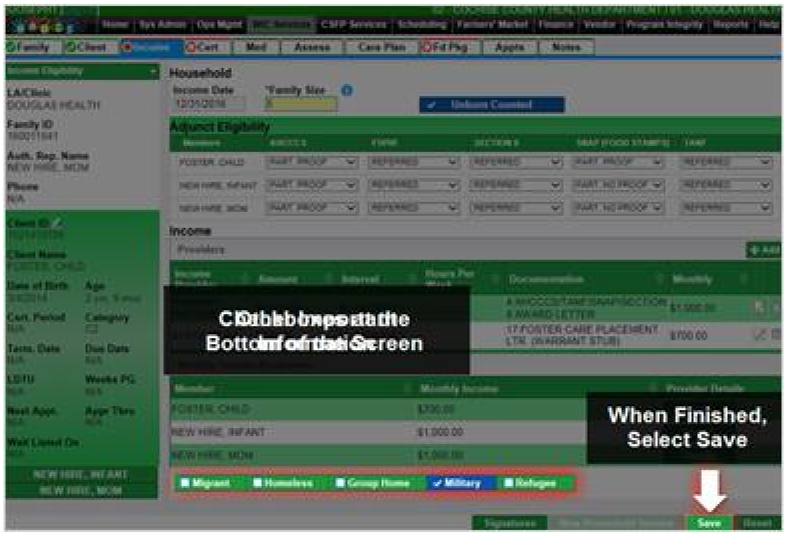
After income information has been entered, and OK is selected in the pop-up, the income information you entered will be applied to the family member or members selected. This process needs to be completed for each income provider in the household.

Click on the Together We Can icon on screen to learn more.

A (SLIDE LAYER)



3.5 INCOME ELIGIBILITY - INCOME PROVIDERS AND OTHER INFORMATION, CONTINUED



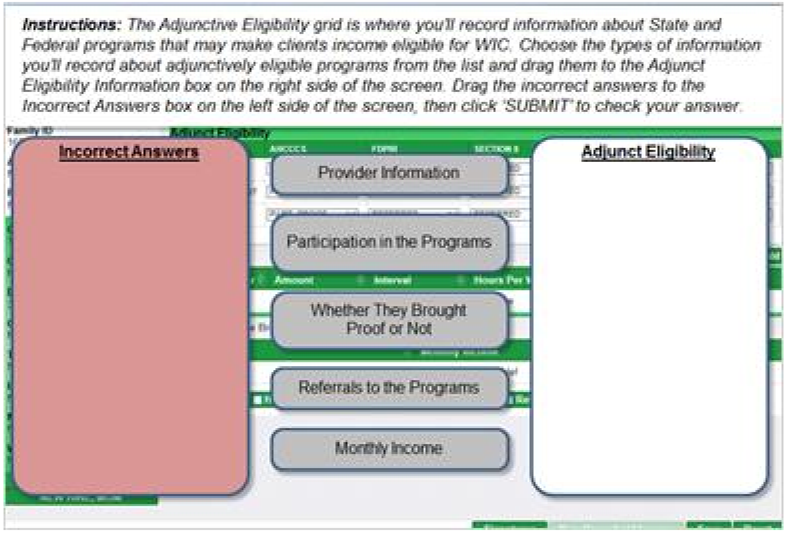
Notes:

Other information, such as a client's refugee or military status, is important when determining income eligibility.

Use the checkboxes at the bottom of the screen to document this information.

Once you are finished entering in all of the information on the screen, select the Save button.

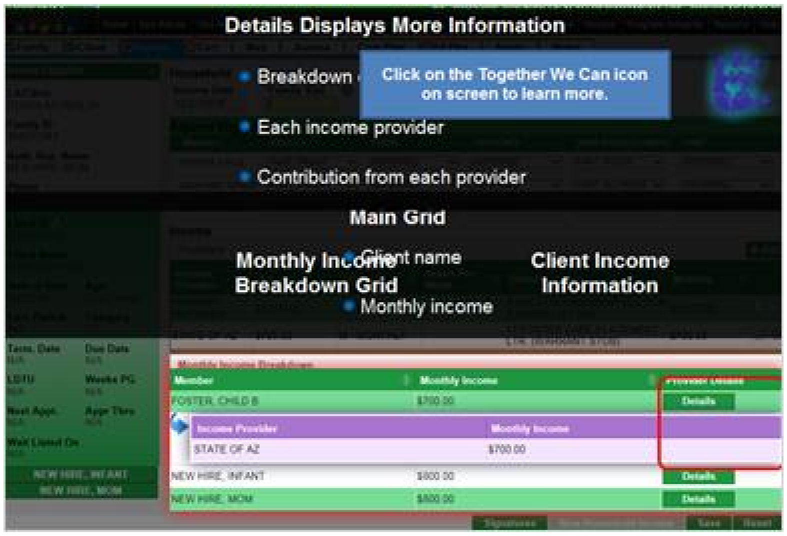
3.6 SELF-CHECK - ADJUNCT ELIGIBILITY



Notes:

The Adjunctive Eligibility grid is where you'll record information about State and Federal programs that may make clients income eligible for WIC. Choose the types of information you'll record about adjunctively eligible programs from the list and drag them to the Adjunct Eligibility Information box on the right side of the screen. Drag the incorrect answers to the Incorrect Answers box on the left side of the screen, then click 'SUBMIT' to check your answer.

3.7 INCOME ELIGIBILITY - MONTHLY INCOME BREAKDOWN



Notes:

Income Eligibility screen displays information for the entire family; however, eligibility is client-based and may vary for each participant.

The Monthly Income Breakdown grid is a handy tool that allows you to see what income information has been applied to which client.

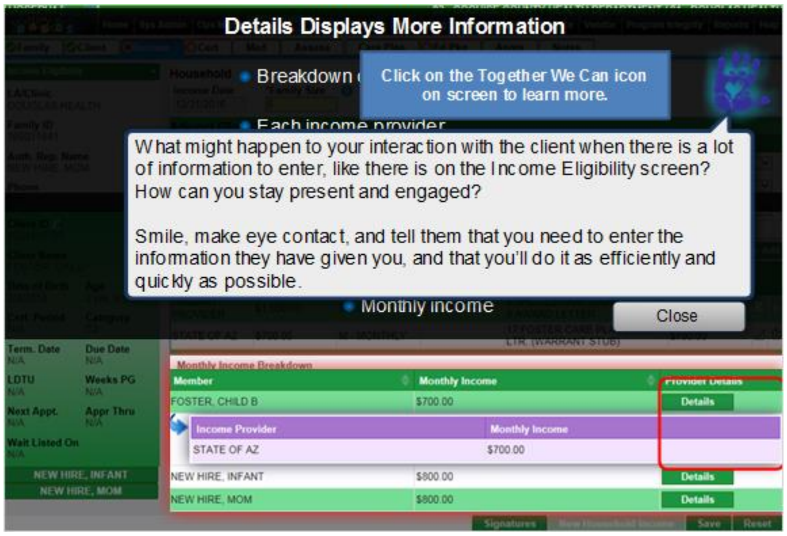
The main grid lists the name of the client and his or her Monthly Income.

Select the Details button to see more information about each client. The additional information lists a breakdown of the Monthly Income, including the Income Provider's name and how much that provider contributed to the client's Monthly Income.

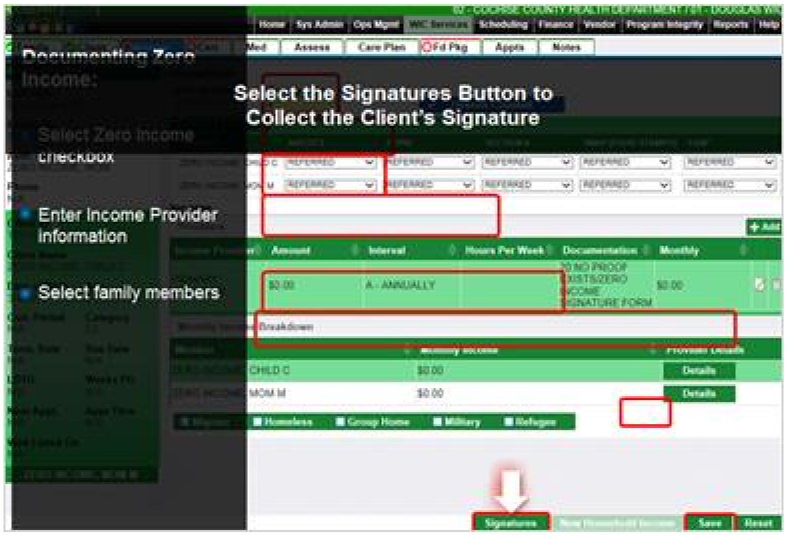
If there are multiple income providers for the client, it will list how much comes from each provider per month for that client.

Click on the Together We Can icon on screen to learn more.

A (SLIDE LAYER)



3.8 INCOME ELIGIBILITY - ZERO INCOME MISSING DOCUMENTATION



Notes:

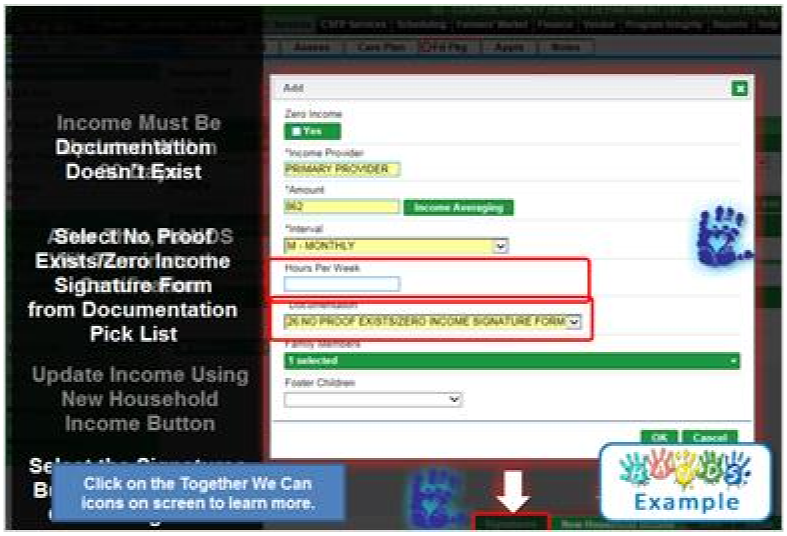
Sometimes, there are special circumstances that need to be documented using the Income Provider's grid. Clients may state that they have no income that they have forgotten their income documentation, or that proof of their income doesn't exist.

To document zero income, select the Zero Income checkbox in the Add pop-up window. HANDS will automatically fill in the Amount, Interval, and Documentation fields.

You'll enter the Income Provider information and select the applicable family members. Select OK, and then Save.

Select the Signatures button to collect the client's signature for zero income.

3.9 INCOME ELIGIBILITY - FORGOT DOCUMENTATION



Notes:

Documenting when a client forgets his or her income eligibility paperwork or when his or her paperwork doesn't exist is similar to documenting standard income.

For each person that provides income for the household, enter Provider, Amount, and Interval information.

If the client has forgotten his or her documents, select Forgot Documentation from the Documentation pick list.

If the client is income eligible, he or she will receive one month of benefits. The Missing Documentation icon in Active Record will appear. This icon serves to remind you that the client's income record needs to be updated in order for him or her to continue to receive services.

The income record must be updated within 30 days for the client's certification to remain active. After that, HANDS will terminate the certification and the income record will need to be updated using the New Household Income button. You'll learn more about updating income later in the module.

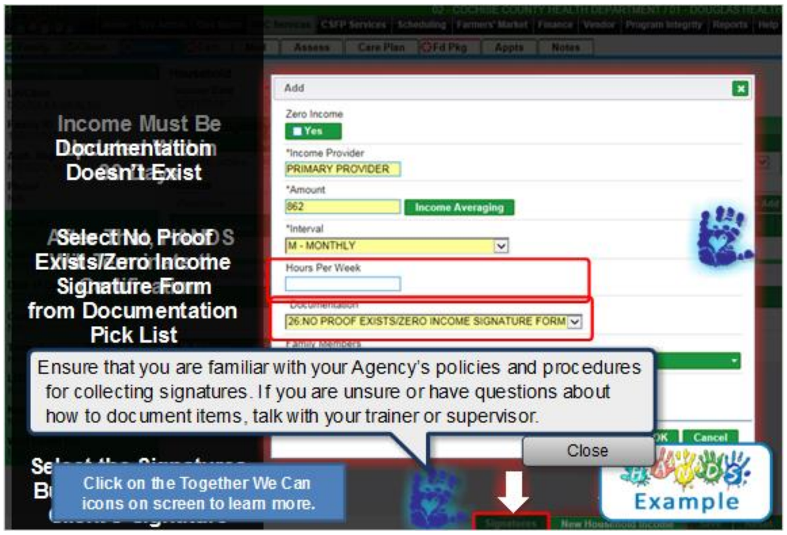
For the times when documentation doesn't exist, select the No Proof Exists/Zero Income Signature Form from the Documentation pick list.

Select the Signatures button to collect the client's signature for both forgot documentation and when documentation doesn't exist.

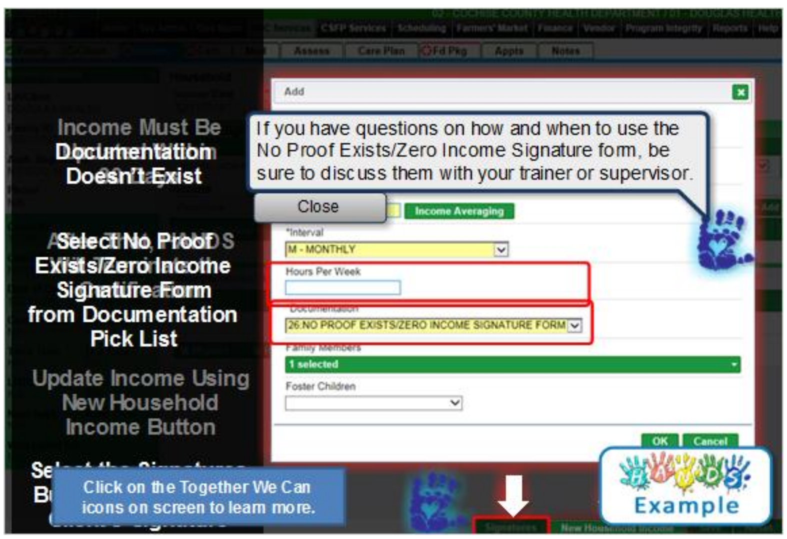
Click on the Together We Can icons on screen to learn more.

To view an example of how this would look if you were using HANDS, click the ‘Example’ button on screen.

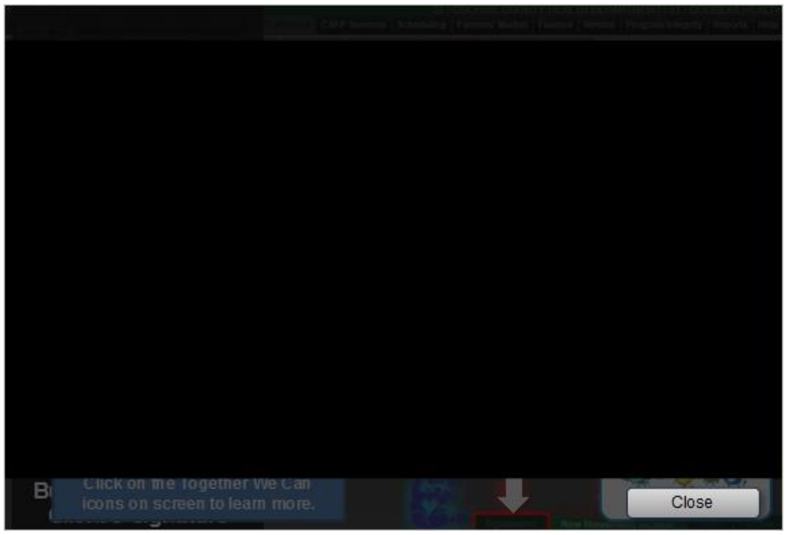
A (SLIDE LAYER)



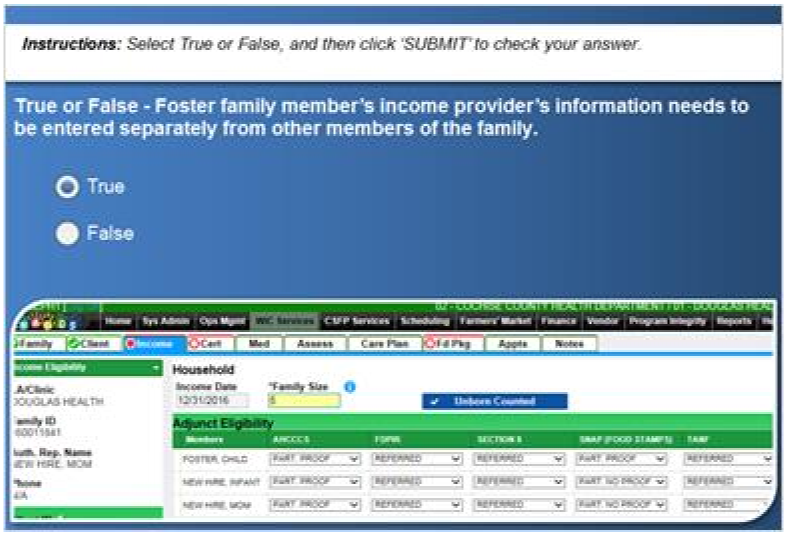
B (SLIDE LAYER)



VIDEO EXAMPLE (SLIDE LAYER)



3.10 SELF-CHECK - FOSTER INCOME



3.11 INCOME ELIGIBILITY - SIGNATURE

Notes:

As previously mentioned, the Income Eligibility screen has signature pad functionality to collect signatures for Income information, including statements that the client has zero income, that no proof of income exists for the client, and that the client has forgotten his or her income documentation.

There is also an option to collect a signature for the Notice of Income Ineligibility.

Use the Signatures button to start the process, just like on the Family Information screen.

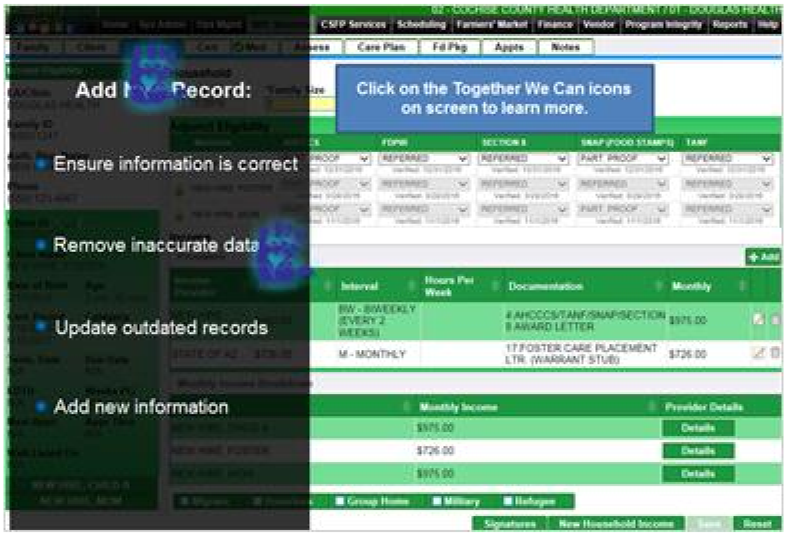
The Signature Type field will default to the Zero Income Waiver Form, and the Client ID field will be blank.

Select the type of signature you're collecting and, if applicable, the individual client for whom you're collecting the signature using the Client ID pick list. Use the Comment box to leave a note, if you would like.

After entering information on the screen, have the Authorized Rep. sign using the signature pad.

Once he or she is finished and everything is correct on the Signature Information screen, click Save. After saving, the signature information, including an image of the signature, will display in the Signatures grid.

3.12 INCOME ELIGIBILITY - SUBSEQUENT CERTIFICATIONS AND UPDATES



Notes:

Income information can be updated directly on the Income Eligibility screen within the first 30 days of entering a new record.

After 30 days, the income record will need to be updated using the New Household Income button.

Click on the New Household Income button to add a new income record to a client or family's file.

The previous income information will be copied into the new record. Verify all the information on the screen, paying close attention to the Adjunct Eligibility and Income Providers' information.

If a small padlock icon displays next to a client's name in the Adjunct Eligibility grid, click on the padlock to clear out previous data, then enter updated information.

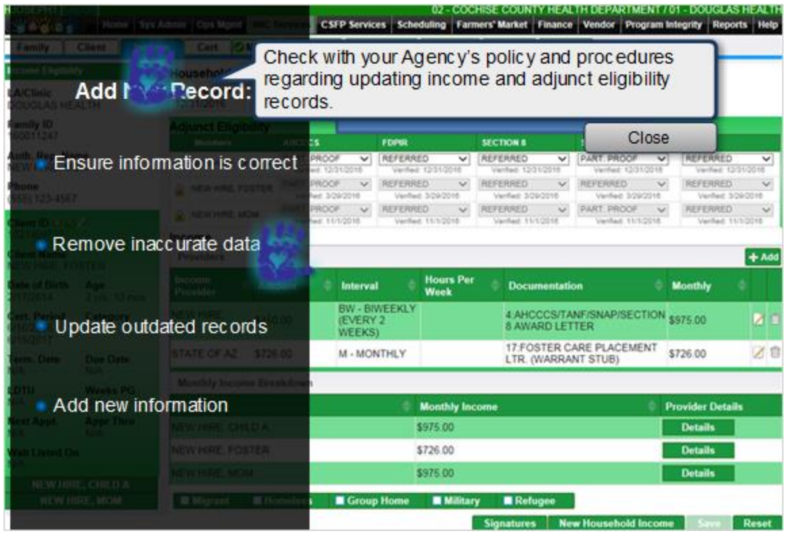
To edit information in the Providers grid, select the Edit icon, which looks like a pencil and paper, next to the record you wish to change.

Select the Delete icon, which looks like a trash can, next to a record you wish to remove.

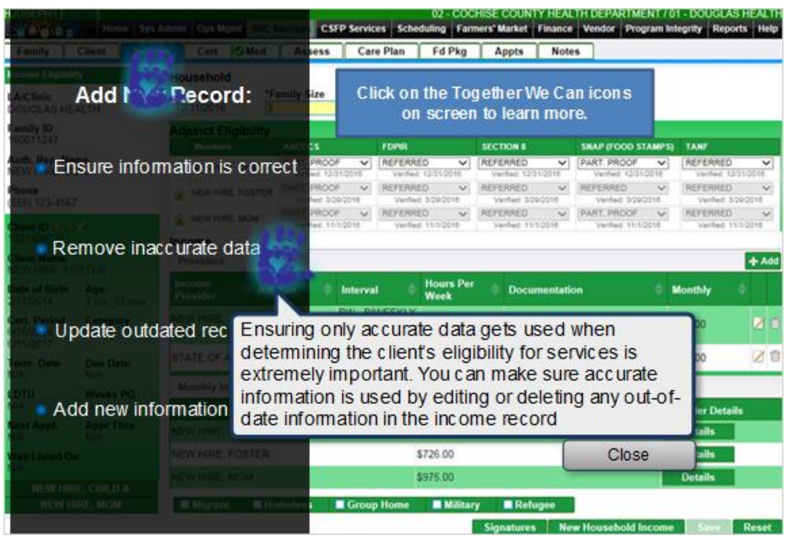
Ensure all of the information is correct, remove inaccurate data, update outdated records, and add any new information.

Click on the Together We Can icons on screen to learn more.

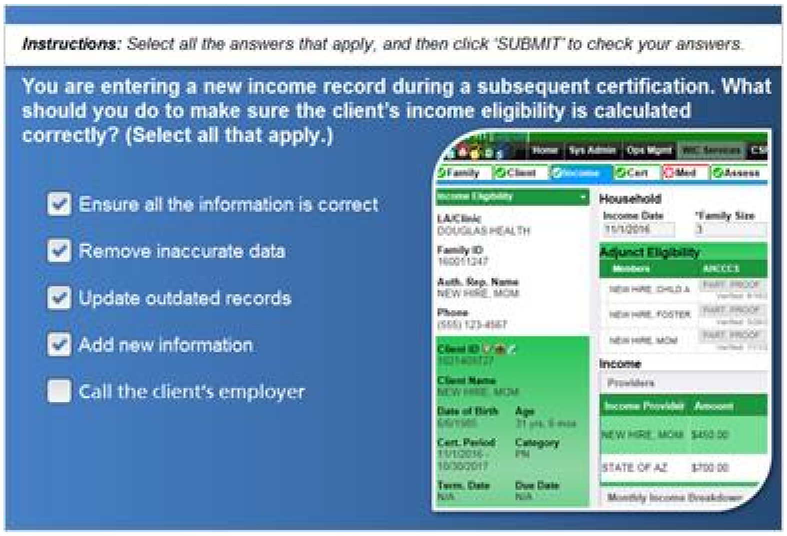
A (SLIDE LAYER)



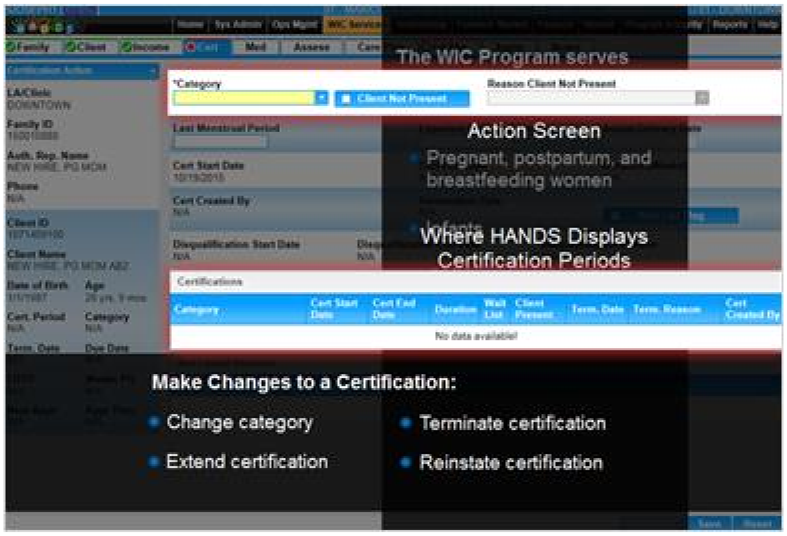
B (SLIDE LAYER)



3.13 SELF-CHECK - SUBSEQUENT CERTIFICATIONS AND UPDATES



3.14 CERTIFICATION ACTION



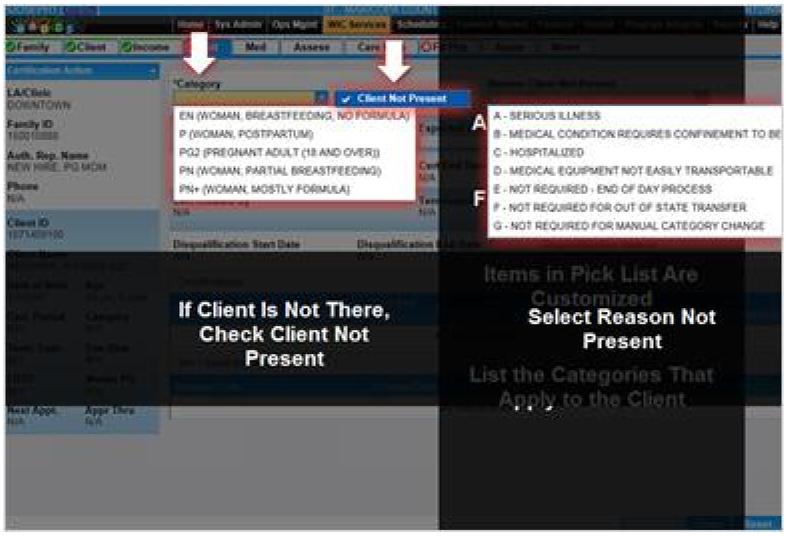
Notes:

The WIC Program serves certain categories of women, infants, and children. To be eligible for the program, a client must fall into one of these groups, which include pregnant, postpartum, and breastfeeding women, infants, and children up to age five.

In HANDS, document an applicant's category information on the Certification, or Cert, Action screen. This screen is where HANDS displays certification periods, or the length of time each client is eligible to receive services from the WIC program.

In addition, this is where you go to make changes to a person's certification information. These updates may include changing his or her category, and extending, terminating, or reinstating the client's certification period.

3.15 CERTIFICATION ACTION - NEW CERTIFICATION



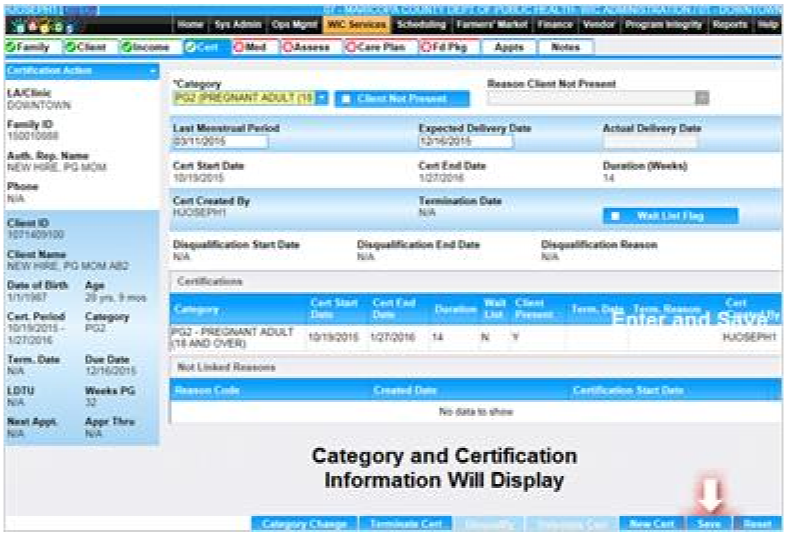
Notes:

When adding a new certification to HANDS, the first thing to do is select a category for your client using the Category pick list.

The items in the Category pick list are customized to list the categories that apply to the client. For example, if your client is a woman over the age of 18, you'll only see the categories for adult women in the pick list.

Next, if the client is not there for their certification, check the Client Not Present checkbox, and select the reason the client is not present from the pick list.

3.16 CERTIFICATION ACTION - NEW CERTIFICATION, CONTINUED



Notes:

The remaining fields you need to fill out on the screen may change a bit depending on the category you are certifying. The process, however, is the same.

Add date information either by selecting them from the calendar tool or by typing them into the field.

For our example, the applicant is a pregnant woman over the age of 18. Based on her category, you'll need to enter information into either the Last Menstrual Period field or the Expected Delivery Date field.

Entering the date into one of these fields will allow HANDS to calculate the information for the other field and vice versa.

Enter the information, and select Save. The client's category and certification information will display in the Certification grid on the screen.

3.17 CERTIFICATION ACTION - MOTHER AND INFANT/CHILD LINKAGE

Notes:

In Module 2, you learned about linking a mother to her kids using the Client Registration screen. Linking a mother to her children within HANDS ensures clients receive the benefits they need.

You know that in HANDS, you are required to either link mom to all of her children or to select a Reason Not Linked.

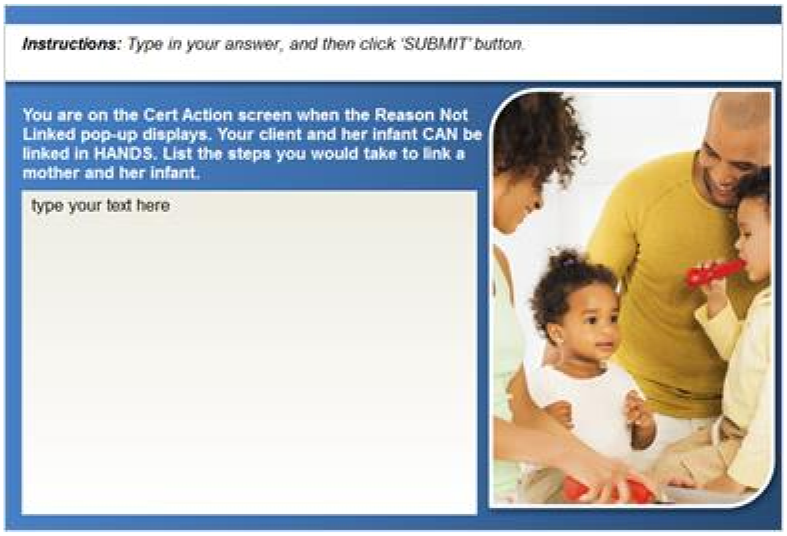
If you haven't linked a mother to her children on the Client Registration screen, a pop-up will appear on the Cert Action screen asking you to select a Reason Not Linked.

If a mother and her children can't be linked, select a Reason Not Linked from the pick list and then press the OK button. The information will display in the Not Linked Reasons grid.

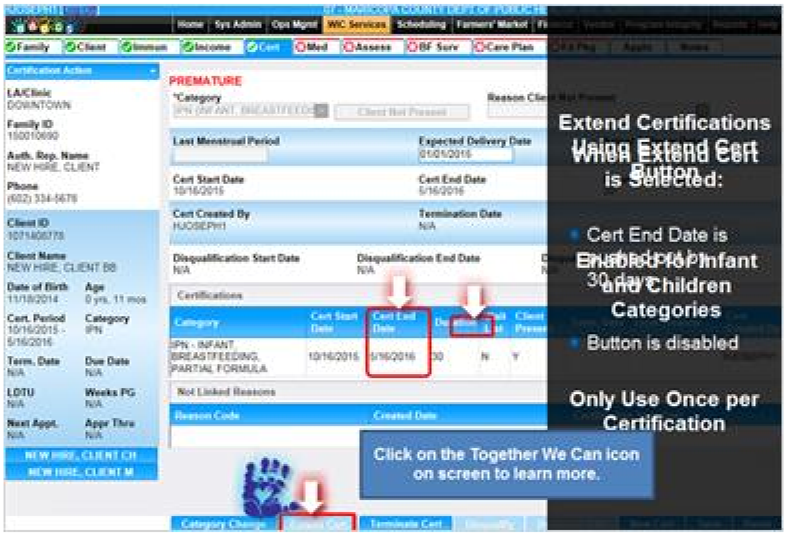
If they can be linked, choose the Link Client Manually button to close the pop-up. Then, go back to the Client Registration screen to link the clients using either the Mother's ID pick list or Mother outside of Family field.

If this process isn't completed, the system won't allow you to finalize the clients' certifications when you get to the Care Plan screen.

3.18 SELF-CHECK - MOTHER AND INFANT/CHILD LINKAGE



3.19 CERTIFICATION ACTION - UPDATES, EXTEND CERTIFICATION



Notes:

HANDS allows you to extend certifications using the Extend Cert button.

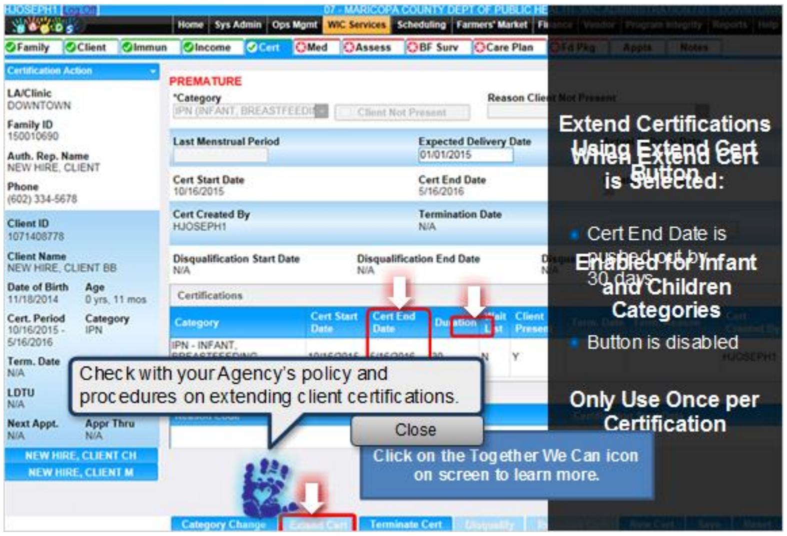
The button is enabled for infant and children Categories and can only be used once per certification.

When the Extend Cert button is selected, the client's Cert End Date is pushed out by 30 days.

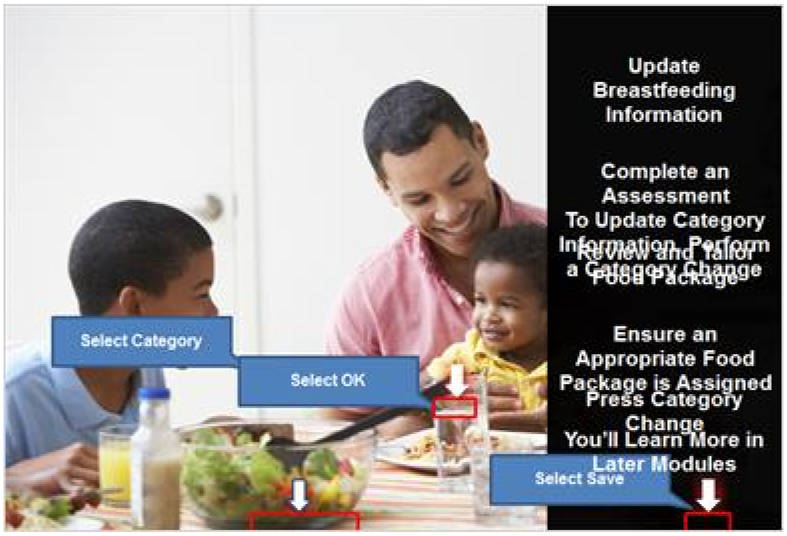
After it has been used, the button is disabled for the remainder of the client's certification.

Click on the Together We Can icon on screen to learn more.

A (SLIDE LAYER)



3.20 CERTIFICATION ACTION - UPDATES, CATEGORY CHANGE



Notes:

Breastfeeding and formula intake may change throughout a client's certification. This information needs to be captured in HANDS.

To update clients' category information during their certification, you'll perform a Category Change using the Cert Action screen.

Press the Category Change button to start the process. A new window will display. Select the new category from the pick list, then select OK. Select the Save button to update the client's certification record with the new category and certification information.

When you change a client's category, verify that the breastfeeding information in the client's record is accurate and update it if needed. You will also need to complete an assessment in order to determine and document the client's needs.

After you have completed the assessment, you will need to review and tailor the client's food package and ensure an appropriate package is assigned based on the client's age, needs, and new category.

You'll learn more about documenting breastfeeding information, completing Assessments, and Food Package Assignment in later modules.

3.21 CERTIFICATION ACTION - UPDATES, TERMINATION AND REINSTATEMENT

Notes:

Sometimes, you'll need to end a client's services before her certification period is over. This is referred to as a Termination.

If you need to terminate a client's certification period, press the Terminate Cert button on the Cert Action screen. A pop-up will display. Choose a reason from the Termination Code pick list, and then press the Terminate button.

Then, select whether or not you want to print the Notice of Ineligibility.

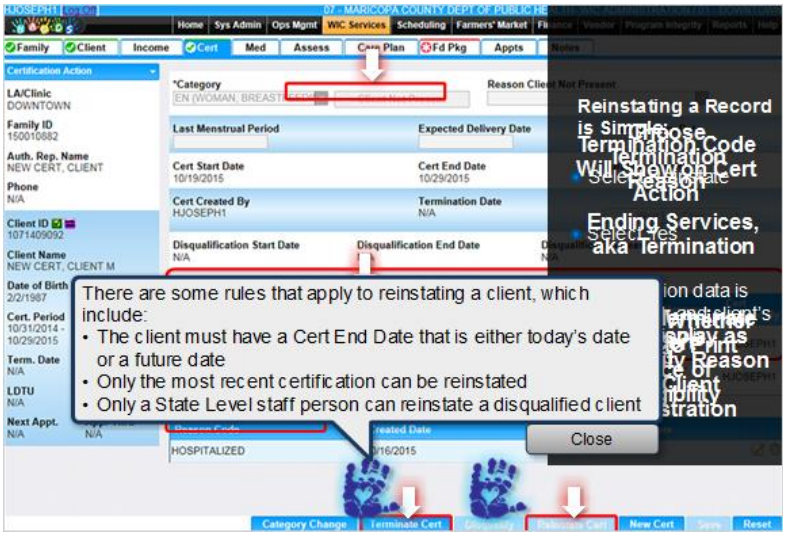
When you terminate a client's certification, the Termination Code that made them ineligible for services will show at the top of the Cert Action screen. The code will also be displayed as the Ineligibility Reason on the Client Registration screen.

Reinstating a client's certification record is a simple process. First, you'll select the Reinstate button on the Cert Action screen.

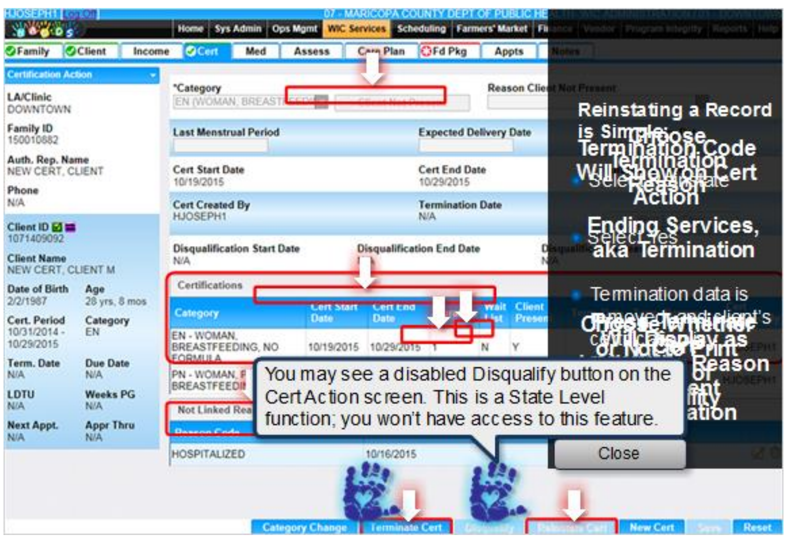
A pop-up will display asking if you want to reinstate the certification. Next, select the Yes button to remove the termination data, and reinstate the client's certification.

Click on the Together We Can icons on screen to learn more.

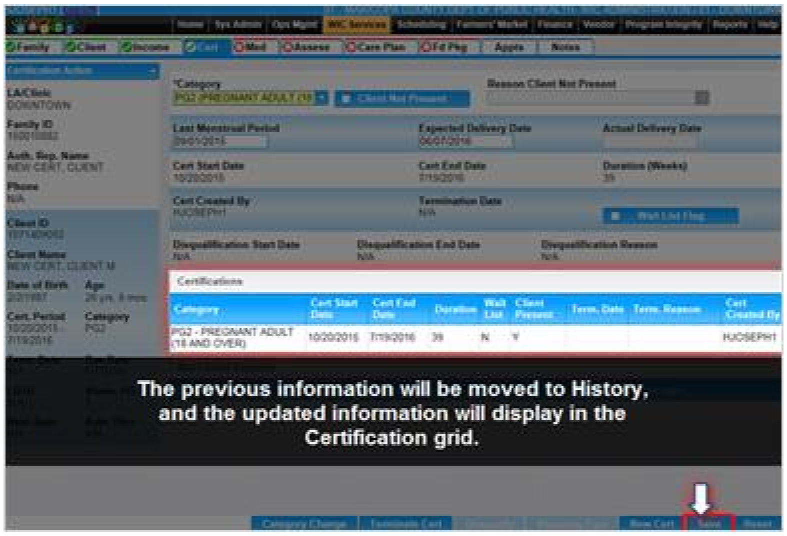
A (SLIDE LAYER)



B (SLIDE LAYER)



3.22 CERTIFICATION ACTION - SUBSEQUENT CERTIFICATIONS AND UPDATES



Notes:

During subsequent certifications, you'll need to enter new category information for the client. This can be done to a record that is no longer active or one that is within 30 days of the Cert End Date.

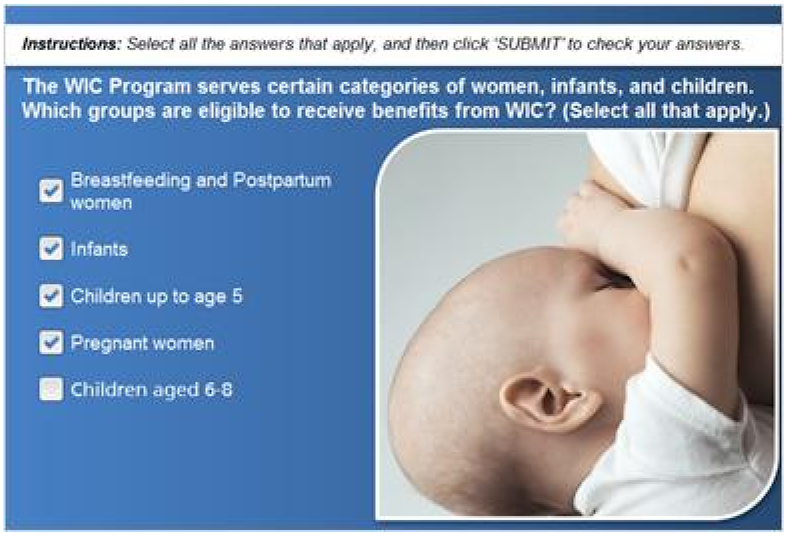
Before you enter category information, you'll need to verify and update previously entered information. This includes all instances of Proof of ID, contact information, including Proof of Address, Voter Registration, immunization status if your client is under two, and Income Eligibility information.

Select the New Cert button on the Cert Action screen once you have entered the required information on the other screens in the Certification Flow Menu.

Once you press the New Cert button, enter the information just as you would for a brand new client. Select the client's category, and enter the date or dates required.

After saving the new category information, the previous information will be moved to History, and the updated information will display in the Certification grid.

3.23 SELF-CHECK - CERTIFICATION ACTION



3.24 SUMMARY

Notes:

You’ve completed Module 3 of the HANDS New Hire course.

In this module, you learned how to document income and categorical eligibility.

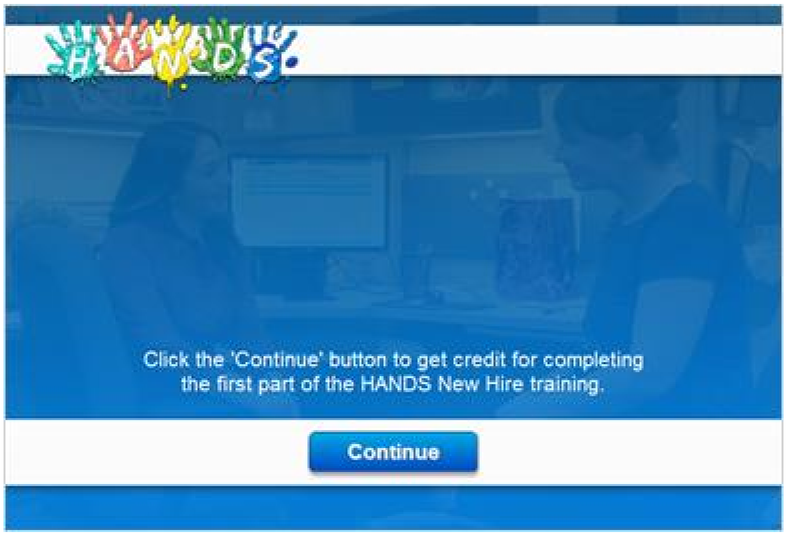
We found out about using the Income Eligibility screen to enter and update both adjunct and income provider information. You know about the Monthly Breakdown grid, documenting other important information, and how to collect signatures.

You learned about the Certification Action screen and how to document a client’s category information. You also learned how to extend, terminate, and reinstate a client’s certification period.

You also understand the importance of knowing your Agency’s policies and procedures regarding eligibility verification and documentation.

In the next module, we’ll cover the Medical Screen. We’ll look at how to collect medical information and review growth grids.

3.25 COMPLETION



Notes:

Click the 'Continue' button to get credit for completing the first part of the HAND's New Hire training.

3.26 CONGRATULATIONS

Notes:

You've completed Part 1 of the HANDS New Hire Training!

To get credit for the HANDS New Hire Training Part 1, you will need to pass the HANDS New Hire Part 1 Post-Test. Click the 'X' (upper right) to close this course and go back to the LMS where you can launch the Post-Test.