

ADHS WIC: HANDS New Hire Training Part 2

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 4 - ASSESSMENT PART 1

1.1 INTRODUCTION



Notes:

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

1.2 WELCOME



Notes:

So far, you've learned both the intake and the eligibility processes in HANDS. Now, you get to move on to client assessment, the area where you can let your amazing customer service skills truly shine.

During the client assessment, you'll use participant- centered service skills to show respect and build trust with participants.

You'll collect anthropometric and blood work information. You'll also use critical-thinking and active-listening skills to discover the health-related issues that concern your client the most.

Building this rapport enables you to offer support and assistance tailored to each client.

You'll use HANDS to document the information gathered from the client. This documentation will help provide consistent, quality care, and follow-up on your client's specific needs.

In this module, you'll learn about the first portion of the assessment.

You'll also learn about documenting medical information and viewing growth charts on the Medical screen.

1.3 STARTING THE ASSESSMENT

The screenshot shows the Hands! software interface for an assessment. The top navigation bar includes tabs for Home, Tys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, Reports, and Help. Below this is a sub-navigation bar with icons for Family, Client, Income, Cert, Med, Assess, Care Plan, Ed Pag, Apps, and Notes. The main window is titled 'Assessment' and displays client information on the left: LA/Clinic (DOUGLAS HEALTH), Family ID (160011247), Auth. Rep. Name (NEW HIRE, MOM), Phone ((555) 123-4567), Client ID (1021409727), Client Name (NEW HIRE, MOM), Date of Birth (6/6/1985), Age (31 yrs, 0 mos), Cert. Period (6/16/2016 - 3/8/2017), Category (PG2), Term Date (N/A), Due Date (12/25/2017), LDTU, and Weeks PG. The main content area is divided into sections: 'D: Diet and Nutrition' (listing 7 items: 1. Appetite, Likes, aversions, cravings; 2. Eating Patterns; 3. Vitamins/Supplements/Herbs; 4. Beverages/Water; 5. Milk Consumption and Type; 6. Food Safety; 7. Feelings and questions about breastfeeding), 'E: Environmental/Other Factors' (listing 3 items: 1. Smoking; 2. Drug or Alcohol Use; 3. Safety/Abuse), 'WIC Codes' (listing 4 items: 427.2 - CONSUMING A DIET VERY LOW IN CALORIES AND/OR ESSENTIAL NUTRIENTS; 427.3 - COMPULSIVELY INGESTING NON-FOOD ITEMS (PICA); 427.4 - NUTRITION DEFICIENCY; 427.5 - EXCESSIVE WEIGHT LOSS), and 'WIC Codes Summary' (listing 3 items: 335 - MATERNAL WEIGHT LOSS; 336 - DIAGNOSED TWINS OR MULTIPLE GESTATION; 337 - HISTORY OF PREMATURE DELIVERY). A large black box with white text reads: 'Other information will be documented using different screens.' At the bottom, there are buttons for Add, Clear, Clear All, Recalculate WIC Codes, Save, and Reset.

Notes:

The lab is where assessment begins. You'll discuss and document information about growth and blood work.

Collecting and assessing information about growth is very important as it may give you a sense of the client's nutritional and health status.

Blood work screens clients for risk of anemia, or low hemoglobin. Low hemoglobin can be due to a number of factors, including low iron intake.

A low value in either growth or blood work doesn't tell you what the problem may be. It indicates the need to collect more details using PCS skills.

Use the Medical screen to document the measurements collected in the lab. During discussion with the client, you may collect information relevant to other sections of the assessment, for example, client concerns regarding clinical or environmental factors from sections C and E in the A, B, C, D, E

Assessment Guide. These items will be documented using different screens and will be discussed later in the course.

1.4 MEDICAL - SIGNATURE

The screenshot shows the 'Medical Get Signature' screen. On the left, there's a sidebar with client details: LA/Clinic (DOUGLAS HEALTH), Family ID (16811247), Client Name (NEW HIRE, MOM), Date of Birth (6/5/1985), Age (31 yrs, 2 mos), Cert. Period (6/16/2016 - 3/8/2017), Category (PG2), Term, Date (N/A), Due Date (1/25/2017), LDTU (N/A), Weeks PG (19), Next Appt. (8/29/2016), Appt. Thru (N/A), and Wait Listed On (N/A). The main area contains a consent statement: 'I agree to allow WIC staff to take height, weight, and screen for anemia for me and for my children. I also give permission for WIC staff to physically touch me or my child if I request breastfeeding assistance.' Below this is a signature pad with a 'Clear' button and an 'OK' button. A red box highlights the signature pad area, and a yellow box highlights the 'Signature Type' dropdown menu. A text overlay reads: 'After saving, signature information will display in the Signatures Grid.'

Signature Image	Signature Type	Signature Date	Collected By	Client ID	Comments
	Consent	08/29/2016	SSCHWEIT		

Notes:

The Authorized Rep must give permission before any measurements are taken. Document consent by collecting signatures on the Medical screen, just as you did on the Income Eligibility and Family Information screens.

Use the signature pad to document the Authorized Representative's understanding of his or her Rights and Obligations, and client consent, which allows staff to:

- Measure height and weight
- Collect hemoglobin
- Physically touch the client or her child during breastfeeding instruction

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

The Signature Type field will default to Consent, 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. When he or she is finished and everything is correct on the Signature Information screen, select Save. After saving, the signature information, including an image of the signature, will display in the Signatures grid.

1.5 WOMEN MEDICAL

LA Clinica
DOUGLAS HEALTH
Family ID
180011241
Auth. Rep. Name
NEW HIRE, MOH
Phone
(516) 423-4987
Client ID /
1821403727
Client Name
NEW HIRE, MOH
Date of Birth
8/6/1985 Age
31 yrs, 0 mos

Anthropometric Data

Date	Current Weight	Pre-Preg Wt	Weeks Gestation	Total Wt	Wt Change	Avg Wt	Wt at Delivery	Pending Lab Code	Multi-Post Flag
No data to show									

Blood Work Data

Date	HGB	HCT	Pending Lab Code	Weeks Gestation
No data to show				

The Women's Medical screen is divided into two sections:

- Anthropometric information
- Blood work information

Information required on the Medical screen may change based on the client category.

Notes:

The information required on the Medical screen may change based on the client category. For example, delivery information is included for postpartum women, but not women who are pregnant. The Women's Medical screen is divided into two sections, one for anthropometric information and the other for blood work information.

1.6 WOMEN MEDICAL - ANTHROPOMETRICS

The screenshot displays the HANDS software interface. At the top, a menu titled "Select Add Anthro to document:" lists five options: Height, Weight, Pre-pregnancy weight, Delivery weight, and Pregnancy with or delivery of multiples. Below this, the "Edit Anthro" form is visible, containing fields for "Medical Data Date" (3/6/16/2016), "Weight" (64 kg, 142 lbs), "Height" (165 cm, 5'5"), "Pre-Pregnancy Weight" (65 kg, 143 lbs), and "Delivery Weight" (kg). A red box highlights the "Together We Can" icon on the screen. A blue callout box points to the icon with the text: "Click on the Together We Can icon on screen to learn more." The "Example" button is located at the bottom right of the form.

Notes:

Let's talk about the Anthropometric Data section first.

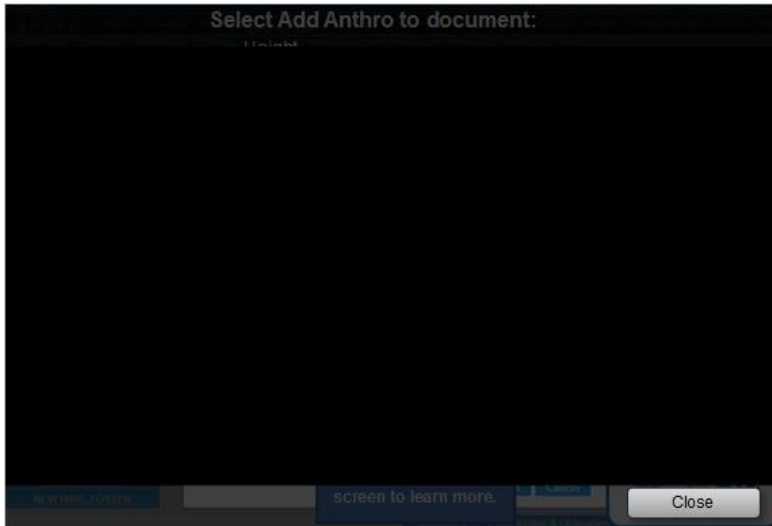
Select the Add Anthro button to document information for your client, including:

- Height
- Weight
- Pre-pregnancy weight
- Delivery weight
- Pregnancy with or delivery of multiples

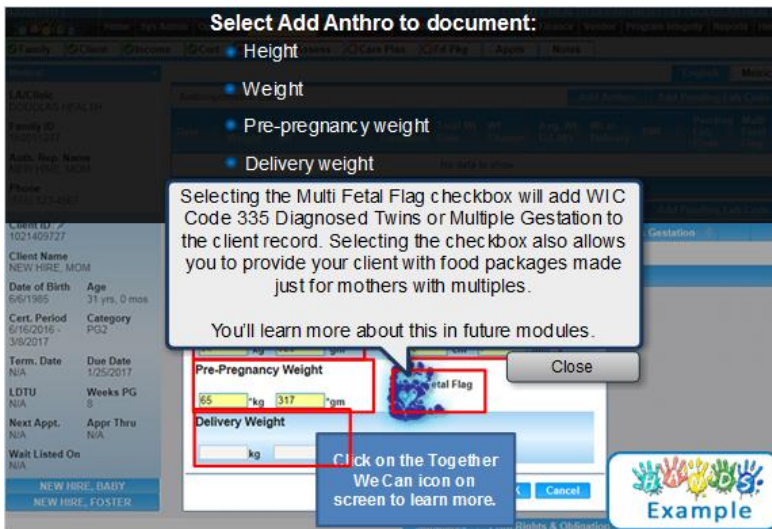
Throughout the course, you'll see an icon called the Together We Can icon, which will remind you to focus on the needs of the client. The Together We Can icon will be followed by either a Policy or a Participant Centered Services (PCS) tip. These tips will help you use HANDS to best serve the client.

To view an example of how adding anthropometric information for a pregnant woman looks using HANDS, click the Example button.

VIDEO EXAMPLE (SLIDE LAYER)



TOGETHER WE CAN (SLIDE LAYER)



1.7 WOMEN MEDICAL - BLOOD WORK

The screenshot displays the HANDS software interface for a client named NEW HIRE, MCM. The main section is titled 'Blood Work' and contains a table for 'Blood Work Data'. The table has columns for Date, HGB, HCT, and Weeks Gestation. A single row of data is visible for 06/16/2016, showing HGB of 9.6 and HCT of 28. The interface also includes a sidebar with client details and an 'Example' button at the bottom right.

Date	HGB	HCT	Weeks Gestation
06/16/2016	9.6	28	

Notes:

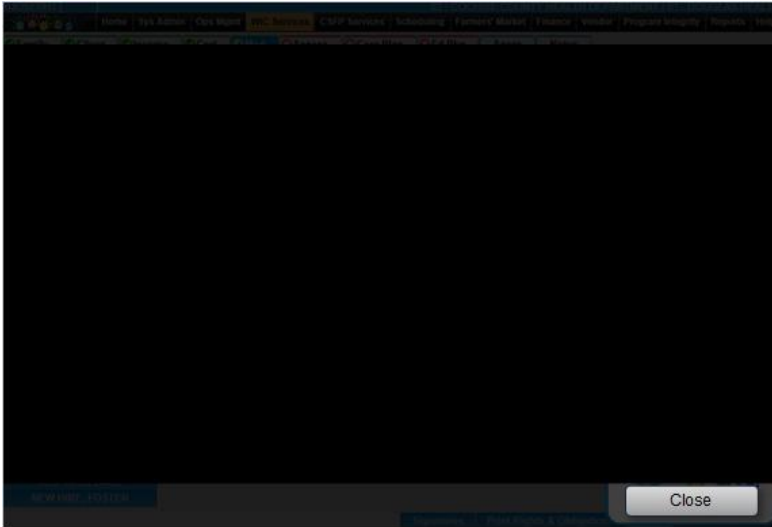
Next, enter the client's blood work information on the Blood Work Data grid. Select the Add Blood Work button to document either Hemoglobin (HGB) or Hematocrit (HCT).

This is also a great time to ask the rest of your A, B, C, and E questions. Asking while you document helps with appointment flow and building rapport with the client.

Select the Save button after you've finished entering information on the screen.

To view an example of how adding blood work information looks using HANDS, click the Example button.

VIDEO EXAMPLE (SLIDE LAYER)



1.8 WOMEN MEDICAL - DEFAULT MEASUREMENTS

The screenshot shows the HANDS Women Medical screen. The top navigation bar includes tabs for Home, My Admin, Opt Mgmt, HMC Services, CTRP Services, Scheduling, Patients' Market, Finance, Vendor, Program Integrity, Reports, and Help. Below this is a sub-navigation bar with tabs for Family, Client, Income, Cert, Med, Assess, Care Plan, Ed Plan, Apps, and Notes. The main content area is divided into two sections: 'Anthropometric Data' and 'Blood Work Data'. The 'Anthropometric Data' section has a table with columns for Date, Current Weight, Prev. Wt, Ht, Wt, Total Wt, Wt Change, Avg. Wt, Wt at Delivery, Prev. Lab Code, and Wt Loss Flag. The 'Blood Work Data' section has a table with columns for Date, HGB, HCT, Pending Lab Code, and Weeks Gestation. At the bottom, there is a text overlay that reads: 'View Existing Information in Metric', 'Select the Metric tab', 'to switch between the screens.', and 'Select the English Tab to Switch Back'. The overlay also includes a 'NEW HIRE, FOSTER' button and a 'Signatures' button.

Notes:

The English system of measurement is the default in HANDS for viewing and adding information. However, you have the option to view or add information using Metric measurements instead.

To add Metric measurements, select Metric on the Add pop-up before you enter the information.

View existing information in Metric measurements by selecting the Metric tab at the top of the Medical screen. You can switch back to English by selecting the English tab or refreshing your screen.

This option will not change the view on the main screen. You will still need to select Metric as discussed to add information using metric measurements.

Now you try it. Select the tabs on screen to switch from English to Metric.

ENGLISH (SLIDE LAYER)

The screenshot shows the English tab of the LA Clinic software. The left sidebar contains client information for 'NEW HIRE, MOM'. The main area displays 'Anthropometric Data' and 'Blood Work Data' tables. The 'Anthropometric Data' table has columns for Date, Current Weight, Pre-Preg Wt, Ht, Weeks Gestation, Total Wt Gain, Wt Change, Avg. Wt G/L/Wk, Wt at Delivery, BMI, Pending Lab Code, and Multi-Fetal Flag. The 'Blood Work Data' table has columns for Date, HGB, HCT, Pending Lab Code, and Weeks Gestation. Both tables show a row count of 10.

View Existing Information in Metric

Select the English and Metric tabs to switch between the screens.

Select the English Tab to Switch Back

METRIC (SLIDE LAYER)

The screenshot shows the Metric tab of the LA Clinic software. The left sidebar contains client information for 'NEW HIRE, MOM'. The main area displays 'Anthropometric Data' and 'Blood Work Data' tables. The 'Anthropometric Data' table has columns for Date, Current Weight, Pre-Preg Wt, Ht, Weeks Gestation, Total Wt Gain, Wt Change, Avg. Wt G/L/Wk, Wt at Delivery, BMI, Pending Lab Code, and Multi-Fetal Flag. The 'Blood Work Data' table has columns for Date, HGB, HCT, Pending Lab Code, and Weeks Gestation. Both tables show a row count of 10.

Select the English and Metric tabs to switch between the screens.

Select the English Tab to Switch Back

1.9 INFANT/CHILD MEDICAL

Birth Data

Weight lb oz Length in ft/in Gender

Anthropometric Data

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

Anthropometric Changes

Change From last Length or Ht/Age% Change From last Weight/Age% Change From last Weight/Length%

Blood Work Data

Date HGT WGT HCT Pending Lab Code

No data to show

Medical Screen is Different for Infants and Children

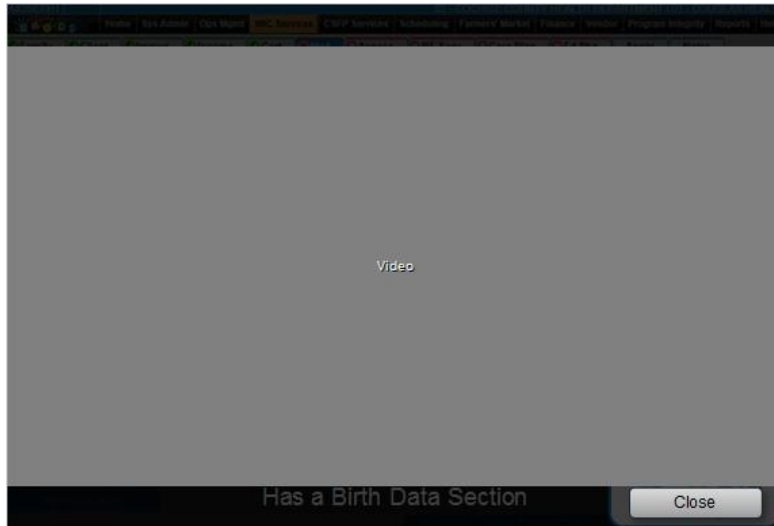
Has a Birth Data Section

Notes:

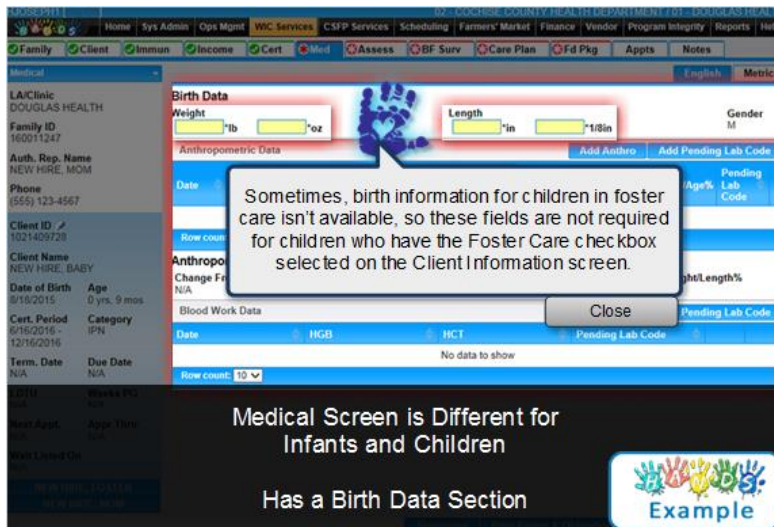
The Medical screen is a little bit different for infants and children than it is for women. The screen still has both the Anthropometric and the Blood Work sections; however, there is an additional section at the top of the screen. This section is titled Birth Data and is where you enter birth weight and length for clients under the age of two.

To view an example of how adding Birth Data on the Infant/Child Medical screen looks using HANDS, click the Example button.

VIDEO EXAMPLE (SLIDE LAYER)



TOGETHER WE CAN (SLIDE LAYER)



1.10 INFANT/CHILD MEDICAL - ANTHROPOMETRICS AND BLOODWORK

The screenshot shows the 'Add Anthropometric' screen in the HANDS software. At the top, a dark banner reads 'Less Anthropometric Information Is Required for Infants and Children'. Below this, the title 'Weight and Length/Height' is displayed, followed by the subtitle 'Recumbent or Standing'. The main form area has a red box highlighting the 'Medical Date Date' field (containing '06/16/2016'), the 'Recumbent or Standing' dropdown menu (with 'R' and 'S' buttons), and the 'Weight' field (with 'lb' and 'kg' units). To the right of the 'Weight' field is the 'Length or Height' field. A blue callout box with a hand icon says 'Click on the Together We Can icon on screen to learn more.' At the bottom right, there is a 'Together We Can' logo with the word 'Example' below it. On the left side of the screen, there is a sidebar with various patient information fields like 'Last Name', 'First Name', 'Date of Birth', etc.

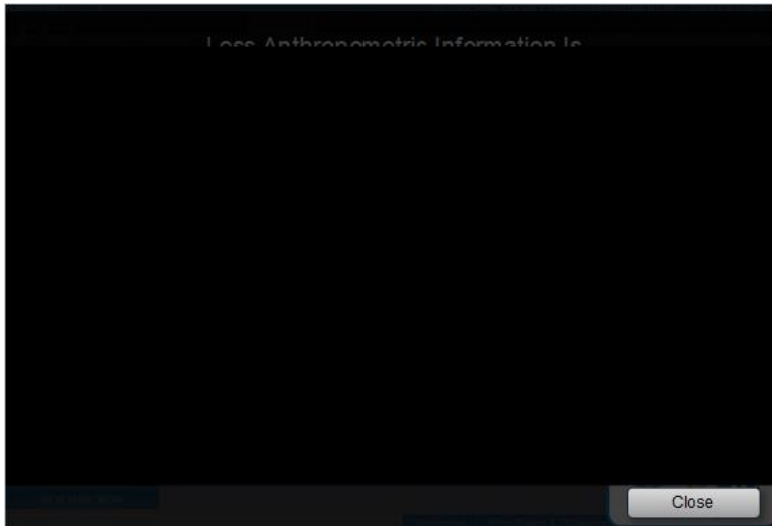
Notes:

Adding blood work and anthropometric information works the same for infants and children as it does for women; however, less anthropometric information is required for infants and children.

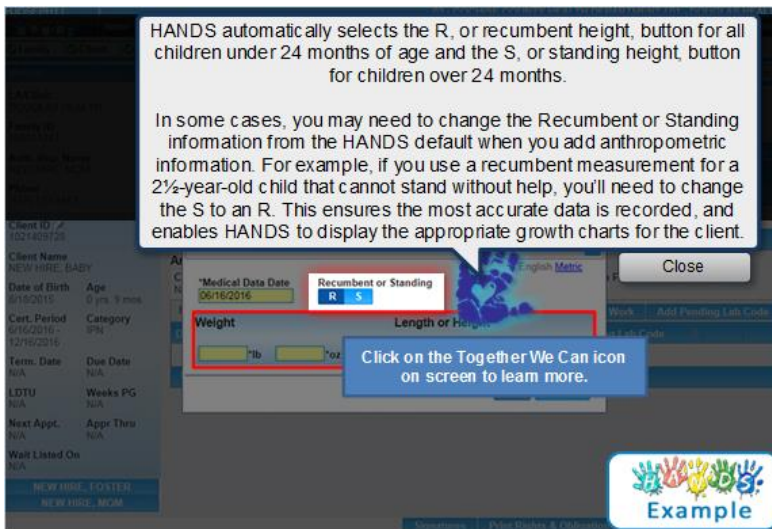
Enter two fields, Weight, and either Length or Height, depending on how the client was measured, then document whether you measured the recumbent length or standing height for the client using the R or S buttons.

To view an example of how adding anthropometric information for a child looks using HANDS, click the Example button.

VIDEO EXAMPLE (SLIDE LAYER)



TOGETHER WE CAN (SLIDE LAYER)



1.11 MEDICAL - PENDING LAB CODES



The screenshot displays the HANDS software interface. On the left, a family (a woman, a man, and two children) is shown preparing food in a kitchen. On the right, the software's 'Notes' section is visible, featuring a table with columns for 'Weight', 'gt%', 'DME', 'Mileage%', and 'Pending Lab Code'. The table contains one row of data: '57', '16.6', '62', and a blue icon. Below the table, there are buttons for 'Add Pending Lab Code' and 'Add Pending Lab Code'. A text box below the buttons reads: 'Click on the Together We Can icons on screen to learn more.' At the bottom right, there is a button labeled 'Example' with a colorful icon of hands.

Pending Lab Codes Affect the Number of Months of Food Benefits a Client Receives

If you are unsure or have questions about Pending Lab Codes, refer to your Anthropometric Manual, or talk with your trainer or supervisor.

Notes:

Sometimes, medical information isn't available, or cannot be gathered.

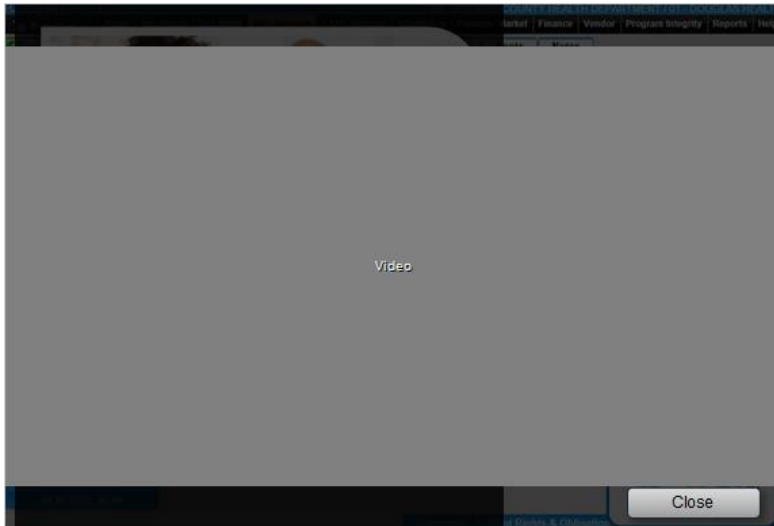
If this happens, use the Add Pending Lab Code button to document the reason that the information is not available. After selecting the appropriate code, select the OK button to add the information to the grid.

The selections for Pending Lab Codes are the same in both the Anthropometric and the Blood Work sections. It is important to select the correct code in each section because Pending Lab Codes affect the number of months of Food Benefits a client receives.

If you are unsure or have questions about Pending Lab Codes, refer to your Anthropometric Manual, or talk with your trainer or supervisor.

To view an example of how adding a Pending Lab Code looks using HANDS, click the Example button.

VIDEO EXAMPLE (SLIDE LAYER)



TOGETHER WE CAN (SLIDE LAYER)

Examples of when it's appropriate to use Pending Lab Codes include, but are not limited to, when a client or staff member's safety is at risk, when the client has a religious objection to lab measurements, or when the client is bringing measurements from their health care provider. If you are unsure or have questions about Pending Lab Codes, refer to your Anthropometric Manual, or talk with your trainer or supervisor.

Close

Example

1.12 SELF-CHECK - RECUMBENT OR STANDING?

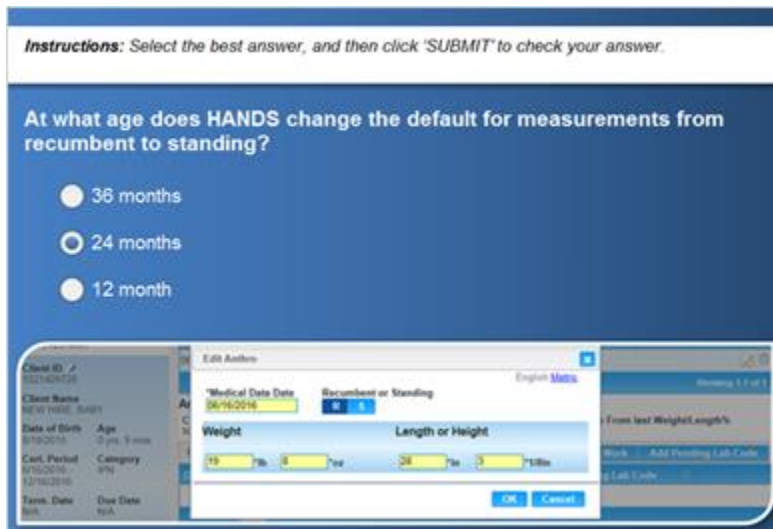
Instructions: Select the best answer, and then click 'SUBMIT' to check your answer.

At what age does HANDS change the default for measurements from recumbent to standing?

☐ 36 months

☐ 24 months

☐ 12 month



The screenshot shows a software interface with a blue header containing instructions. Below is a question about the age at which HANDS changes measurement defaults. Three radio button options are provided. At the bottom, there is a white data entry form with a sidebar on the left containing client information (Client ID, Name, Date of Birth, etc.) and a main area with fields for 'Medical Data Date', 'Recumbent or Standing' (with a dropdown menu), 'Weight', and 'Length or Height'. The form also includes 'OK' and 'Cancel' buttons.

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.

1.13 SELF-CHECK - PENDING LAB CODES

Instructions: Select the best answer(s), and then click 'SUBMIT' to check your answer(s).

When would you use a Pending Lab Code? (Select all that apply.)

- ☒ A client is going to bring blood work from their doctor
- ☒ Performing the test will cause physical harm to the participant
- ☐ When you're too busy to take measurements
- ☒ The client has a religious objection to lab measurements

Anthropometric Changes

Client ID: 00160729
Client Name: NEW HIRE, FONTER
Date of Birth: 01/13/2014
Age: 2 yrs, 3 mos
Cert. Period: 8/16/2016 - 8/16/2017
Category: C2
Taxes: Date: N/A
Due Date: N/A

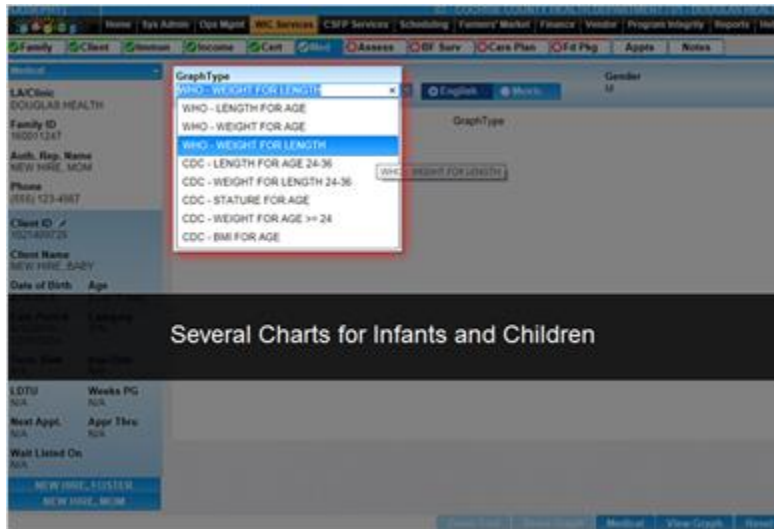
Change From last Length/Weight: N/A
Change From last Weight/Length: N/A

Add Pending Lab code

Medical Data Date: 06/16/2016
Pending Lab Code: [Dropdown Menu]

OK Cancel

1.14 MEDICAL - WEIGHT GAIN GRIDS AND GROWTH CHARTS



Notes:

The medical screen has graphs that show a client's growth over time. Gestational Weight Gain grids display for pregnant women, and several charts are available for infants and children. See the job aid in the resource section for full descriptions of each graph.

1.15 MEDICAL - GESTATIONAL WEIGHT GAIN GRID

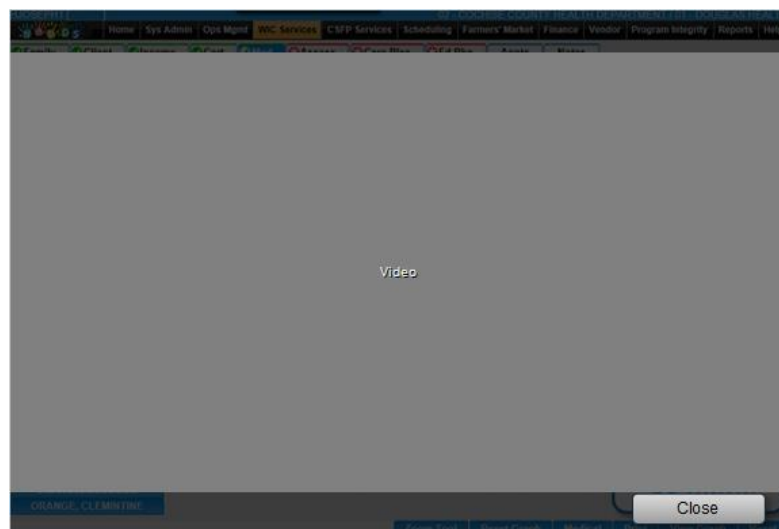


Notes:

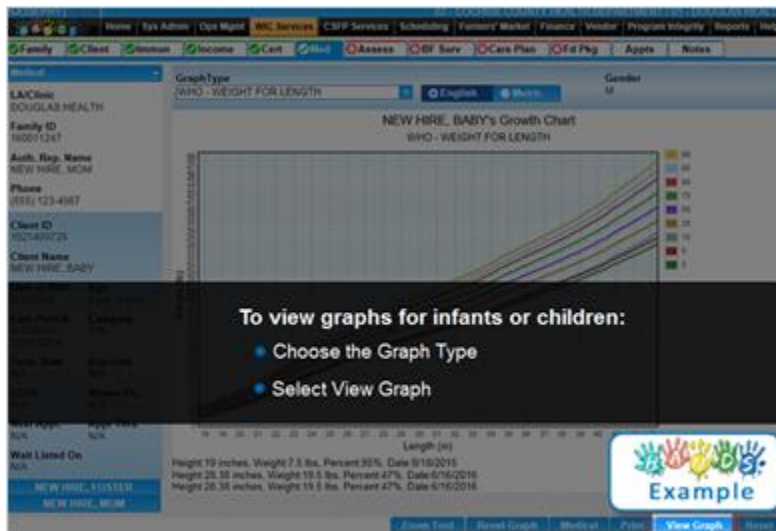
View a client's Gestational Weight Gain by selecting the Graphs button on the Medical screen. This will take you to the Graphs screen. Once there; choose the graph you want to view using the Graph Type pick list.

If a woman has previous pregnancy information in the system, weight gain grids from her previous pregnancies, in addition to the grid from her current pregnancy, are available. Choose the appropriate Expected Delivery Date from the list, and select the View Graph button. To watch an example of how to view a gestational weight gain grid in HANDS, click the Example button.

VIDEO EXAMPLE (SLIDE LAYER)



1.16 MEDICAL - GROWTH CHARTS FOR INFANTS AND CHILDREN



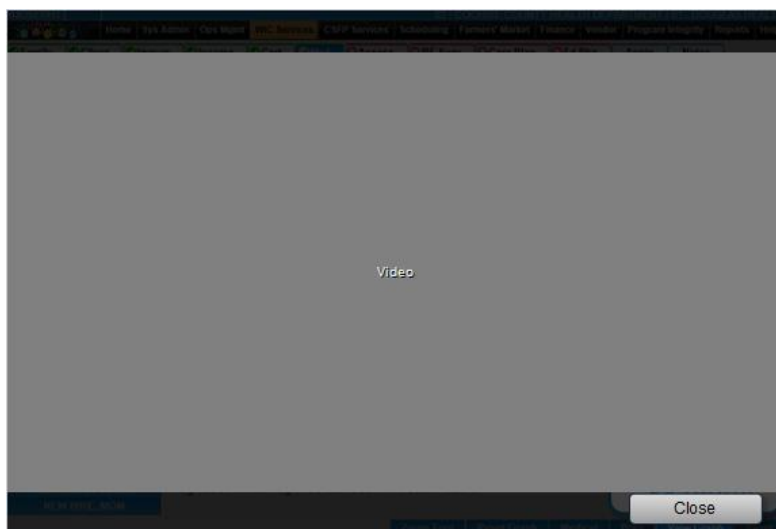
Notes:

Follow the same procedure to view growth charts for infants and children. Choose the growth chart to view from the pick list, and select the View Graph button to display the chart.

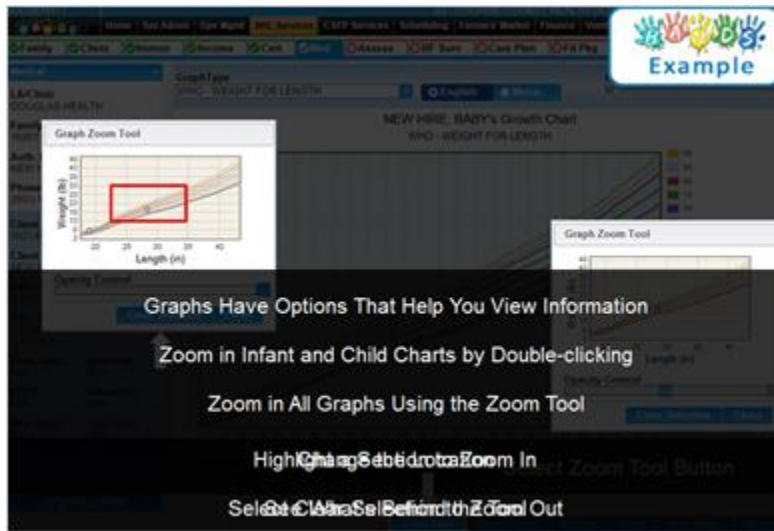
If you choose another growth chart from the pick list, or switch a chart from English to Metric, select the View Graph button again.

To watch an example of how to view a growth chart in HANDS, click the Example button.

VIDEO EXAMPLE (SLIDE LAYER)



1.17 MEDICAL - ZOOM TOOL



Notes:

HANDS graphs have a couple of options that help you view information.

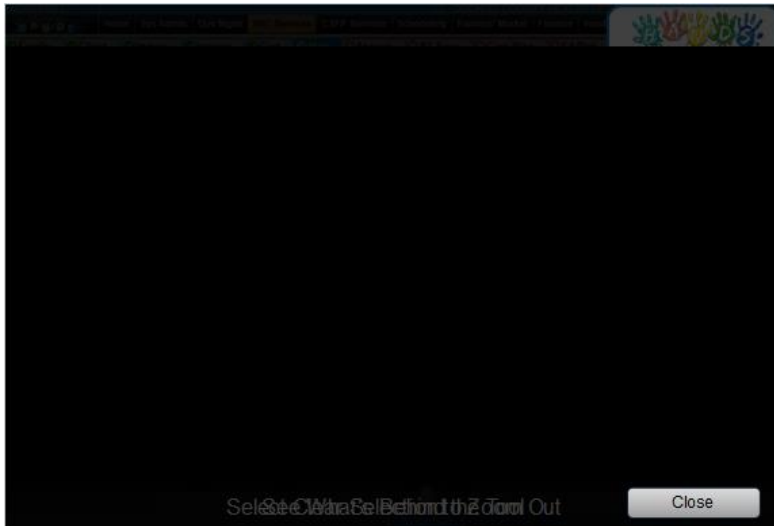
You can zoom in the infant and child growth charts by double-clicking on the area you want to see, and you can zoom in all graph types by using the Zoom Tool.

To open the tool, select the Zoom Tool button on the Graphs screen. Highlight a section on the tool to zoom in. Select the Clear Selection button to zoom out.

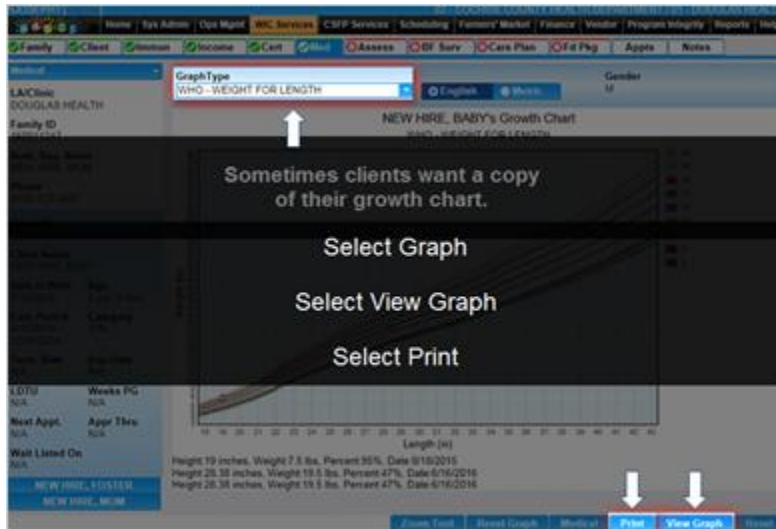
Change the location of the tool by dragging it to another section of the screen. You can also see what's behind the tool by sliding the opacity control.

To view an example of how the Zoom Tool works in HANDS, click the Example button.

VIDEO EXAMPLE (SLIDE LAYER)



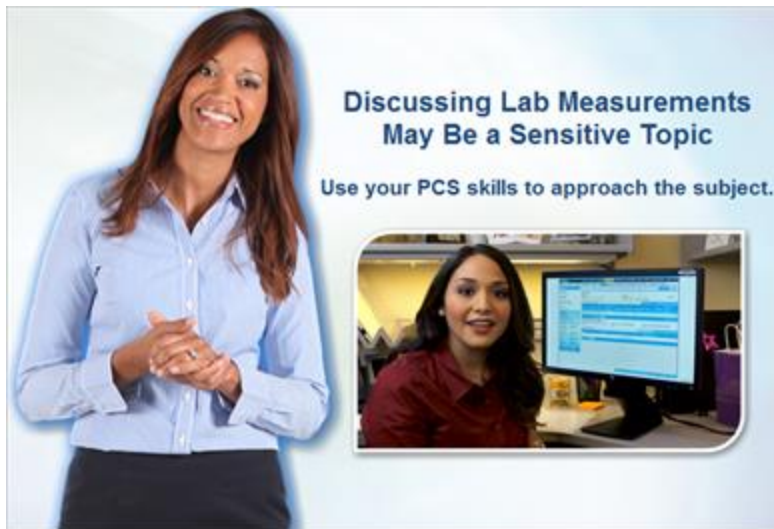
1.18 MEDICAL - PRINTING GRAPHS



Notes:

Sometimes clients want a copy of their growth chart. Select the graph and the View Graph button for the chart you want to give to the client, then select the Print button.

1.19 VIDEO SCENARIO - PCS SKILLS DURING THE ASSESSMENT



Notes:

Discussing the lab measurements you've collected can be hard for a client, as it may be a sensitive topic. It's important to use your PCS skills to approach the subject. Your skills will also come in handy when transitioning to the next part of the assessment.

Summarizing the information you've gathered so far and transitioning to the Dietary portion of the assessment takes practice. Watch the video to see how one staff member handles the discussion using her PCS skills.

You'll learn more about this during your Assessment course.

Lorena: So, from what you've told me so far, you feel everything is going well with Amaya. You said both you and your doctor are happy with her growth, is that correct?

Yvonne: Uh huh, her doctor said she's a very healthy baby. I think she's the same size Anthony was at her age.

Lorena: We use a tool called the growth grid to show how your baby is growing. I've entered Amaya's information into the computer. Would you be interested in seeing where she is on her growth grid today?

Yvonne: Yeah, that'd be great!

Lorena: *(Turns the screen to Yvonne and points out the chart)* So, most babies her age grow between here and here - and this is where Amaya is today. How do you feel about how she's growing?

Yvonne: It looks like she's right in the middle. So, that's good, right?

Lorena: She's completely within normal range - so you're happy with her growth. Are you happy with how she's eating?

Yvonne: Well we've started giving her some solids, um, she seems to like the avocado and bananas...
(the audio fades, the video blurs and jumps forward to later in the conversation)

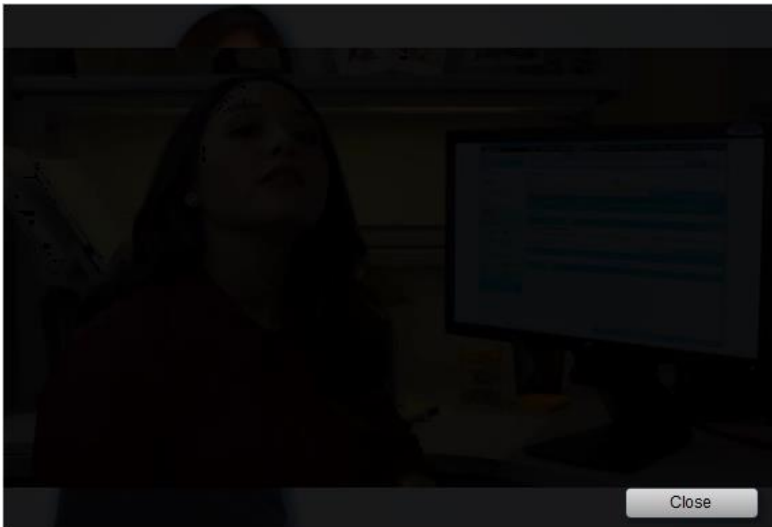
Lorena: So, I just want to do a quick review to make sure I have everything. So, Amaya is growing well, she's eating well and both you and your doctor are happy with her progress so far. You've started giving her solid food, and she seems to really like the bananas and avocados - so that's going well too. But you said she's been having some trouble sleeping, and you think it might be because she's hungry. So you said you've been adding cereal to her bottle at night, is that correct?

Yvonne: I've heard that adding cereal to the bottle is supposed to help them sleep better, but Amaya's still waking up.

Lorena: *(She makes a quick mark on her note tracker)* OK so you've been adding the cereal to the bottle, but you're not too sure if it's working - is there anything else about her eating that we've missed?

Yvonne: *(Shakes her head no)* No.

VIDEO EXAMPLE (SLIDE LAYER)



1.20 MEDICAL - SUBSEQUENT CERTIFICATIONS AND UPDATES

The screenshot displays a medical record interface for a client named ORANGE, CLEMENTINE. The interface includes a navigation bar at the top with various service categories. The main content area shows a table of anthropometric data with columns for Date, Weight, Lgh or Ht, Recumbent or Standing, HtAge%, WeightAge%, Weight ght%, BMI, and MetAge%. Two rows of data are visible, dated 06/21/2016 and 10/23/2014. Below the table, there is a section for 'Anthropometric Changes' showing percentage changes from the last measurement. At the bottom, a large dark box contains the text 'Verify and document based on your Agency's policies and procedures.' and three buttons: 'Take Measurements', 'Enter New Information', and 'Save as You Normally Would'.

Date	Weight	Lgh or Ht	Recumbent or Standing	HtAge%	WeightAge%	Weight ght%	BMI	MetAge%	Pending Lab Code
06/21/2016	41 lb 4 oz	41 6/8 in	3	52	52	77	16.6	77	
10/23/2014	32 lb 1 oz	30 2/8 in	3	57	57	97	24.6	97	

Anthropometric Changes

Change From last Length or HtAge%	Change From last WeightAge%	Change From last WeightLength%
85	6	-20

Verify and document based on your Agency's policies and procedures.

Take Measurements

Enter New Information

Save as You Normally Would

Notes:

Medical information is verified and documented based on your Agency's policies and procedures. After you take measurements in the lab, enter new medical information the same way you added the original information, then save as you normally would.

1.21 SUMMARY



Notes:

Congratulations! You've completed Module 4 of the HANDS New Hire course. In this module, you learned how to start the assessment process.

You learned about using the Medical screen to enter and update anthropometric and blood work information. You know how to view medical graphs for pregnant women, infants and children. You also understand the importance of connecting with your clients using your awesome participant-centered service skills.

In the next module, we'll continue with learning about the client assessment.

MODULE 5 - ASSESSMENT PART 2

2.1 ASSESSMENT, PART 2

The screenshot shows a web-based application interface for WIC services. The top navigation bar includes links like Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, Reports, and Help. Below this is a secondary navigation bar with tabs for Family, Client, Income, Cert, Med, Assess, Care Plan, and Notes. The main content area is titled 'Breastfeeding Surveillance' and contains several sections: 'Most Recent Surveillance Date' (06/16/2016), 'Is this infant/child currently breastfeeding?' (YES/NO buttons), 'Has this infant/child ever been breastfed?' (YES/NO buttons), 'How old was this infant/child when he/she completely stopped breastfeeding?' (Days, Weeks, Months input fields), 'Why did you stop breastfeeding?' (text area), and 'How old was this infant/child when he/she was first fed something other than breast milk?' (Most Applicable, Nothing Given buttons, Days, Weeks, Months input fields). On the left side, there is a sidebar with client information: LAClient DOUGLAS HEALTH, Family ID 160011247, Auth. Rep. Name NEW HIRE, MOM, Phone (565) 123-4567, Client ID 3021409728, Client Name NEW HIRE, SALLY, Date of Birth 01/16/2015, Age 0 yrs, 9 mos, Cert. Period 01/16/2016 - 12/16/2016, Term. Date N/A, Due Date N/A, and a list of recent appointments. At the bottom of the sidebar, there are buttons for 'NEW HIRE, FOSTER' and 'NEW HIRE, MOM'. The main content area has a large black banner with the text 'Breastfeeding Surveillance Screen' in white. At the bottom right of the main content area, there are buttons for 'Add', 'Save', and 'Reset'.

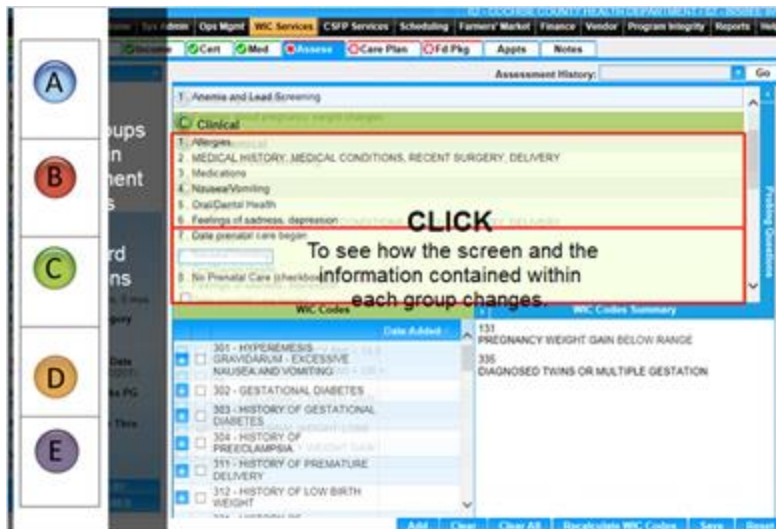
Notes:

Let's continue with the assessment process and learn how to document all of the valuable information you've gathered.

During the first portion of the assessment process, you collected anthropometric and biochemical measurements. You connected with your client to gather clinical, dietary, and other important information.

Now it's time to record the information gathered using your awesome PCS skills. This information is documented using several screens. In this module, you'll learn about two of those screens. The first is the Assessment screen, where WIC Codes are added to the client record. The second is the Breastfeeding Surveillance screen, where breastfeeding information for clients under two- years-old is documented.

2.2 ASSESSMENT - MAIN GROUPS



Notes:

There are four sections on the Assessment screen. Section one, located in the top-left of the screen, consists of the Main Groups, which are A - Anthropometric, B - Biochemical, C - Clinical, D - Diet and Nutrition, and E - Environmental and/or Other Factors.

Each Main Group is a different color and matches the A, B, C, D, E Guide. For example, Main Group B is red on both the Guide and the Assessment screen.

Each Main Group contains Assessment Topics, or general areas on which to focus. These groups may also have Standard Questions, which require you to enter information and may cause the assignment of WIC Codes.

Now explore the Main Groups. See how the screen and the information contained within each group changes by selecting the letter that corresponds with each Main Group.

1 (SLIDE LAYER)

COCHISE COUNTY HEALTH DEPARTMENT / 62 - BISBEE WIC

Assessment History: Go

A Anthropometric
1. Feelings about pregnancy weight changes

B Biochemical
1. Anemia and Lead Screening

C Clinical
1. Allergies
2. MEDICAL HISTORY: MEDICAL CONDITIONS, RECENT SURGERY, DELIVERY
3. Medications
4. Nausea/Vomiting
5. Oral/Dental Health
6. Feelings of sadness, depression
7. Date prenatal care began

WIC Codes

Code	Description	Date Added
<input type="checkbox"/> 101	PRE-PREGNANCY BMI < 18.5	
<input type="checkbox"/> 111	PRE-PREGNANCY BMI > OR = 25	
<input checked="" type="checkbox"/> 131	PREGNANCY WEIGHT GAIN BELOW RANGE	
<input type="checkbox"/> 132	MATERNAL WEIGHT LOSS	
<input type="checkbox"/> 133	PREGNANCY WEIGHT GAIN ABOVE RANGE	

WIC Codes Summary

Code	Description
131	PREGNANCY WEIGHT GAIN BELOW RANGE
335	DIAGNOSED TWINS OR MULTIPLE GESTATION

Close Add Clear Clear All Recalculate WIC Codes Save Reset

2 (SLIDE LAYER)

COCHISE COUNTY HEALTH DEPARTMENT / 62 - BISBEE WIC

Assessment History: Go

A Anthropometric
1. Feelings about pregnancy weight changes

B Biochemical
1. Anemia and Lead Screening

C Clinical
1. Allergies
2. MEDICAL HISTORY: MEDICAL CONDITIONS, RECENT SURGERY, DELIVERY
3. Medications
4. Nausea/Vomiting
5. Oral/Dental Health
6. Feelings of sadness, depression
7. Date prenatal care began

WIC Codes

Code	Description	Date Added
<input type="checkbox"/> 201	LOW HEMOGLOBIN / LOW HEMATOCRIT	
<input type="checkbox"/> 211	LEAD POISONING	

WIC Codes Summary

Code	Description
131	PREGNANCY WEIGHT GAIN BELOW RANGE
335	DIAGNOSED TWINS OR MULTIPLE GESTATION

Close Add Clear Clear All Recalculate WIC Codes Save Reset

3 (SLIDE LAYER)

The screenshot displays the 'WIC Services' assessment history for a user. The interface includes a top navigation bar with tabs for 'Income', 'Cert', 'Med', 'Assess', 'Care Plan', 'Fd Pkg', 'Appts', and 'Notes'. The 'Assess' tab is active, showing the 'Assessment History' section. On the left, a sidebar contains a vertical list of assessment categories: A (Allergies), B (Medical History), C (Clinical), D (Diet and Nutrition), and E (Environmental/Other Factors). The 'Clinical' section (C) is selected, displaying a list of clinical conditions and a table of WIC Codes. The 'WIC Codes' table has columns for 'Date Added' and 'WIC Codes Summary'. The 'WIC Codes Summary' table lists codes 131 and 335. The 'Clinical' section includes a list of clinical conditions: 1. Allergies, 2. MEDICAL HISTORY: MEDICAL CONDITIONS, RECENT SURGERY, DELIVERY, 3. Medications, 4. Nausea/Vomiting, 5. Oral/Dental Health, 6. Feelings of sadness, depression, 7. Date prenatal care began, and 8. No Prenatal Care (checkbox). The 'WIC Codes' table lists codes 301 through 312. The 'WIC Codes Summary' table lists codes 131 and 335. The 'Clinical' section includes a list of clinical conditions: 1. Allergies, 2. MEDICAL HISTORY: MEDICAL CONDITIONS, RECENT SURGERY, DELIVERY, 3. Medications, 4. Nausea/Vomiting, 5. Oral/Dental Health, 6. Feelings of sadness, depression, 7. Date prenatal care began, and 8. No Prenatal Care (checkbox). The 'WIC Codes' table lists codes 301 through 312. The 'WIC Codes Summary' table lists codes 131 and 335.

WIC Codes	Date Added	WIC Codes Summary
301 - HYPEREMESIS GRAVIDARUM - EXCESSIVE NAUSEA AND VOMITING		131 PREGNANCY WEIGHT GAIN BELOW RANGE
302 - GESTATIONAL DIABETES		335 DIAGNOSED TWINS OR MULTIPLE GESTATION
303 - HISTORY OF GESTATIONAL DIABETES		
304 - HISTORY OF PREECLAMPSIA		
311 - HISTORY OF PREMATURE DELIVERY		
312 - HISTORY OF LOW BIRTH WEIGHT		

4 (SLIDE LAYER)

The screenshot displays the 'WIC Services' assessment history for a user. The interface includes a top navigation bar with tabs for 'Income', 'Cert', 'Med', 'Assess', 'Care Plan', 'Fd Pkg', 'Appts', and 'Notes'. The 'Assess' tab is active, showing the 'Assessment History' section. On the left, a sidebar contains a vertical list of assessment categories: A (Allergies), B (Medical History), C (Clinical), D (Diet and Nutrition), and E (Environmental/Other Factors). The 'Diet and Nutrition' section (D) is selected, displaying a list of diet and nutrition conditions and a table of WIC Codes. The 'WIC Codes' table has columns for 'Date Added' and 'WIC Codes Summary'. The 'WIC Codes Summary' table lists codes 131 and 335. The 'Diet and Nutrition' section includes a list of diet and nutrition conditions: 1. Appetite: Likes, aversions, cravings, 2. Eating Patterns, 3. Vitamins/Supplements/Herbs, 4. Beverages/Water, 5. Milk Consumption and Type, 6. Food Safety, and 7. Feelings and questions about breastfeeding. The 'WIC Codes' table lists codes 401 through 427. The 'WIC Codes Summary' table lists codes 131 and 335.

WIC Codes	Date Added	WIC Codes Summary
401 - FAILURE TO MEET DIETARY GUIDELINES FOR AMERICANS		131 PREGNANCY WEIGHT GAIN BELOW RANGE
427.1 - CONSUMING DIETARY SUPPLEMENTS WITH POTENTIALLY HARMFUL CONSEQUENCES		335 DIAGNOSED TWINS OR MULTIPLE GESTATION
427.2 - CONSUMING A DIET VERY LOW IN CALORIES AND/OR ESSENTIAL NUTRIENTS		
427.3 - COMPULSIVELY INGESTING NON-FOOD ITEMS (PICA)		
427.4 - INADEQUATE NUTRITION		

5 (SLIDE LAYER)

COCHISE COUNTY HEALTH DEPARTMENT / 62 - SISSEE WIC

Income Cert Med Assess Care Plan Fd Pkg Appts Notes

Assessment History: Go

D Diet and Nutrition

1. Appetite: Likes, aversions, cravings
2. Eating Patterns
3. Vitamins/Supplements/Herbs
4. Beverages/Water
5. Milk Consumption and Type
6. Food Safety
7. Feelings and questions about breastfeeding

E Environmental/Other Factors

1. Smoking
2. Drug or Alcohol Use
3. Safety/Abuse

WIC Codes

	Date Added
<input type="checkbox"/> 502 - TRANSFER OF CERTIFICATION	
<input type="checkbox"/> 503 - PRESUMPTIVE ELIGIBILITY FOR PREGNANT WOMEN	
<input type="checkbox"/> 801 - HOMELESSNESS	
<input type="checkbox"/> 802 - MIGRANCY	
<input type="checkbox"/> 901 - RECIPIENT OF ABUSE	
<input type="checkbox"/> 902 - WOMAN OR INFANT/CHILD OF PRIMARY CAREGIVER WITH LIMITED ABILITY	
<input type="checkbox"/> 903 - FOSTER/CARE	

WIC Codes Summary

131	PREGNANCY WEIGHT GAIN BELOW RANGE
335	DIAGNOSED TWINS OR MULTIPLE GESTATION

Add Clear Clear All Recalculate WIC Codes Save Reset

Close

2.3 ASSESSMENT - STANDARD QUESTIONS

The screenshot displays the WIC Services Assessment interface. On the left, a sidebar contains client information for L.A. Kelle, Family ID 160011247, and Client ID 1521409727. The main area is divided into two sections. The top section, titled 'Assessment History', contains a large black box with the text 'Entered Directly on the Screen' and 'Answered for Each Assessment'. Below this, the 'WIC Codes' section lists various conditions with checkboxes and dates. The 'WIC Codes Summary' section on the right lists specific codes and their descriptions. An 'Example' button is visible in the bottom right corner.

WIC Codes	Date Added
<input type="checkbox"/> 301 - HYPEREMESIS GRAVIDARUM - EXCESSIVE NAUSEA AND VOMITING	
<input type="checkbox"/> 302 - GESTATIONAL DIABETES	
<input type="checkbox"/> 303 - HISTORY OF GESTATIONAL DIABETES	
<input type="checkbox"/> 304 - HISTORY OF PREECLAMPSIA	
<input type="checkbox"/> 311 - HISTORY OF PREMATURE DELIVERY	6/16/2016
<input type="checkbox"/> 312 - HISTORY OF LOW BIRTH WEIGHT	

WIC Codes Summary
132 - 6/16/2016 MATERNAL WEIGHT LOSS
311 - 6/16/2016 HISTORY OF PREMATURE DELIVERY
321 - 6/16/2016 HISTORY OF SPONTANEOUS ABORTIONS, FETAL OR NEONATAL LOSS
332 - 6/16/2016 CLOSELY SPACED PREGNANCY, CONCEPTION BEFORE 18 MONTHS POST
336 - 6/16/2016 DIAGNOSED TWINS OR MORE
427.4 - 6/16/2016

Notes:

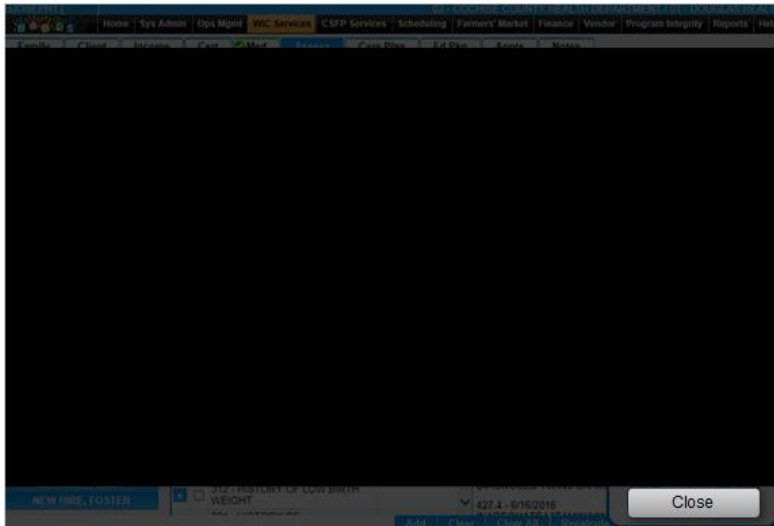
Some assessments may contain what are referred to as Standard Questions. Standard Questions change based on the client category, and cover topics from infant feeding to prenatal care.

The information gathered from the questions may be included in your notes and, depending on how they're answered, may cause the system to assign a WIC Code to the client's record.

The answers to the Standard Questions are entered directly into the fields on the screen and will need to be answered each time a new assessment is added.

To view an example of how completing Standard Questions on the Assessment screen looks using HANDS, click the Example button.

VIDEO EXAMPLE (SLIDE LAYER)



2.4 ASSESSMENT - WIC CODES

The screenshot shows the 'Assessment' screen in the HANDS system. The left sidebar contains client information: LA/Claire BISHOP WIC, Family ID 16011299, Auth. Rep. Name TREE, PEACH, Phone (565) 123-4567, Client ID 2021409022, Client Name TREE, PEACH A, Date of Birth 1/1/1987, Age 29 yrs, 6 mos, Cert. Period 4/15/2016 - 1/29/2017, Category PG2, Term. Date 12/17/2016, Due Date 12/17/2016, LDTU N/A, Weeks PG 20, Next Appr. N/A, Appr Thru N/A.

The main area is divided into three sections: Anthropometric, Biochemical, and Clinical. The Clinical section is expanded, showing a list of medical conditions and symptoms. Below this, the 'WIC Codes' section is highlighted with a red box. It contains a table with columns 'WIC Codes' and 'Date Added'. The table lists several codes: 131 - PRE-PREGNANCY BMI < 18.5, 111 - PRE-PREGNANCY BMI > OR = 25, 131 - PREGNANCY WEIGHT GAIN BELOW RANGE, and 132 - MATERNAL WEIGHT LOSS. To the right of the table is a 'WIC Codes Summary' section showing '131 PREGNANCY WEIGHT GAIN BELOW RANGE'.

At the bottom of the screen, a black banner with white text reads: 'If a WIC Code Is Incorrect, Change the Data Before Assessment Is Completed'. Below the banner are buttons for 'Add', 'Clear', 'Clear All', 'Recalculate WIC Codes', 'Save', and 'Cancel'.

Notes:

Section two, located in the bottom-left of the screen, is the WIC Codes section. This section displays WIC Codes associated with the Main Group you have selected.

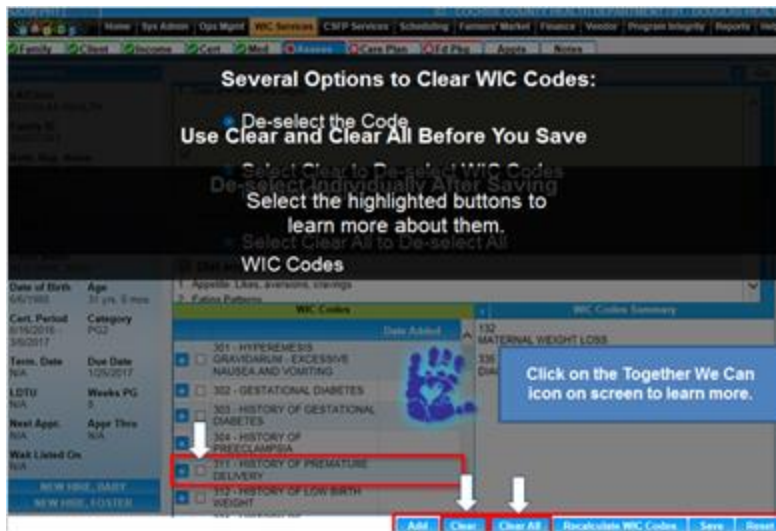
Notice that the header changes color based on the Main Group you have selected for easy identification of the section you are on. For example, the header will be red if you select B in the Main Group section.

What if you need more information about a WIC Code? Select the blue plus sign next to the WIC Code to expand the section. If there is additional information available for a WIC Code, it will be listed here. Use the WIC Nutrition Risk Manual for more in-depth information.

In HANDS, the system will assign WIC Codes based on the information entered on different screens. For example, the client seen here has the Multi Fetal Flag selected on the Medical screen, which assigns WIC Code 335 - Diagnosed Twins or Multiple Gestation.

System-assigned WIC Codes are read only, and can't be de-selected. However, if you think a system-assigned WIC Code is incorrect, you have the option to go back and change the data that caused the code to be assigned. This needs to be done before completing the assessment, which we will discuss in the next module.

2.5 ASSESSMENT - ADD WIC CODES



Notes:

The WIC Code section is where WIC Codes are selected based on the A, B, C, D, E conversations with the client. To add a WIC Code to the client's record, first select the appropriate Main Group. Then select the checkbox next to the WIC Code you wish to add to the client's record.

What if you need to clear WIC Codes? There are several options for clearing the selected WIC Codes. These actions only work on codes you have added to the record, and won't work on system-assigned codes. To de-select a single code, select the checkbox again.

To de-select all codes in the Main Group you are working with, select the Clear button.

To de-select all of the WIC Codes on the Assessment screen, select the Clear All button.

The Clear and Clear All buttons only work before the assessment is saved. After saving, WIC Codes need to be de-selected individually.

There are several buttons to choose from on the Assessment screen. Select a button to learn more about it.

TOGETHER (SLIDE LAYER)

Several Options to Clear WIC Codes:

- De-select the Code
- Use Clear and Clear All Before You Save**
- Select Clear to De-select WIC Codes
- De-select Individually After Saving

To help make assigning codes easier, use the WIC Code Cheat Sheets which have WIC Code information and cut-offs for each category.

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

Buttons at the bottom: Add, Clear, Clear All, Recalculate WIC Codes, Save, Reset.

01 (SLIDE LAYER)

Several Options to Clear WIC Codes:

- De-select the Code
- Use Clear and Clear All Before You Save**
- Select Clear to De-select WIC Codes
- De-select Individually After Saving
- Select the highlighted buttons to learn more about them.
- Select Clear All to De-select All WIC Codes

Add Button: Adds a new assessment record.

Note: This is only needed when adding additional assessments, for example, at Mid-Cert.

Buttons at the bottom: Add, Clear, Clear All, Recalculate WIC Codes, Save, Reset.

02 (SLIDE LAYER)

Several Options to Clear WIC Codes:

- De-select the Code
- Use Clear and Clear All Before You Save**
- Select Clear to De-select WIC Codes
- De-select Individually After Saving
- Select the highlighted buttons to learn more about them.
- Select Clear All to De-select All

WIC Codes

Clear Button: Clears the WIC Codes from the selected section.

Note: Won't clear the system-generated WIC Codes. Items won't be cleared if changes have been saved.

The screenshot shows the 'WIC Codes' section of the software interface. A slide layer is overlaid on the screen, providing instructions on how to clear WIC codes. The slide layer includes a list of options, a description of the 'Clear' button, and a note about system-generated codes. The 'Clear' button is highlighted in the interface.

03 (SLIDE LAYER)

Several Options to Clear WIC Codes:

- De-select the Code
- Use Clear and Clear All Before You Save**
- Select Clear to De-select WIC Codes
- De-select Individually After Saving
- Select the highlighted buttons to learn more about them.
- Select Clear All to De-select All

WIC Codes

Clear All Button: Clears all the selected WIC Codes on the Assessment screen.

Note: Won't clear the system-generated WIC Codes. Items won't be cleared if changes have been saved.

The screenshot shows the 'WIC Codes' section of the software interface. A slide layer is overlaid on the screen, providing instructions on how to clear WIC codes. The slide layer includes a list of options, a description of the 'Clear All' button, and a note about system-generated codes. The 'Clear All' button is highlighted in the interface.

04 (SLIDE LAYER)

Several Options to Clear WIC Codes:

- De-select the Code
- Use Clear and Clear All Before You Save**
- Select Clear to De-select WIC Codes
- De-select Individually After Saving
- Select the highlighted buttons to learn more about them.
- Select Clear All to De-select All

WIC Codes

1. Appetite, Likes, aversions, cravings
2. Fatigue Patterns

WIC Codes Summary

301 - HYPEREMESIS
302 - GRAVIDARUM - EXCESSIVE NAUSEA AND VOMITING
303 - GESTATIONAL DIABETES
304 - HISTORY OF LOW BIRTH WEIGHT

132 MATERNAL WEIGHT LOSS

Close

Save Button: Saves the assessment to the client record.

Note: WIC Codes are not formally added to the client's record until the Complete Assessment button is pressed on the Care Plan screen.

Add Clear Clear All Recalculate WIC Codes Save Reset

05 (SLIDE LAYER)

Several Options to Clear WIC Codes:

- De-select the Code
- Use Clear and Clear All Before You Save**
- Select Clear to De-select WIC Codes
- De-select Individually After Saving
- Select the highlighted buttons to learn more about them.
- Select Clear All to De-select All

WIC Codes

1. Appetite, Likes, aversions, cravings
2. Fatigue Patterns

WIC Codes Summary

301 - HYPEREMESIS
302 - GRAVIDARUM - EXCESSIVE NAUSEA AND VOMITING
303 - GESTATIONAL DIABETES
304 - HISTORY OF LOW BIRTH WEIGHT

132 MATERNAL WEIGHT LOSS

335 DIA

Close

Can more.

Recalculate WIC Codes Button: Not used at this time.

Add Clear Clear All Recalculate WIC Codes Save Reset

06 (SLIDE LAYER)

Several Options to Clear WIC Codes:

- De-select the Code
- Use Clear and Clear All Before You Save
- Select Clear to De-select WIC Codes
- De-select Individually After Saving
- Select the highlighted buttons to learn more about them.
- Select Clear All to De-select All

WIC Codes

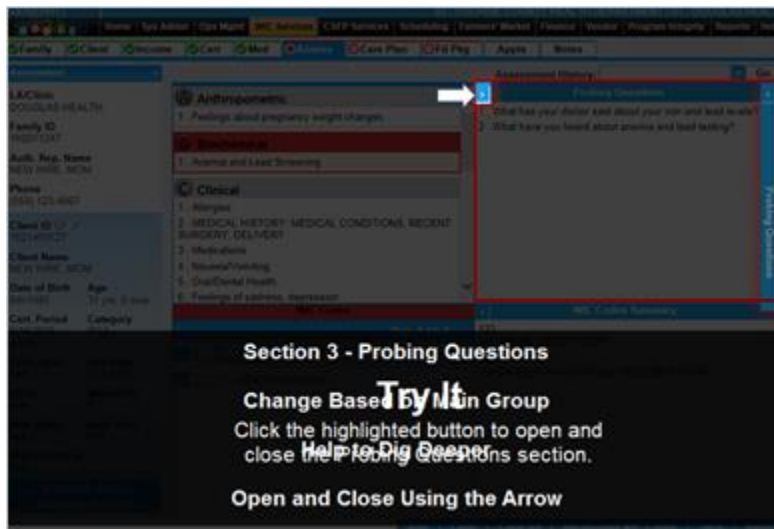
Click on the Tool

Reset Button: Returns the assessment back to the original view without saving changes.

Buttons: Add, Clear, Clear All, Recalculate WIC Codes, Save, Reset

The screenshot shows a software interface for WIC Services. A slide layer is overlaid on the screen, providing instructions on how to clear WIC codes. The slide layer lists several options: de-selecting the code, using Clear and Clear All before saving, selecting Clear to de-select WIC codes, de-selecting individually after saving, selecting the highlighted buttons to learn more, and selecting Clear All to de-select all. It also includes a 'Reset Button' description: 'Returns the assessment back to the original view without saving changes.' The background interface shows a patient record with various fields like Date of Birth, Age, and WIC Codes. At the bottom, there are buttons for Add, Clear, Clear All, Recalculate WIC Codes, Save, and Reset.

2.6 ASSESSMENT - PROBING QUESTIONS



Notes:

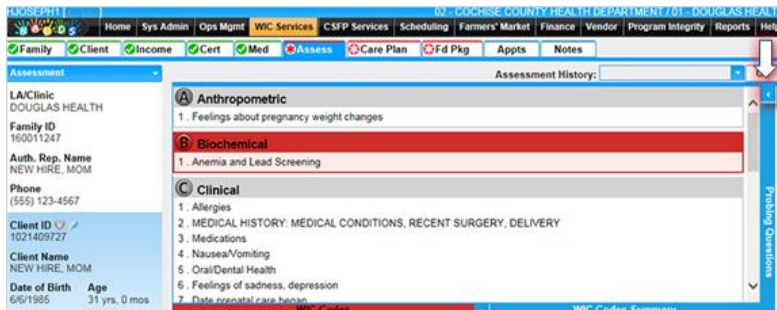
Section three, which is hidden in the top-right of the screen, contains Probing Questions. Like the WIC Codes, the questions in this section change based on the Main Group selected.

Probing Questions are there in case you need a little extra help digging deeper into Assessment Topics with your client.

You can open and close the Probing Questions section using the small white arrow located in the upper-left corner of the section.

Go ahead and give it a try, click the highlighted button to open and close the Probing Questions section.

01 (SLIDE LAYER)



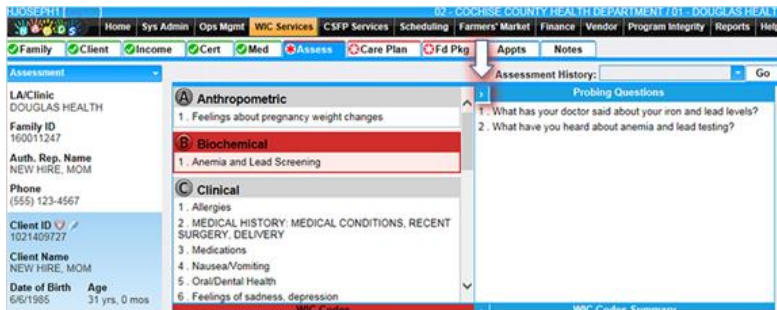
Section 3 - Probing Questions

Change Based on Main Group

Click the highlighted button to open and close the Probing Questions section.

Open and Close Using the Arrow

02 (SLIDE LAYER)



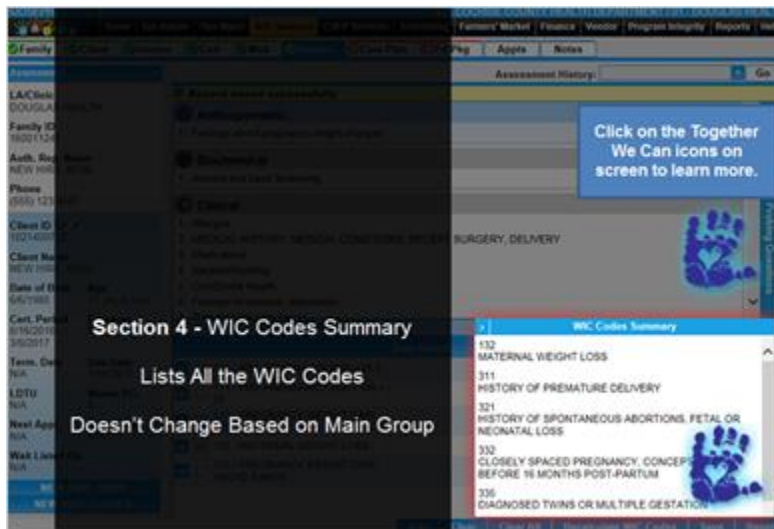
Section 3 - Probing Questions

Change Based on Main Group

Click the highlighted button to open and close the Probing Questions section.

Open and Close Using the Arrow

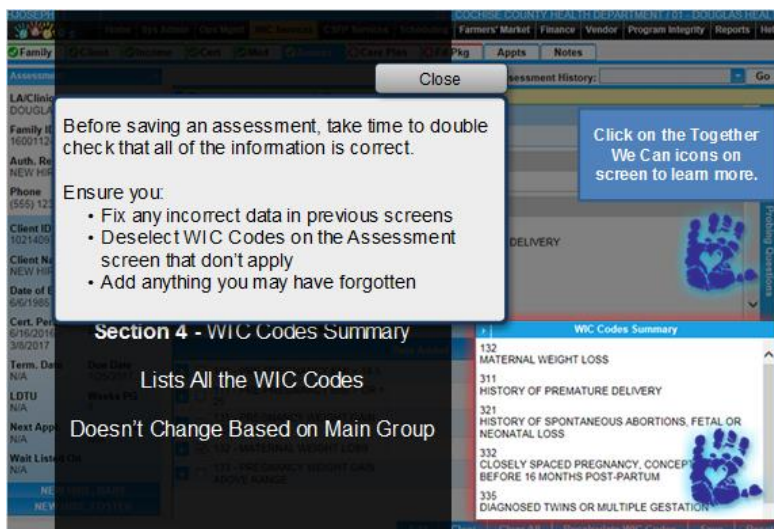
2.7 ASSESSMENT - WIC CODES SUMMARY



Notes:

Section four, located in the bottom-right of the screen, contains a summary of the WIC Codes assigned to the client. The WIC Codes Summary section lists the WIC Codes you've selected and the codes assigned by the system. Unlike the other sections, this area won't change if a different Main Group is selected.

01 (SLIDE LAYER)



02 (SLIDE LAYER)

Section 4 - WIC Codes Summary

Lists All the WIC Codes

Doesn't Change

Remember to look at the client, not the computer. During your conversation, take notes to keep track of information and WIC Codes you'd like to assign.

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

WIC Codes Summary

132	MATERNAL WEIGHT LOSS
311	HISTORY OF FETAL OR
335	DIAGNOSED TWINS OR MULTIPLE GESTATION

Close

2.8 SELF-CHECK - ASSESSMENT SECTIONS

Instructions: Match the purpose on the left to its section of the Assessment screen on the right, and then click 'SUBMIT' to check your answers.

This contains Assessment Topics based on the ABCDE Assessment Guide. These groups may also have Standard Questions.

Lists the WIC Codes you've selected and the codes assigned by the system.

Is hidden and is there in case you need a little extra help digging deeper into Assessment Topics.

Displays WIC Codes associated with the Main Group you have selected. This is where you assign WIC Codes to the client record.

Anthropometric
1. Feelings about pregnancy weight changes

Biochemical
7. Anemia and Lead Screening

Clinical
1. Allergies
2. MEDICAL HISTORY: MEDICAL CONDITIONS, RECENT SURGERY, DELIVERY
3. Medications
4. Nausea/Vomiting
5. Oral/Dental Health
6. Position of uterus, Disposition

WIC Codes
11. 001 - LOW HEMOGLOBIN / LOW HEMATOCRIT
12. 211 - LEAD POISONING

Standard Questions
1. What has your doctor said about your iron and lead levels?
2. What have you heard about anemia and lead testing?

WIC Codes Summary
12. INTERNAL WEIGHT LOSS
13. DIAGNOSED TWINS OR MULTIPLE GESTATION

Notes:

Match the purpose on the left to its section of the Assessment screen on the right, and then click 'SUBMIT' to check your answers.

2.9 ASSESSMENT - UPDATE AN ASSESSMENT

Update an Assessment: Complete Assessment

Date With New Code:

New Code:

WIC Codes	Date Added	WIC Codes Summary
<input type="checkbox"/> 101 - PRE-PREGNANCY BMI < 18.5	4/27/16	4/27/16 - 2/18/2016
<input type="checkbox"/> 111 - PRE-PREGNANCY BMI > OR = 26		PREGNANT WOMAN INGESTING FOODS THAT COULD BE CONTAMINATED WITH PATHOGENIC MICROORGANISMS
<input type="checkbox"/> 131 - PREGNANCY WEIGHT GAIN BELOW RANGE		132 - 6/16/2016
<input checked="" type="checkbox"/> 132 - MATERNAL WEIGHT LOSS	6/16/2016	MATERNAL WEIGHT LOSS
<input type="checkbox"/> 133 - PREGNANCY WEIGHT GAIN ABOVE RANGE		311 - 6/16/2016
		HISTORY OF PREMATURE DELIVERY
		321 - 6/16/2016
		HISTORY OF SPONTANEOUS ABORTIONS, FETAL OR NEONATAL LOSS
		332 - 6/16/2016
		CLOSELY SPACED PREGNANCY, CONCEPTION WITHIN 18 MONTHS OF PREVIOUS DELIVERY

Notes:

During a client's certification, you'll update assessment records and add new assessments based on information the client provides. This process ensures a thorough evaluation that meets the client's needs.

What's the difference between updating and adding new assessment records? Updating an assessment is selecting additional WIC Codes on an existing assessment record. Adding a new assessment involves adding and completing a new record. Let's find out more.

Update an assessment when the client provides information related to his or her health or nutrition status that leads to the assignment of more WIC Codes.

Examples of when to update an assessment include:

- A pregnant woman learns that she has Gestational Diabetes,
- A child is recently diagnosed with Celiac Disease, or
- A family becomes homeless

Update an assessment by choosing the appropriate Main Group and selecting the checkbox next to the WIC Code. After you save the information and complete the assessment, the WIC Codes will be assigned a date. The WIC Codes that were added at certification will keep the original date, and new codes will be given the current date.

2.10 ASSESSMENT - ADD AN ASSESSMENT

WIC Code	Description	Date Added	Action
132	MATERNAL WEIGHT LOSS		
311	HISTORY OF PREMATURE DELIVERY		
321	HISTORY OF SPONTANEOUS ABORTIONS, FETAL OR NEONATAL LOSS		
332	CLOSELY SPACED PREGNANCY, CONCEPTION BEFORE 18 MONTHS POST-PARTUM		
335	DIAGNOSED TWINS OR MULTIPLE GESTATION		
427.4	INADEQUATE VITAMIN/MINERAL SUPPLEMENTATION RECOGNIZED AS ESSENTIAL		

Notes:

Assessment records are added during Certification, after a Breastfeeding Assessment has been conducted, after a Category Change, and during the Mid-Certification Assessment, also called a Mid-Cert.

A blank assessment will automatically display at Certification and if a client changes category. At other times, you can add an additional assessment by selecting the Add button.

What happens when you add an additional assessment record? Previously completed Standard Questions are cleared, and need to be entered again.

The WIC Codes Summary and WIC Codes sections still list all of the codes that have been assigned to the client during the certification period.

The old assessment record is moved to History. Let's look at the steps for adding a new assessment record. First, work with the client to conduct a thorough ABCDE Assessment.

If a blank assessment isn't already displayed, select the Add button. Then complete the required Standard Questions, ensuring that you add the most recent information.

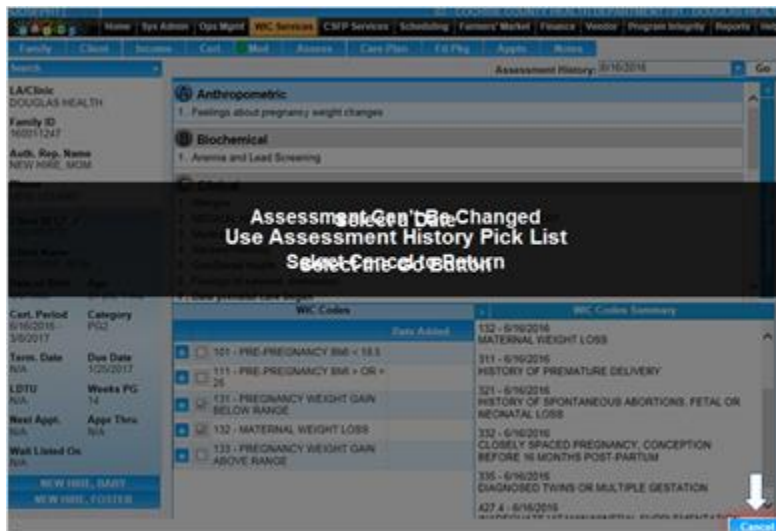
Select any WIC Codes that were discovered during the new ABCDE Assessment.

Double check the information and select the Save button.

After you are finished, complete the assessment process on the Care Plan screen. This permanently assigns the information to the client's record.

We will discuss completing the assessment process in the next module.

2.11 ASSESSMENT - HISTORY



Notes:

Can you view an assessment that has been moved to History? Yes, when a client has more than one assessment during a certification period, assessment records from the past can be viewed. Use the Assessment History pick list in the upper right-hand corner of the screen to view previous assessments.

Select the date of the assessment to view from the pick list, and press the Go button. The assessment you selected will display. This assessment is in read-only format, and can't be changed. To return to the main screen, select the Cancel button.

2.12 SELF-CHECK - ADD AN ASSESSMENT

Instructions: Select the best answer(s), and then click 'SUBMIT' to check your answer(s).

When should a new assessment be added? Select all that apply.

- ☒ At Certification and Mid-Cert
- ☒ When a client changes category
- ☒ When a Breastfeeding Assessment is conducted
- ☒ When required by policy and procedure
- ☐ When a client provides new nutrition or medical information

MC Codes

MC Code	Code Label	MC Code	Code Label
101 - PRE-PREGNANCY BMI < 18.5		110 - 6/10/2016	INTERNAL WEIGHT LOSS
111 - PRE-PREGNANCY BMI > 30		111 - 6/10/2016	HISTORY OF PREMATURE DELIVERY
120 - PREGNANCY WEIGHT GAIN BELOW AVERAGE		121 - 6/10/2016	HISTORY OF SPONTANEOUS ABORTIONS, FETAL OR NEONATAL LOSS
130 - PREGNANCY WEIGHT GAIN ABOVE AVERAGE		122 - 6/10/2016	CLOSELY SPACED PREGNANCY CONCEPTION BEFORE 18 MONTHS POST PARTUR
140 - 6/10/2016		123 - 6/10/2016	SMOKING STATUS OR MULTIPLE GESTATION
150 - 6/10/2016		124 - 6/10/2016	

ADD | CLEAR | CLOSE ALL | RECALCULATE MC CODES | SAVE | PRINT

2.13 BREASTFEEDING SURVEILLANCE

The screenshot shows the 'Breastfeeding Surveillance' screen in the HANDS system. The interface includes a top navigation bar with tabs like 'Home', 'My Alerts', 'My Reports', 'My Services', 'My Care Plan', 'My History', 'My Family', 'My Financial', and 'My Settings'. The main content area is divided into two sections. The left section contains client information: 'LAC/State: OREGON HEALTH', 'Family ID: 8001111', 'Auth. Rep. Name: NEW HIRE, MCM', 'Phone: (503) 274-4947', 'Client ID: 8001111', 'Client Name: NEW HIRE, CHILD A', 'Date of Birth: 8/19/2015', 'Age: 1 yr, 1 mo', 'Cm: PwC-C', 'Cm: PwC-C', 'Cm: PwC-C', 'Term Date: N/A', 'Due Date: N/A', 'LDTU: Weeks PG'. The right section contains the 'Most Recent Surveillance Date' and several questions: 'Is this infant/child currently breastfeeding?' (Yes/No), 'Has this infant/child ever been breastfed?' (Yes/No), 'How old was this infant/child when he/she completely stopped breastfeeding?' (Days, Weeks, Months), 'Why did you stop breastfeeding?' (New Pregnancy, Not Applicable, Nothing Given), and 'How old was this infant/child when he/she was first fed something other than breast milk?' (Days, Weeks, Months). At the bottom, there is a 'Select Save' button and a 'Save' button highlighted with a white arrow.

Notes:

Documenting breastfeeding information is required for each client who is less than 24 months of age. Breastfeeding data is used to calculate duration and initiation rates. It's also used for breastfeeding program funding, so it's very important to gather accurate information.

Breastfeeding information is recorded using several screens, including Assessment, Breastfeeding Surveillance and Notes. Let's explore the Breastfeeding Surveillance screen.

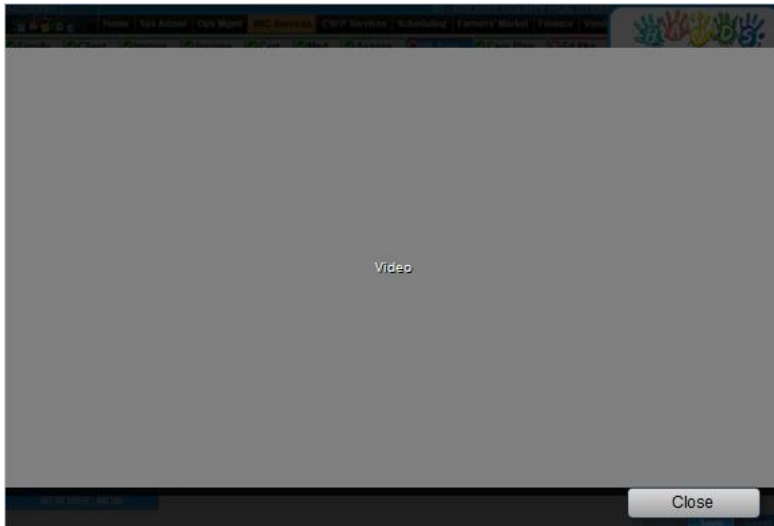
The Breastfeeding Surveillance screen collects information on breastfeeding initiation, duration, as well as the reason the client stopped breastfeeding, and exclusivity.

This screen is completed each time the client receives benefits, until age 2, or breastfeeding has stopped. How do you add breastfeeding information? At certification, a blank screen will display.

Work with the Authorized Rep. to collect breastfeeding initiation, duration, and exclusivity information. Then, complete the fields by entering data directly on the screen. If the client has stopped breastfeeding, select the reason why from the pick list. When finished, select the Save button.

To view an example of adding breastfeeding information using the Breastfeeding Surveillance screen in HANDS, click the Example button.

VIDEO EXAMPLE (SLIDE LAYER)



2.14 BREASTFEEDING SURVEILLANCE - SUBSEQUENT CERTIFICATIONS AND UPDATES

Family: LAC/Hea DOUGLAS HEALTH
Family ID: 18011247
Auth. Rep. Name: NEW HIRE, MCM
Phone: (561) 123-4567

Most Recent Surveillance Date: 8/18/2016

Is this infant/child currently breastfeeding?
☐ Yes ☐ No

Has this infant/child ever been breastfed?
☐ Yes ☐ No

How old was this infant/child when he/she completely stopped breastfeeding?

For Each Visit After Certification Then Save Do Not Add Button

Days: Weeks: Months:

Save

Notes:

For each visit after certification, select the Add button to add a new Breastfeeding Surveillance record.


Work with the Authorized Rep. as you did before to collect breastfeeding information. Document the information provided and select Save.

2.15 SELF-CHECK - BREASTFEEDING SURVEILLANCE

Instructions: Select the best answer, and then click "SUBMIT" to check your answer.

The Breastfeeding Surveillance screen applies to all clients under 24 months of age. When is the Breastfeeding Surveillance screen completed?

- ☐ At Certification and Mid-Cert
- ☐ Each time the client receives benefits, until he or she stops breastfeeding
- ☐ When the client stops breastfeeding
- ☐ When a client receives a breast pump or other breastfeeding information



2.16 SUMMARY



Notes:

You've completed Module 5 of the HANDS New Hire course.

In this module, you learned more about the assessment process.

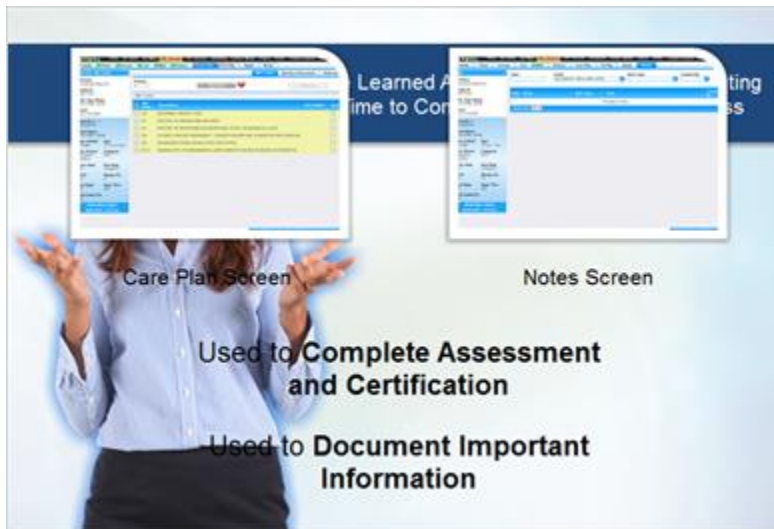
You learned about using the Assessment screen to record important health and nutrition information.

You also know how to add breastfeeding initiation and duration using the Breastfeeding Surveillance screen.

In the next module, you'll learn how to finish up the Assessment and Certification processes.

MODULE 6 - COMPLETING THE CERTIFICATION

3.1 COMPLETING THE CERTIFICATION



Notes:

The next topic is completing the certification process.

In this module, you'll learn about the Care Plan and Notes screens. These screens are used to complete both the assessment and the certification processes.

You'll also learn how to use these screens to document important information during a client's certification.

3.2 CARE PLAN

Select the highlighted tabs to display the different Care Plan Screens.

Referrals

Date	Program	Organization	Address	Status
06/16/2016	LOCAL AGENCY REFERRAL LIST			
06/16/2016	NUTRITIONIST RD			Referred
06/16/2016	AHCCCS			
06/16/2016	FOOD DISTRIBUTION PROGRAM OR FOOD STAMPS (SNAP)			Referred
06/16/2016	SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM			Participating
06/16/2016	TANF			Referred

Care Plan Screens

- WIC Codes information
- Nutrition Discussion contacts
- Referrals

Notes:

The Care Plan is an important part of the client's record. This screen, in combination with the Notes screen, gives a snapshot of the vital information contained within the client's record. It summarizes assessment, nutrition discussion, and referral information.

The Care Plan is comprised of three screens, WIC Codes, Nutrition Discussion, and Referrals. Let's start by learning about the WIC Codes screen. Now you try it.

WIC CODES (SLIDE LAYER)

Select the highlighted tabs to display the

WIC Codes | Nutrition Discussion | Referrals

Priority: ☐ High Risk ☒ Wait List

WIC Code	Description	Date Added	Active
<input checked="" type="checkbox"/> 132	MATERNAL WEIGHT LOSS		<input type="checkbox"/>
<input type="checkbox"/> 311	HISTORY OF PREMATURE DELIVERY		<input type="checkbox"/>
<input type="checkbox"/> 321	HISTORY OF SPONTANEOUS ABORTIONS, FETAL OR NEONATAL LOSS		<input type="checkbox"/>
<input type="checkbox"/> 332	CLOSELY SPACED PREGNANCY, CONCEPTION BEFORE 16 MONTHS POST-PARTUM		<input type="checkbox"/>
<input type="checkbox"/> 335	DIAGNOSED TWINS OR MULTIPLE GESTATION		<input type="checkbox"/>
<input type="checkbox"/> 427.4	INADEQUATE VITAMIN/MINERAL SUPPLEMENTATION RECOGNIZED AS ESSENTIAL		<input type="checkbox"/>

CP NUT DISCUSSION (SLIDE LAYER)

02 - DOUGLAS COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS HEALTH

Select the highlighted tabs to display the

Family Client

WIC Codes Nutrition Discussion Referrals

Care Plan Nutrition Discussion

LA/Clinic
DOUGLAS HEALTH

Family ID
160011247

Auth. Rep. Name
NEW HIRE, MOM

Phone
(555) 123-4567

Client ID
1021409727

Client Name
NEW HIRE, MOM

Date of Birth
6/6/1985

Age
31 yrs, 0 mos

Cert. Period
6/16/2016 - 3/8/2017

Category
PG2

Term. Date
N/A

Due Date
1/25/2017

LDTU
N/A

Weeks PG
8

Next Appt.
N/A

Appr Thru
N/A

Wait Listed On
N/A

NEW HIRE, BABY
NEW HIRE, FOSTER

Nutrition Discussion

Date Topic Type

No data to show

Save Print Case Plan Complete Assessment

CP REFERRALS (SLIDE LAYER)

02 - DOUGLAS COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS HEALTH

Select the highlighted tabs to display the

Family Client

WIC Codes Nutrition Discussion Referrals

Care Plan Referrals

LA/Clinic
DOUGLAS HEALTH

Family ID
160011247

Auth. Rep. Name
NEW HIRE, MOM

Phone
(555) 123-4567

Client ID
1021409727

Client Name
NEW HIRE, MOM

Date of Birth
6/6/1985

Age
31 yrs, 0 mos

Cert. Period
6/16/2016 - 3/8/2017

Category
PG2

Term. Date
N/A

Due Date
1/25/2017

LDTU
N/A

Weeks PG
8

Next Appt.
N/A

Appr Thru
N/A

Wait Listed On
N/A

NEW HIRE, BABY
NEW HIRE, FOSTER

Referrals

Date Program Organization Address Status

<input checked="" type="checkbox"/>	06/16/2016	LOCAL AGENCY REFERRAL LIST			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	06/16/2016	NUTRITIONIST/RO		Referred	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	06/16/2016	AHCCCS			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	06/16/2016	FOOD DISTRIBUTION PROGRAM ON INDIAN RESERVATIONS (FDPIR)		Referred	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	06/16/2016	FOOD STAMPS (SNAP) SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM		Participating	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	06/16/2016	TANF		Referred	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	06/16/2016	SECTION 8		Referred	<input checked="" type="checkbox"/>

Save Print Case Plan Complete Assessment

3.3 CARE PLAN - WIC CODES

WIC Codes Screen
Designates whether WIC Code is Actively Followed
Note: De-select Assigned Supplemental
When WIC Code is No Longer a Concern
High Risk Heart
De-select Checkbox next to WIC Code
Active Checkbox
Document & Save

WIC Code	Description	Date Added	Active	High Risk Heart
411.11	ROUTINELY NOT PROVIDING DIETARY SUPPLEMENTS RECOGNIZED AS ESSENTIAL BY NATIONAL PUBLIC HEALTH POLICY WHEN AN INFANT'S DIET ALONE CANNOT MEET NUTRIENT REQUIREMENTS	6/16/2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>
411.2	ROUTINELY USING NURSING BOTTLES OR CUPS INPROPERLY	6/16/2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>
411.4	ROUTINELY USING FEEDING PRACTICES THAT DISREGARD THE DEVELOPMENTAL NEEDS OR STAGE OF THE INFANT	6/16/2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>
411.5	ROUTINELY FEEDING INFANT FORMULAS & SUPPLEMENTS	6/16/2016	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Notes:

The WIC Codes screen lists all of the codes that have been assigned to the client during their certification. It also has the High Risk Heart and the Active checkboxes.

The Active checkboxes next to the WIC Codes are used to designate whether a client's WIC Code is being actively followed and discussed. To let other staff members know that this WIC Code is no longer a concern, de-select the Active checkbox next to the WIC Code and select Save.

For example, a client, who was assigned WIC Code 411.11 - Not Providing Dietary Supplements Recognized as Essential at certification, comes in again and he or she is now receiving essential supplements.

De-select WIC Code 411.11 to let other staff members know that this risk is not currently being discussed with the client. Remember to save your work and document this information in your note as well. We will discuss the Notes screen a bit later.

3.4 CARE PLAN - HIGH RISK HEART

The screenshot displays the LAClinic software interface for a client's care plan. The client's information is on the left, including Family ID 180011247, Auth. Rep. Name NEW HIRE, MOM, and Phone (555) 123-4567. The client ID 1021409720 is highlighted with a red box. The client name is NEW HIRE, BABY, with a date of birth of 5/16/2016 and age of 6 yrs, 11 mos. The cert. period is 5/16/2016 - 12/16/2016, and the category is 076.

The main section shows a list of WIC Codes with a table of codes and descriptions. A red heart icon is visible in the top right corner of the WIC Codes section, indicating a high-risk status. The table lists the following codes and descriptions:

WIC Code	Description	Date Added	Action
142	PREMATURE INFANT	5/16/2016	<input checked="" type="checkbox"/>
411.11	ROUTINELY NOT PROVIDING DIETARY SUPPLEMENTS RECOGNIZED AS ESSENTIAL BY NATIONAL PUBLIC HEALTH POLICY WHEN AN INFANT'S DIET ALONE CANNOT MEET NUTRIENT REQUIREMENTS	5/16/2016	<input type="checkbox"/>
411.2	ROUTINELY USING NURSING BOTTLES OR CUPS IMPROPERLY	5/16/2016	<input checked="" type="checkbox"/>
411.4	ROUTINELY USING FEEDING PRACTICES THAT DISREGARD THE DEVELOPMENTAL NEEDS OR STAGE OF THE INFANT	5/16/2016	<input checked="" type="checkbox"/>
411.6	ROUTINELY FEEDING INAPPROPRIATELY DILUTED FORMULA	5/16/2016	<input checked="" type="checkbox"/>
702	INFANT BEING BREASTFED BY A WOMAN AT NUTRITIONAL RISK	5/16/2016	<input checked="" type="checkbox"/>

At the bottom, there is a legend for the High Risk Heart icon:

- Red = Client Needs to Be Seen
- Green = Client No Longer Requires

Notes:

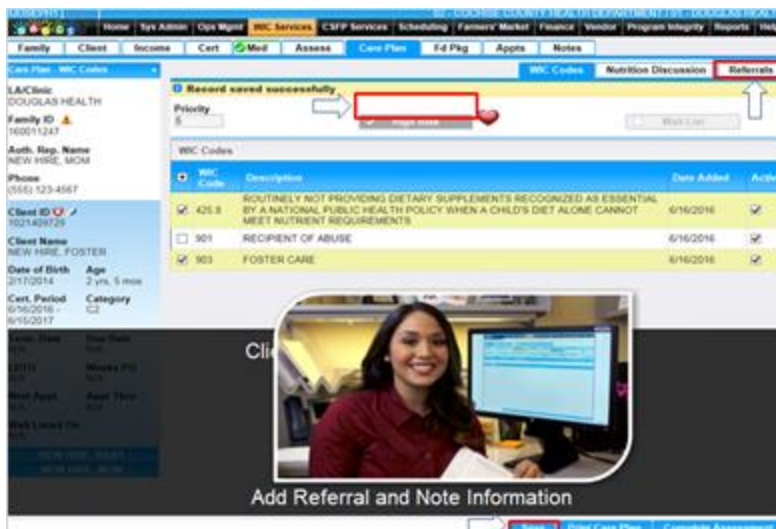
The High Risk Heart displays when a client has a WIC Code that is either High or Medium Risk. If the heart is red, the client needs to be seen by either a State-approved Nutritionist or Registered Dietitian (RD).

When the participant no longer requires in-depth nutrition counseling, the State-approved Nutritionist or RD will change the heart from red to green.

It's important to read the notes to get a complete picture of the client's needs, including when they might need to be referred back for a High Risk visit. If the same High Risk code is assigned during a subsequent certification, the red High Risk Heart will display again.

The High Risk icon in Active Record will always match the High Risk Heart in the Care Plan. The Active Record icon will be red if the High Risk Heart is red and will be green if the High Risk Heart is green.

3.5 ASSIGNING A HIGH RISK WIC CODE

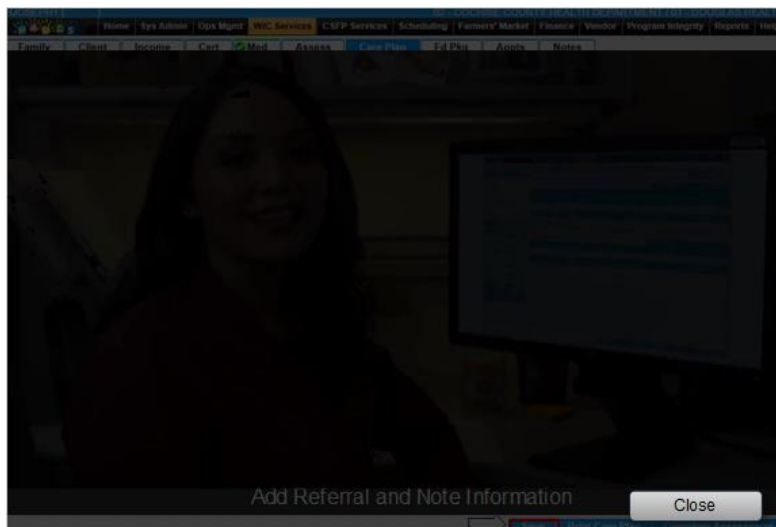


Notes:

There are times when a client needs to see a State-approved Nutritionist or RD, even if the system has not marked them as High Risk. When this happens, select the High Risk checkbox on the WIC Codes screen, then select the Save button. Add the referral on the Referrals screen, and make sure to record the reason for the referral in your Note. The steps to add referrals will be covered later in the module.

Watch the video to see how a staff member works with a client to assist her with receiving the services she needs.

VIDEO EXAMPLE (SLIDE LAYER)

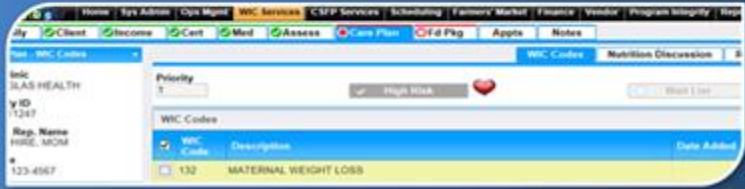


3.6 SELF CHECK - HIGH RISK HEART

Instructions: Select the best answer, and then click 'SUBMIT' to check your answer.

Which staff members changes the color of the High Risk Heart?

- ☐ Everyone
- ☐ The State-approved Nutritionist or Dietician
- ☐ State staff members
- ☐ The Help Desk



The screenshot shows the WIC Services software interface. The top navigation bar includes links for Home, Sys Admin, Cops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers Market, Finance, Vendor, Program Integrity, and Reports. The main menu on the left includes Client, Income, Cert, Med, Assess, Care Plan, Child Flag, Apples, and Notes. The central pane displays a client record for 'JLAS HEALTH' with ID 1247. The 'Priority' is set to 'High Risk' with a red heart icon. The 'WIC Codes' section shows a table with one entry: '132 MATERNAL WEIGHT LOSS'. The 'Nutrition Discussion' tab is active, showing a 'Start Date' field.

WIC Code	Description	Date Added
132	MATERNAL WEIGHT LOSS	

3.7 CARE PLAN - NUTRITION DISCUSSION

The screenshot displays the 'CARE PLAN - NUTRITION DISCUSSION' screen in a software application. The top navigation bar includes tabs for Family, Client, Income, Cert, Med, Assess, Care Plan, Fd Pkg, Appts, and Notes. The left sidebar shows client information: LA/State: DOUGLAS HEALTH, Family ID: 16051247, Auth. Rep. Name: NEW HIRE, MOM, Phone: (565) 123-4567, Client ID: 1021409727, Client Name: NEW HIRE, MOM, Date of Birth: 6/6/1985, Age: 31 yrs, 1 mo, Cert. Period: 6/15/2016 - 3/8/2017, Category: P02, Term. Date: N/A, Due Date: 1/25/2017, EDIU: N/A, Weeks PG: 14, Next Appt.: N/A, Appt Thru: N/A. The main area shows a table for documenting nutrition education contacts. A red box highlights the 'Add' button at the bottom right of the screen. Below the table, there is a text box with the instruction: 'Document Nutrition Discussion in Care Plan. Use Notes to Document Detailed Information. Select Add button.' The bottom of the screen has a navigation bar with 'Add', 'Search', and 'Reset' buttons.

Notes:

Let's move on to the Nutrition Discussion area of the Care Plan. During a one-year WIC certification, a participant will need to have at least four nutrition education contacts, or Nutrition Discussions, documented in their file: one at the time of certification, a follow-up contact, a mid-certification contact, and a final follow-up contact.

The follow-up contacts depend on client needs and may include High or Medium Risk visits, one-on-one Nutrition Discussions, or Group Discussions.

Use the Nutrition Discussion portion of the Care Plan to document which kind of nutrition contact, or discussion, you've completed.

Select the Add button to display the Add pop-up window. Select the type of contact from the Topic list, and then verify the information in the Type pick list is accurate.

Select OK to close the window and add the information to the Nutrition Discussion screen. Then save your work, by selecting the Save button.

Use the Notes screen to document detailed information about the topics you discussed with your client. More information about the Notes screen is covered later in this module.

3.8 CARE PLAN - REFERRALS

Client Profile:

- Family ID: 160011247
- Auth. Rep. Name: NEW HIRE, MOM
- Phone: (561) 123-4567
- Client ID: 1021409727
- Client Name: NEW HIRE, MOM
- Date of Birth: 6/6/1985
- Age: 31 yrs, 9 mos
- Care Period: 6/16/2016 - 3/8/2017
- Category: PG2

Referrals Table:

Date	Program	Organization	Address	Status
06/16/2016	LOCAL AGENCY REFERRAL LIST			Referred
06/16/2016	NUTRITIONIST RD			Referred
06/16/2016	ANCCCS			Referred
06/16/2016	FOOD DISTRIBUTION PROGRAM ON			Referred
06/16/2016	RESERVATIONS (FOPIR)			Referred
06/16/2016	FOOD STAMPS (SNAP) SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM			Participating

Watermark Text:

Add Referral from Child Support Eligibility Screen
Save Your Work
Income Referral will automatically display on Care Plan
Record whether Client is Participating
Doesn't Work in Reverse
Not Eligible/Not Interested

Notes:

The last section of the Care Plan is the Referrals screen. This screen is used to record the referrals you've made, and whether the client is currently participating in the program, or whether they're not eligible or not interested in the program.

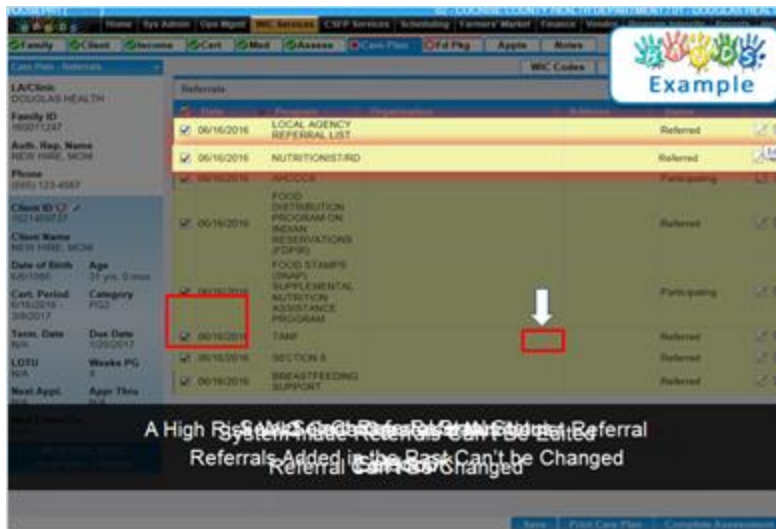
To make this process faster add referral information on the Income Eligibility screen. Referrals documented on the Income screen will automatically display on the Referrals screen. However, this doesn't work in reverse; making changes to the Referrals screen won't update the Adjunctive Eligibility Grid.

To add a new referral, select the Add new record button to open the Add pop-up.

Select the Referral Program from the Program pick list, Referral Organization from the Organization pick list and Referral Status from the Status pick list. The Referral Organization field is optional. Check with your Agency's policies and procedures to see if you need to use this field.

Select OK to close the window and add the information to the Referrals screen. Then save your work, by selecting the Save button.

3.9 CARE PLAN - EDIT REFERRALS



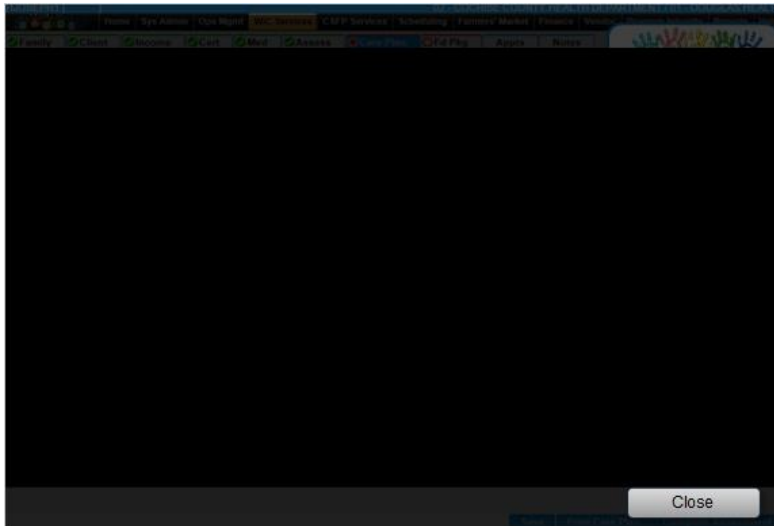
Notes:

What do you do when the system assigns a referral, but doesn't select a status? To select or change the Status of an existing Referral, select the Edit icon to open the Edit pop-up. Select the desired Referral Status from the Status pick list, and then select OK to close the window and update the information on the Referrals screen. Make sure to save the changes.

Some referrals are made by the system and can't be edited. In addition, referrals added in the past can't be changed. For example, a High Risk WIC Code automatically creates a Nutritionist referral. This referral can't be changed on the Referrals screen.

To view an example of editing a referral in HANDS, click the Example button.

VIDEO EXAMPLE (SLIDE LAYER)



3.10 CARE PLAN - COMPLETE ASSESSMENT

Assessment completed successfully.

Priority: 5 High Risk

WIC Codes

WIC Code	Description	Date Added	Action
✓ 132	MATERNAL WEIGHT LOSS	6/16/2016	✓
✓ 311	HISTORY OF PREMATURE DELIVERY	6/16/2016	✓
✓ 321	HISTORY OF SPONTANEOUS ABORTIONS, FETAL OR NEONATAL LOSS	6/16/2016	✓
✓ 332	CLOSELY SPACED PREGNANCY, CONCEPTION BEFORE 18 MONTHS POST-PARTUM	6/16/2016	✓
✓ 338	DIAGNOSED TWINS OR MULTIPLE GESTATION	6/16/2016	✓
✓ 427.4	INADEQUATE VITAMIN/MINERAL SUPPLEMENTATION RECOGNIZED AS ESSENTIAL	6/16/2016	✓

Finalizes the Assessment and Certification Process
Once everything is correct, select the Complete Assessment button.
Allows you to Issue Benefits

Web Linked On: N/A

NEW HIRE, BABY
 NEW HIRE, FOSTER

Save Print Case Plan **Complete Assessment**

Notes:

You've used PCS skills to connect with the client, collect his or her health and nutrition concerns, and document the assessment information. Now it's time to finalize the assessment and permanently add all of the information to the client's record.

Make sure you review everything you have completed before moving to the next step. Double check your documentation, fix any incorrect data, and add anything you may have forgotten.

Once everything is correct, select the Complete Assessment button. This finalizes the assessment and certification processes and allows you to issue benefits to your client. When the Assessment process has been completed, each of the client's WIC Codes will have a Date Added. This field shows the date the WIC Code was assigned to the client.

3.11 CARE PLAN - SUBSEQUENT CERTIFICATIONS AND UPDATES

The screenshot displays the 'WIC Services' software interface. On the left, a sidebar shows client information for 'LA/Clinic DOUGLAS HEALTH', including Family ID 160011247, Auth. Rep. Name NEW HIRE, SMO, Phone (555) 123-4567, Client ID 1021409727, Client Name NEW HIRE, SMO, Date of Birth 6/6/1985, Age 31 yrs, 1 mo, and Cert. Period 6/16/2016 - 6/30/2017. The main window shows a 'WIC Codes' table with the following data:

WIC Code	Description	Date Added	Action
427.5	PREGNANT WOMEN REQUESTING FOODS THAT COULD BE CONTAMINATED WITH PATHOGENIC MICROORGANISMS	7/18/2016	<input checked="" type="checkbox"/>
132	MATERNAL WEIGHT LOSS	6/16/2016	<input checked="" type="checkbox"/>
311	HISTORY OF PREMATURE DELIVERY	6/16/2016	<input checked="" type="checkbox"/>
321	HISTORY OF SPONTANEOUS ABORTIONS, FETAL OR NEONATAL LOSS	6/16/2016	<input checked="" type="checkbox"/>
332	CLOSELY SPACED PREGNANCY, CONCEPTION BEFORE 18 MONTHS POST-PARTUM	6/16/2016	<input checked="" type="checkbox"/>
336	DIAGNOSED TWINS OR MULTIPLE GESTATION	6/16/2016	<input checked="" type="checkbox"/>

Below the table, a large black banner contains the following text: 'Enter New Care Plan Information the Same Way. Completing the Assessment Is Important Especially for Mid-Cert. Save as You Normally Would. System Won't Allow You to Issue Benefits Until Process Is Completed. Ensures WIC Codes Are Properly Assigned. Ensures Accurate Assessment History.' At the bottom right, there is a 'Complete Assessment' button.

Notes:

During subsequent certifications and updates enter new Care Plan information the same way you added the original information, then save as you normally would.

If you update or add a new assessment to the client's record, make sure you select the Complete Assessment button. This ensures the WIC Codes are properly assigned to the client's record and an accurate assessment history is documented.

Completing the assessment process is especially important if you are conducting a Mid-Certification Assessment. The system won't allow benefits to be issued to the client until the process is completed by selecting the Complete Assessment button.

3.12 SELF CHECK-COMPLETE ASSESSMENT

Instructions: Choose all the best answer(s), and then click 'SUBMIT' to check your answer(s).

When should the Complete Assessment button be used?
(Select all that apply.)

- ☐ After adding new WIC Codes to an existing Assessment
- ☐ After adding a new Assessment
- ☐ When finalizing a Certification or Mid-Cert Assessment
- ☐ At every visit
- ☐ When the client receives nutrition education

MR. BARRY
MR. FOSTER

[Save](#) [Print Care Plan](#) [Complete Assessment](#)

3.13 INTRODUCTION TO NOTES



Notes:

A note is required at all visits where an assessment is completed and/or one-on-one education is offered. Your note is important because it documents important aspects of the certification, the services provided, and information for the next visit.

There may be other times when it's necessary to add notes. These may include documenting an Authorized Representative change, Program Education, or contact attempts for missed appointments.

Review your Agency's policies and procedures for more information on notes.

3.14 NOTES

Date	Client	Note Type	Note	Created By
01/09/2016	1021409729 NEW HIRE, FOSTER	STAFF ALERT	Notes that need to draw the attention of the next reader should be marked as a Staff Alert. These types of notes are applied to all of the clients in the family.	HJOSEPH1
01/09/2016	1021409729 NEW HIRE, FOSTER	PROGRAM EDUCATION	Rights and Obligations	HJOSEPH1
01/09/2016	1021409729 NEW HIRE, FOSTER	PROGRAM EDUCATION	Rules and Regulations	HJOSEPH1

Notes Screen Lists All Client Notes
Note Information is Included In Grid:
 Listed With Most Recent First
 Active Staff Alerts Appear at the Top, Regardless of Date

Notes:

The Notes screen lists all of the notes that have been created for a client. The information about each existing note is included in a grid on the screen. This information includes the date the note was created, who created it, the client the note was created for, the Note Type, and the note itself.

Notes are listed starting with the most recent. There are special notes, called Staff Alerts, which appear at the top of the screen, no matter when they are created. We will learn more about Staff alerts in a few minutes.

3.15 NOTES - VIEW CLIENTS

Date	Client	Note Type	Note	Created By
01/09/2016	1021409728 NEW HIRE BABY	STAFF ALERT	Notes that need to draw the attention of the next reader should be marked as a Staff Alert. These types of notes are applied to all of the clients in the family.	JOSEPH1
01/09/2016	1021409728 NEW HIRE BABY	PROGRAM EDUCATION	Rights and Obligations	JOSEPH1
01/09/2016	1021409728 NEW HIRE BABY	PROGRAM EDUCATION	Rules and Regulations	JOSEPH1

Notes for All Clients in a Family Can Be Accessed

Select Client from Pick List

Select Search

Can Also View by Note Type or Staff Member

Example

Notes:

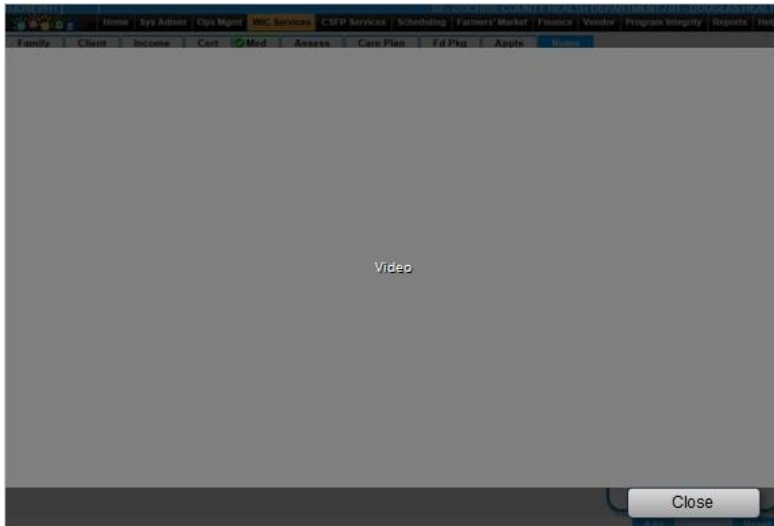
The notes for all of the clients in a family can be accessed using the same screen. To access another family member's notes, first select the client from the Client pick list.

Then select the Search button. The selected client's notes will display.

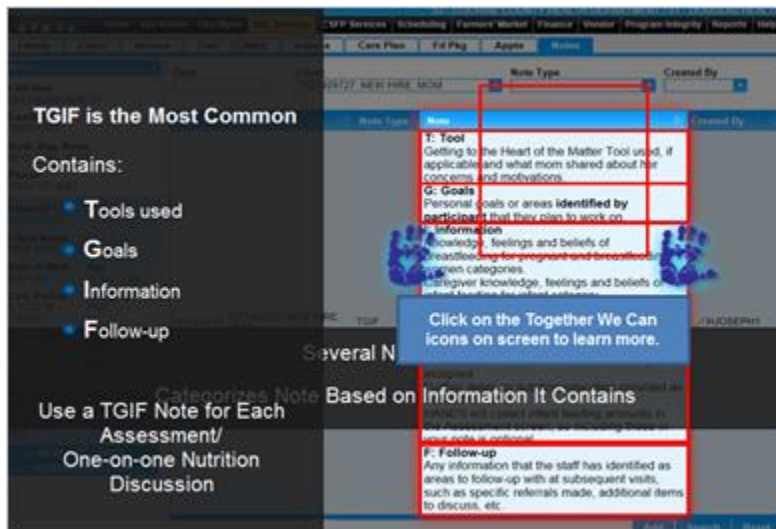
Notes can also be viewed by Note Type, using the Note Type pick list, or the staff member who created the note, using the Created By pick list.

To view an example of how accessing client notes looks using HANDS, click the Example button.

VIDEO EXAMPLE (SLIDE LAYER)



3.16 NOTES - NOTE TYPES

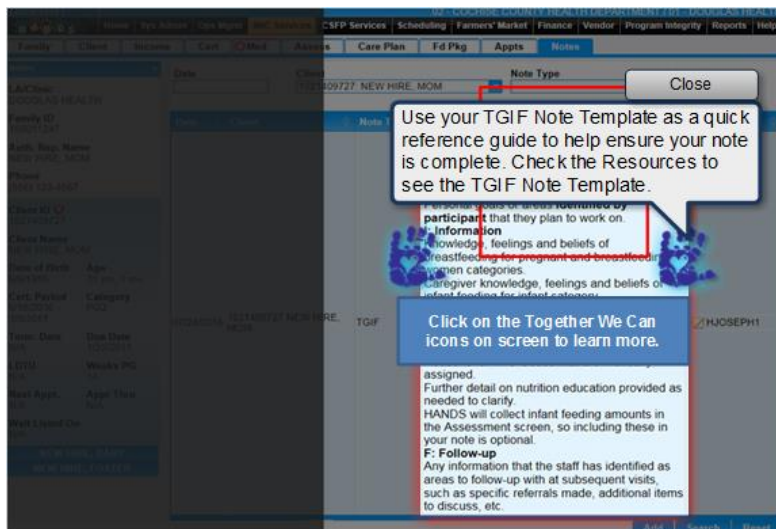


Notes:

There are several Note Types in HANDS, and they may change from time to time. Selecting a Note Type categorizes the note based on the kind of information it contains.

TGIF notes are the most common type used and contain information about tools used, goals the client set, information gathered, and how you want to follow-up with the client. Remember to add a TGIF note each time an assessment is completed and/or one-on-one education is offered.

TOGETHER WE CAN 1 (SLIDE LAYER)



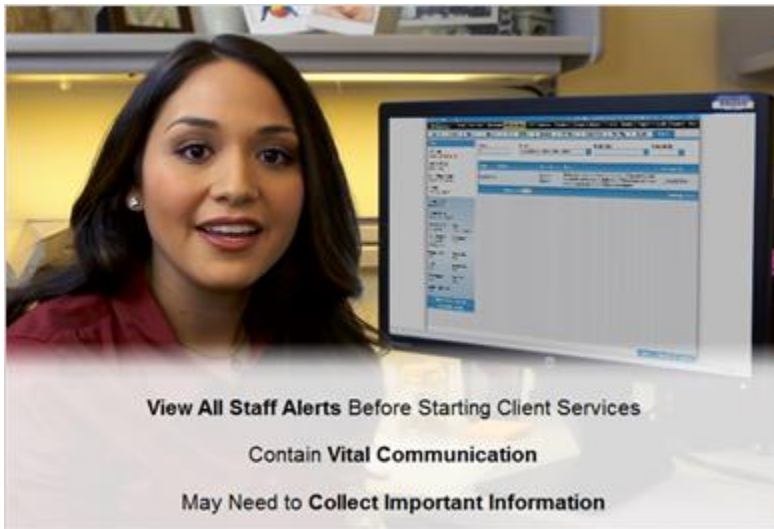
TOGETHER WE CAN 2 (SLIDE LAYER)

The screenshot shows the HANDS software interface with several instructional callouts:

- Close**: A button at the top center of the slide layer.
- Remember to look at the client, not the computer. During your conversation, use your ABCDE Guide to keep track of information and possible codes you'd like to assign.**: A callout box on the left side of the screen.
- Note Type**: A dropdown menu at the top of the notes section.
- Created By**: A dropdown menu on the right side of the notes section.
- Click on the Together We Can icons on screen to learn more.**: A callout box pointing to the 'Together We Can' icons.
- Information**: A callout box pointing to the 'Information' section of the notes.
- Follow-up**: A callout box pointing to the 'Follow-up' section of the notes.

The background interface shows a client profile for 'JACQUELINE MORGAN' with various tabs like 'Family', 'Client', 'Assessments', 'Care Plans', 'Appointments', 'Notes', 'Program Integrity', and 'Reports'. The 'Notes' tab is currently selected, showing a list of notes with columns for 'Note Type' and 'Created By'.

3.17 NORES - STAFF ALERT



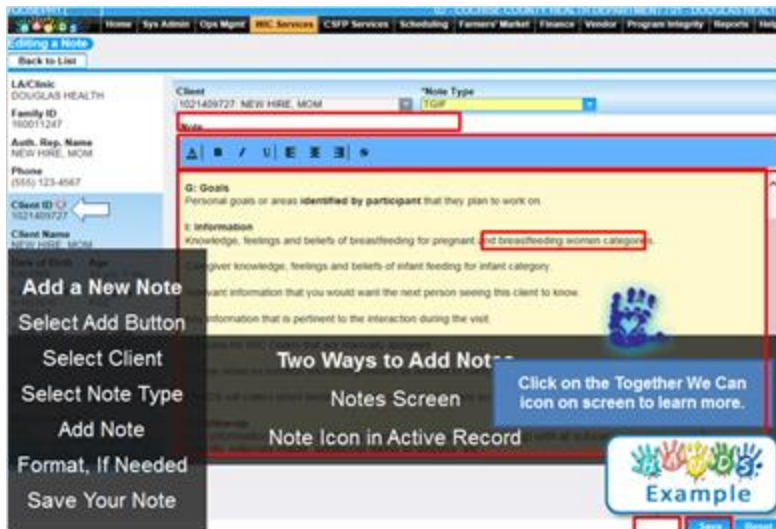
Notes:

One of the Note Types is a Staff Alert. Notes that need to draw the attention of the next staff member should be marked as a Staff Alert. These types of notes are applied to all of the clients in the family, so you don't have to select a client from the pick list when you add a Staff Alert.

When a Staff Alert is created, an icon will appear in the Active Record next to the Family ID. Hovering over the icon will display a message that informs you that the client has a Staff Alert and that you should view the notes. If you click on the icon, you'll be taken to the Notes screen.

View all Staff Alerts before starting each client visit. They contain vital communication and may direct you to collect important information from the client.

3.18 NOTES - ADD A NOTE



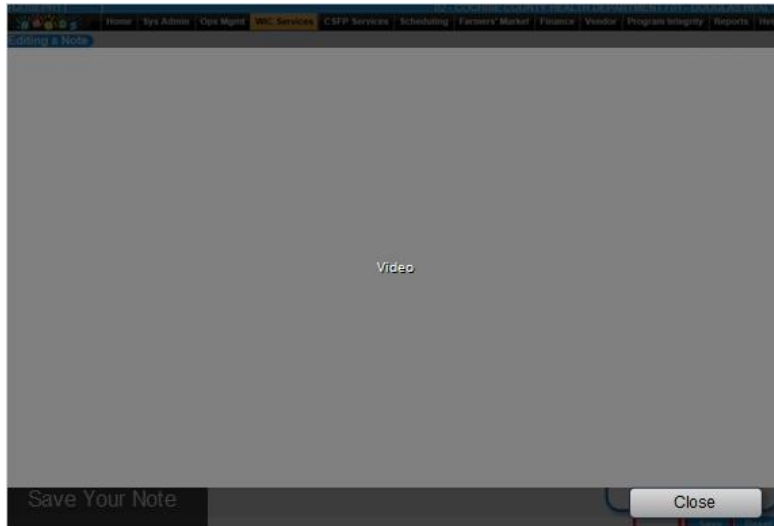
Notes:

There are two ways to add a note to a client record: using the Notes screen or selecting the Note icon in Active Record. The Note icon is available in most screens in the Certification Flow Menu, with the exception of the Family Information and Notes screens.

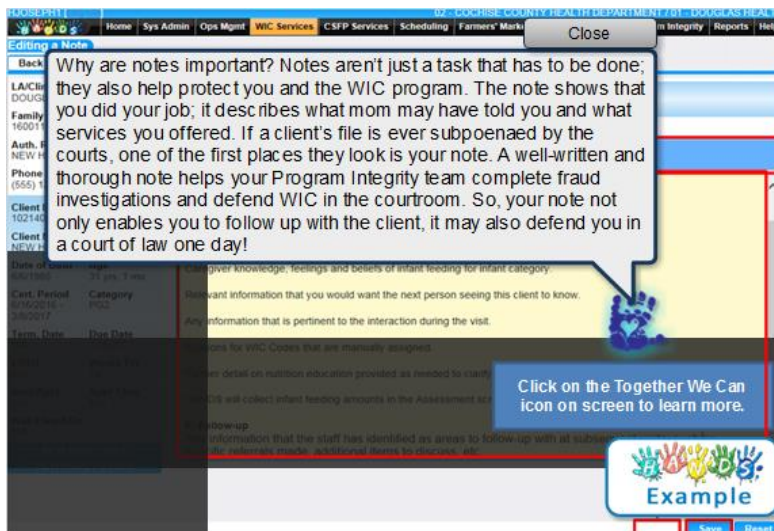
To add a new note using the Notes screen, select the Add button to open the Add screen. Select the client and the Note Type from the pick lists, and then add your note. Use the format menu to change the font style, or alignment of your note. Finish by selecting Save.

To view an example of adding a note in HANDS, click the Example button.

VIDEO EXAMPLE (SLIDE LAYER)



TOGETHER WE CAN (SLIDE LAYER)



3.19 NOTES - ACTIVE RECORD

The screenshot displays the 'Notes' screen within the 'Active Record' section. The top navigation bar includes tabs for 'Family', 'Client', 'Income', 'Cost', 'Med', 'Assess', 'Care Plan', 'F-d Pkg', 'Appts', and 'Notes'. The 'Notes' tab is selected. On the left, a sidebar shows client information for 'NEW HIRE, FOSTER'. The main area features a table with columns for 'Date', 'Client', 'Note Type', 'Note', and 'Created By'. A red box highlights the 'Notes' icon in the top navigation bar. Another red box highlights the 'Add' button at the bottom right of the screen. A third red box highlights the 'Format' button in the bottom right corner of the 'Add Note' pop-up window. The 'Add Note' pop-up window is open, showing fields for 'Note Type', 'Note', and 'Format'. The 'Note Type' field is set to 'T: Tool'. The 'Note' field contains text about the 'Tool' and 'Goals'. The 'Format' field is set to 'T: Tool'.

Notes:

To add a new note using the Notes icon in Active Record, make sure you are in the client's record.

Select the Note icon to open the Add pop-up window. Select the Note Type from the pick list, and then add your note. Use the format menu to change the font style, or alignment of your note. Save your note and then select the Close button to go back to the main screen.

To see the note you created, navigate to the Notes screen.

3.20 NOTES - EDIT A NOTE

Notes

Family ID: 160011247
Auth. Rep. Name: NEW HIRE, MOM
Phone: (562) 123-4567
Client ID: 1021409726
Client Name: NEW HIRE, BABY
Date of Birth: 6/16/2016
Age: 6 yrs, 11 mos
Cert. Period: 6/16/2016 - 12/16/2016
Term Date: N/A
Due Date: N/A

Date	Client	Note Type	Note	Created By
6/16/2016	NEW HIRE, BABY	STAFF ALERT	Notes that need to draw the attention of the next reader should be marked as a Staff Alert. These types of notes are applied to all of the clients in the family.	JHUOSEPH

Notes can only be edited on the same day they were created. Select the Staff Alert icon in Active Record will disappear.

Buttons: Add, Search, Reset

Notes:

With the exception of deactivating a Staff Alert, notes can only be edited on the same day, by the staff member who created them. How do you edit a note you've created? First, select the Edit icon to open the edit window. Change the text, format, or Note Type. For this example, we will change the alignment of the heading text.

When everything is correct, select the Save button. This will save changes and navigate you back to the main screen.

When a Staff Alert no longer applies, you can deactivate it using the edit process. Select the edit icon for the Staff Alert you wish to deactivate. De-select the Active Staff Alert checkbox, and select the Save button. This change is applied to all the clients in the family.


The note will move from the top of the screen and will be listed according to the date it was created. When all of the Staff Alerts are deactivated, the Active Record icon will disappear.

3.21 SELF CHECK - NOTES

Instructions: Choose all the correct answers, and then click 'SUBMIT' to check your answer(s).

Why do we add Notes to the Client's record?

- ☐ To share information for the next visit
- ☐ To document information about the client's visit
- ☐ To protect the WIC program and staff
- ☐ To add extra work




The screenshot shows the 'Notes' tab in the WIC Services application. The interface includes a top navigation bar with tabs like 'Home', 'Cert', 'Mod', 'Assess', 'Care Plan', 'Ed Plan', 'Appra', and 'Notes'. Below the navigation bar, there are fields for 'Date', 'Client' (1021405727 NEW HIRE MON), 'Note Type', and 'Created By'. A table below these fields has columns for 'Date', 'Note Type', 'Note', and 'Created By'. The table is currently empty, displaying 'No data to show:'. At the bottom of the table, there is a 'New record' button.

3.22 SELF CHECK - ADD A NOTE

Instructions: Choose all the correct answers, and then click 'SUBMIT' to check your answer(s).

Which two areas allow you to add a note to a client record?
Select the two answers that apply

- ☐ The Notes Icon in Active Record
- ☐ The Notes screen
- ☐ The Care Plan
- ☐ The Assessment screen



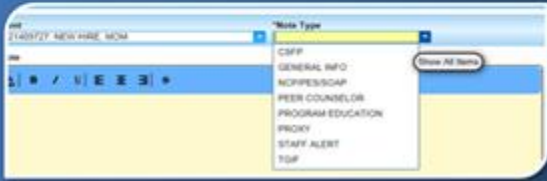
The screenshot shows the 'Notes' tab in the HANDS software. The navigation bar at the top includes tabs for Home, Cert, Med, Assess, Care Plan, Fd Pkg, Apppts, and Notes. The 'Notes' tab is selected. Below the navigation bar, there is a form with fields for Date, Client (1021409727, NEW HIRE, MOAM), Note Type, and Created By. Below the form, there is a table with columns Date, Client, Note Type, Note, and Created By. The table is currently empty, and a message 'No data to show' is displayed at the bottom of the table.

3.23 SELF CHECK - NOTE TYPES

Instructions: Select the best answer, and then click "SUBMIT" to check your answer(s).

Which Note Type would you use for important notes that need to grab the attention of the next reader?

- ☐ Program Education
- ☐ Staff Alert
- ☐ TGIF
- ☐ General Information



The screenshot shows a web application interface for 'HANDS NEW HIRE TRAINING'. It features a 'Note Type' dropdown menu with the following options: CSFP, GENERAL INFO, NONPES/SCAP, PEER COUNSELOR, PROGRAM EDUCATION, PROXY, STAFF ALERT, and TGIF. A 'Show All Items' button is also visible next to the dropdown.

3.24 SUMMARY



Notes:

Great Job! You've completed Module 6 of the HANDS New Hire course.

In this module, you learned how to finish the assessment and certification processes.

You learned about using the Care Plan screen to document and update WIC Codes, nutrition discussion and referral information.

You also learned about using the Notes screen and the Notes icon in Active Record to record important information about the client's visit.

In the next module, we'll learn about scheduling appointments.

MODULE 7 - APPOINTMENTS

4.1 APPOINTMENTS



Notes:

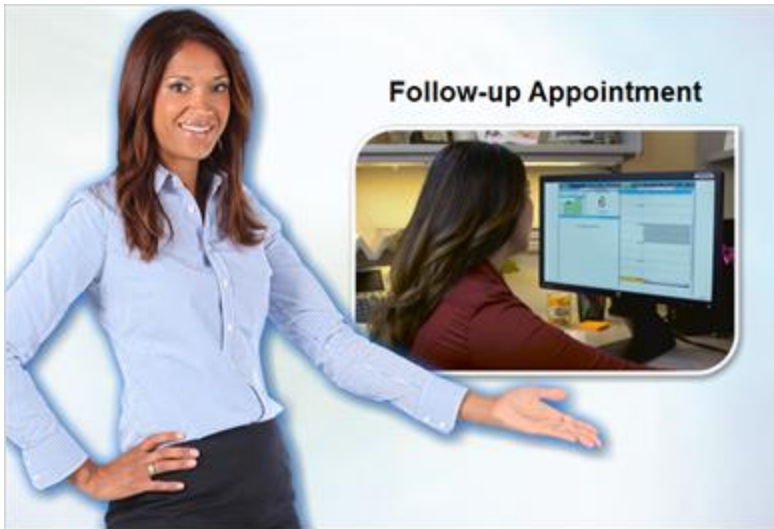
Now that you've learned about the certification and enrollment processes, it's time to learn about the screens you'll need to schedule appointments.

In this module, you'll learn about scheduling one-on-one and group appointments using HANDS.

You'll also learn about documenting services the client needs in the future, viewing upcoming appointments, and viewing appointment history.

In addition, we'll continue to learn about 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.

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



Notes:

Watch the video of our WIC staff member, Lorena, make a follow-up appointment with for her client, and then answer the questions on the next screen.

Lorena: So that's how to use your benefits - did you have any other questions?

Yvonne: *(Looks like she's about to ask a question but is cut off by Lorena.)*

Lorena: Our dietician is only in on Tuesdays and Thursday, so your next appointment will be the first Tuesday of next month at 3 p.m.

Yvonne: I can't come on a Tuesday.

Lorena: Oh. As I said, she's only here on Tuesdays and Thursday, so we can make it the first Thursday then at 3 p.m.

Yvonne: I guess I can make it.

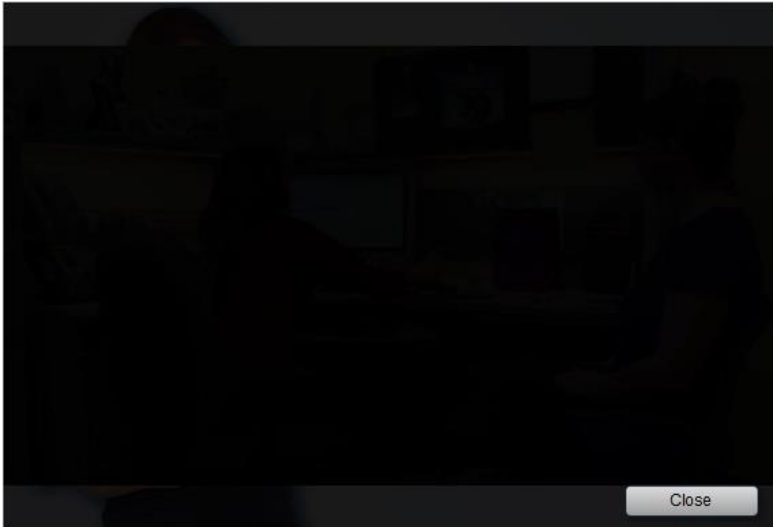
Lorena: Well we're all finished here. You can pick up your benefits at the front.

Yvonne: I'm sorry, where do I get the benefits?

Lorena: Um, they're at the front where you came in. Naomi has them. Just ask someone up front for help.

Yvonne: *(Looks a bit confused, but eventually exits.)*

VIDEO EXAMPLE (SLIDE LAYER)




4.3 VIDEO SCENARIO 1 - WHAT DO YOU THINK?

Instructions: Using information from the video on the previous screen, type in your answer, then click "View Example." If you haven't watched the video, please go to the previous screen to view it.

Based on the information in the video, how likely is this client to keep her appointment? How well has Lorena considered the client's needs? What would you do differently?

Type your text here.

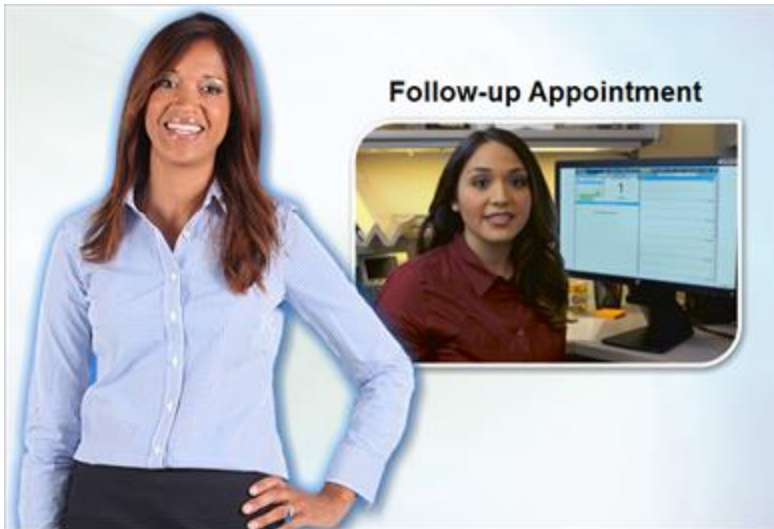
[View Example](#)

A small video window showing a woman with short dark hair, wearing a blue t-shirt, looking directly at the camera. She is in an indoor setting with shelves and papers visible in the background.

Notes:

Based on the information in the video, how likely is this client to keep her appointment? How well has Lorena considered the client's needs? What would you do differently?

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



Notes:

Watch another video of Lorena taking a different approach to the appointment process, and then answer the questions on the next screen.

Lorena: So, now that we've reviewed everything, what questions do you have about your benefits and how to use them in the store?

Yvonne: I don't think I have any questions right now. It sounds pretty easy.

Lorena: Great! So now it's time to get you set up for your next appointment. You said you wanted to also set up an appointment with our dietician for Anthony. She's available on Tuesdays and Thursdays, and if you'd like to get in sooner, she has some appointments available next month. What works best for you?

Yvonne: Sooner would be good, so next month I guess. Um, did you say Tuesdays? I can't come on Tuesdays.

Lorena: Oh, our dietician has appointments available on Thursdays too. Let me show you her schedule, and you let me know what day and time works best for you. *(Turns her computer appointment screen toward Yvonne to let her see availability.)*

Yvonne: *(Pointing at the screen.)* Oh, this day would be great. Can I come in the morning, at like around 10?

Lorena: She has a 10 a.m. available, so I'll just go ahead and put your name in. Did you have any other questions?

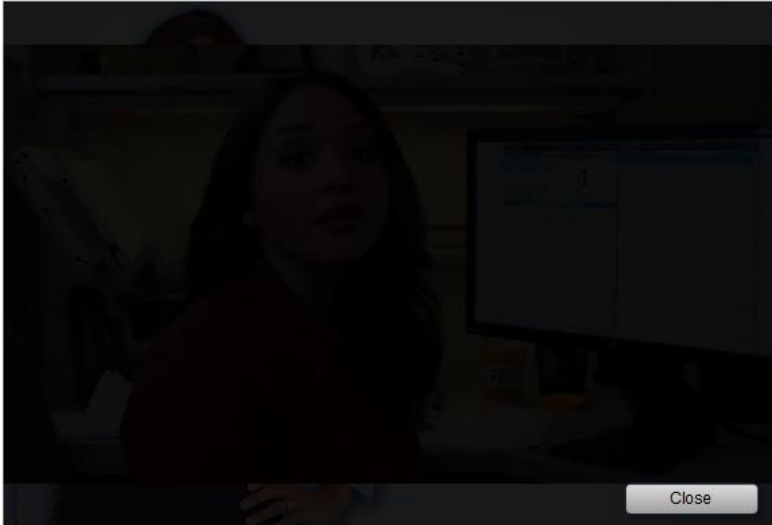
Yvonne: No, I can't think of anything. Thank you so much.

Lorena: Okay, I think you're all set for today. Your benefits will be up front, so Naomi will have them. If you'd like I can walk you out and show you where you can pick them up.

Yvonne: Oh, that would be great! Thank you so much for everything today!

Lorena: You're welcome.

VIDEO (SLIDE LAYER)




4.5 VIDEO SCENARIO 2 - WHAT DO YOU THINK?

Instructions: Using information from the video on the previous screen, type in your answer, then click "View Example." If you haven't watched the video, please go to the previous screen to view it.

Based on the information in the video what did Lorena do differently in this video? How would you prefer to be treated?

Type your text here.

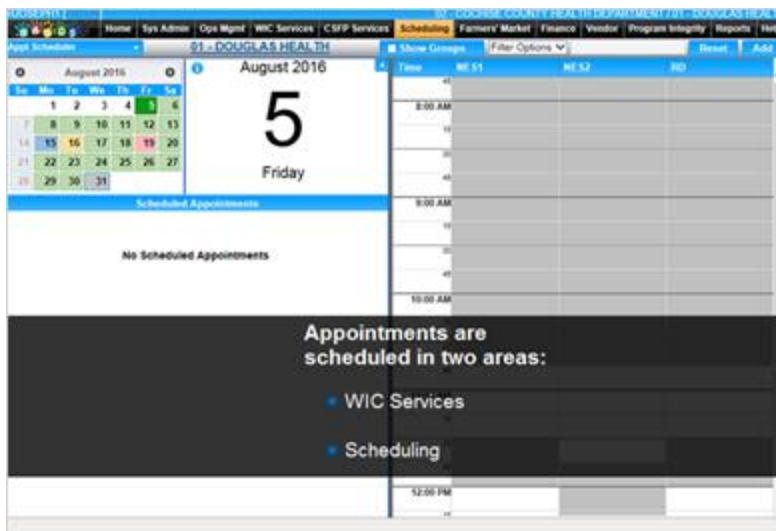
[View Example](#)



Notes:

Based on the information in the video, what did Lorena do differently in this video? How would you prefer to be treated?

4.6 INTRODUCTION TO APPOINTMENTS



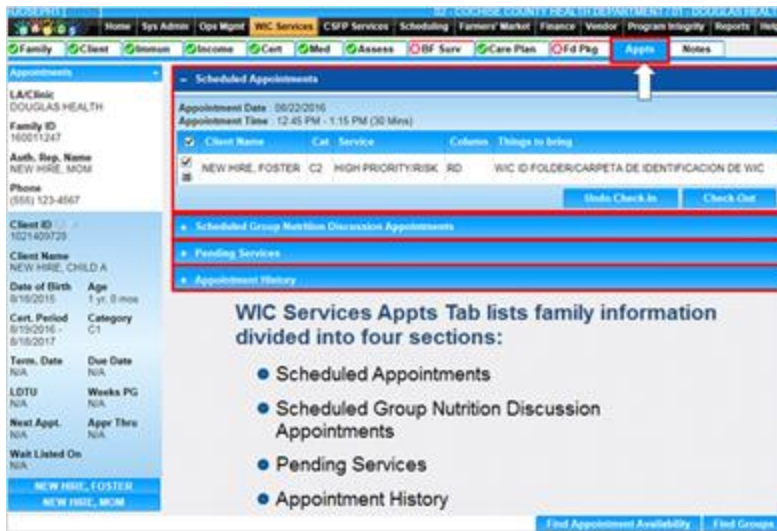
Notes:

HANDS has rich appointment functionality, which when coupled with your PCS skills, assists you with scheduling the services each client needs.

There are two types of appointments in HANDS. The first type is for an individual client; this type is just referred to as an appointment. The second type is called a Group Nutrition Discussion, or Group, for short. HANDS will also track Walk-ins, which are clients who come in without appointments.

Appointments for clients are scheduled in two areas within the system, on the Appointments screen in WIC Services and in the Scheduling module.

4.7 APPOINTMENTS- WIC SERVICES



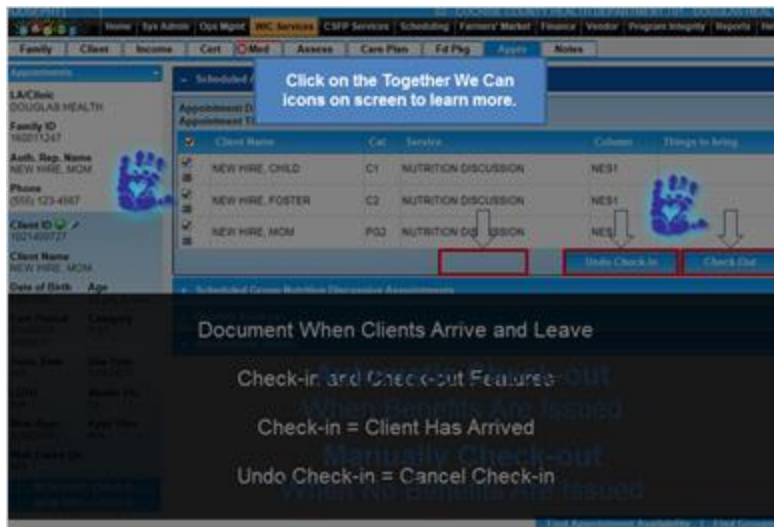
Notes:

Access appointments in WIC Services by selecting the Appointments tab in the Certification Flow Menu. This screen lists information for all of the members in a family and is divided into four sections:

1. Scheduled Appointments
2. Scheduled Group Nutrition Discussion Appointments
3. Pending Services, and
4. Appointment History

Let's explore each section.

4.8 APPOINTMENTS - SCHEDULED APPOINTMENTS



Notes:

The first section, Scheduled Appointments, lists each family member's future appointments. Here appointments can be viewed, rescheduled, or cancelled. Clients can also be checked-in on their scheduled service date.

Document the time clients arrive and leave using the Check-in and Check-out features. Select the Check-In button to indicate that the client has arrived for his or her appointment. If the client is checked in by accident, select the Undo Check-In button to cancel the check-in.

HANDS will automatically check the client out when benefits are issued. If the client was not issued benefits, select the Check-Out button to indicate that the client has completed his or her appointment.

TOGETHER WE CAN (SLIDE LAYER)

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

The Check-in and Check-out features are only available on the appointment date.

Document When Clients Arrive and Leave

Check-in and Check-out Features

Check-in = Client Has Arrived

Undo Check-in = Cancel Check-in

Close

TOGETHER WE CAN 2 (SLIDE LAYER)

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

The checkboxes next to each client in the family are automatically selected by HANDS. Ensure the correct family members are selected before clients are checked in, rescheduled, or canceled.

Document When Clients Arrive and Leave

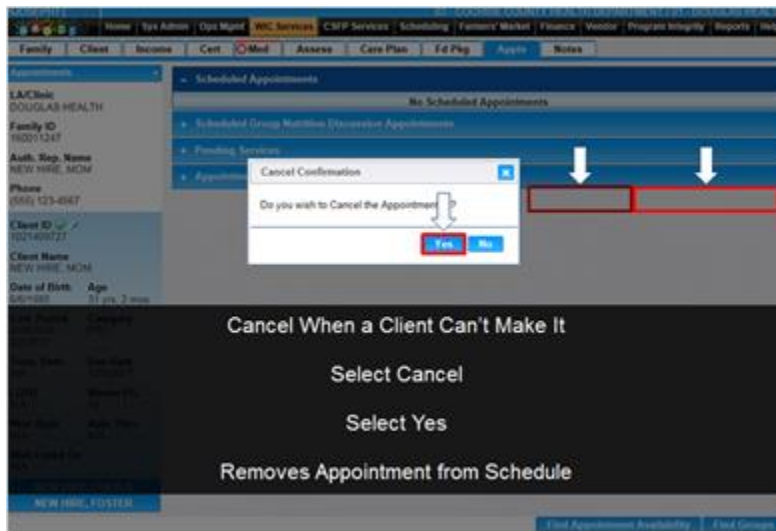
Check-in and Check-out Features

Check-in = Client Has Arrived

Undo Check-in = Cancel Check-in

Close

4.9 SCHEDULED APPOINTMENTS - RESCHEDULE AND CANCEL



Notes:

Select the Reschedule button. When a client needs to change his or her appointment. HANDS will display the Appointment Scheduler and allow you to find an appointment that works for your client. We will learn about the steps for rescheduling appointments a bit later in this module.

Select the Cancel button when a client can't make an appointment and doesn't wish to reschedule. A pop-up will display to verify the cancellation. Select Yes to remove the appointment from the schedule.

4.10 APPOINTMENTS - SCHEDULED GROUPS

Edit
Breastfeeding 101
8/22/2016
10:00 AM to 10:30 AM (30 Mins)
Enrolled 1 (max 15)

Topics: Nutrition P&B Contact (Low Risk, Non-Cast or Malnour...) Limit: 15
Family ID: 960011247 Clients: Select options Add

Client ID	Name	DOB	Category	Status
1021409727	NEW HIRE, MCM	06/06/1985	PG2	SCHEDULED

Go to page: 1 of 1 Row count: 15 Showing 1 of 1

Attend Remove Selected Attendee(s) Save Cancel

Section 2 - Scheduled Group Nutrition Discussion Appointments
Add Clients Manual attendance:
Edit to Document Attendance
Remove Clients
Automatic When Benefits Are Issued
Change Topic
View and Edit
Adjust Class Limit

- Benefits aren't issued
- Client info is added after group is held
- Group info is added after benefit issuance

Notes:

The second section is Scheduled Group Nutrition Discussion Appointments. This section lists the groups in which your client has enrolled. You'll view and edit groups in this section.

Editing a Group includes adding and removing clients from the group, changing the group topic, and adjusting the class limit. While you have all of the edit options, this area is most often used for adding and removing clients from the group.

The Edit window can also be used to document when clients attend a group. HANDS automatically marks clients enrolled in a group as Attended when benefits are issued; however, attendance can also be documented manually.

Reasons for using the Edit window for documenting client attendance include: when benefits aren't issued, the client's information is added to the group after it's held, and if the group is documented after benefits are issued.

4.11 SCHEDULED GROUPS - EDIT A GROUP

Client ID	Name	DOB	Category	Status
1021409727	NEW HIRE_MOM	06/06/1985	PG2	SCHEDULED
1021409728	NEW HIRE_CHILD	05/18/2015	C1	SCHEDULED

Notes:

To add a client to a group, start by selecting the Edit button. The Edit window displays. Choose the client you wish to add to the Group using the Clients pick list, and then select the Add button. Use this process to add one, or multiple, family members to the group. Select the Save button when you're finished.

To remove a client from a group, start by selecting the Edit button. Find his or her name on the list of Group Attendees. Select the checkbox next to the Client ID, and then select the Remove Selected Attendee(s) button. You can select one or more clients to remove at one time.

If you wish to select all of the clients within a group, select the checkbox in the header of the Group Attendees grid. Then select the Remove Selected Attendee(s) button.

Select the Save button when you're finished editing the group.

The process to document client attendance is similar to removing a client from the group. Start by selecting the Edit button. Find the client or clients that were present during the group on the list of Group Attendees. Then select the checkbox next to each Client ID, and then select the Attended button.

Select the Save button when you're finished.

VIDEO EXAMPLE (SLIDE LAYER)

Topics: **Workshop Full Contact (Low Risk, New Cast or Midcast)** Limit: **10**

Family ID: **160011247** Clients: **Select options** Add

Drop Attendees

Client ID	Name	DOB	Category	Status
1021409727	NEW HIRE, MOM	06/06/1985	PG2	SCHEDULED
1021409728	NEW HIRE, CHILD	05/15/2015	C1	SCHEDULED

Showing 1-2 of 2

Attend Remove Selected Attendee(s) Save Cancel

Do Choose Client Once

Select All Select Add y Attend

Repeat for Each Family Member

Save Close

4.12 APPOINTMENTS - PENDING SERVICES

Forgotten Items Are Added to Things to Bring

Example, Forgot Documentation in Proof of ID

Proof of Personal ID Displays in Things to Bring

HANDS Displays a Message

Add

*Client Name
FREE, PALE

*Service
MODIFICATION A

Duration
30

Things to bring
1 selected

Confirmation Message
Suggested things to bring are selected for this client.

Save Cancel

☐ TANF/HCCS/FOOD STAMP APPROVAL LETTER/CARTA DE AP...

☐ IMMUNIZATION RECORDS / CARDS/REGISTRO DE VACUNAS

☒ PROOF OF PERSONAL ID/PRUEBA DE IDENTIDAD

☐ BLOOD TEST RESULTS/RESULTADOS DE ANALISIS DE SANGRE

☐ FORMULA PRESCRIPTION RECETA PARA FORMULA ESPECIAL

Notes:

The third section is Pending Services. This is where you document which services the client needs and which items he or she needs to bring to the next visit. Information in Pending Services communicates what the client needs to other staff members and allows easy scheduling of the next visit.

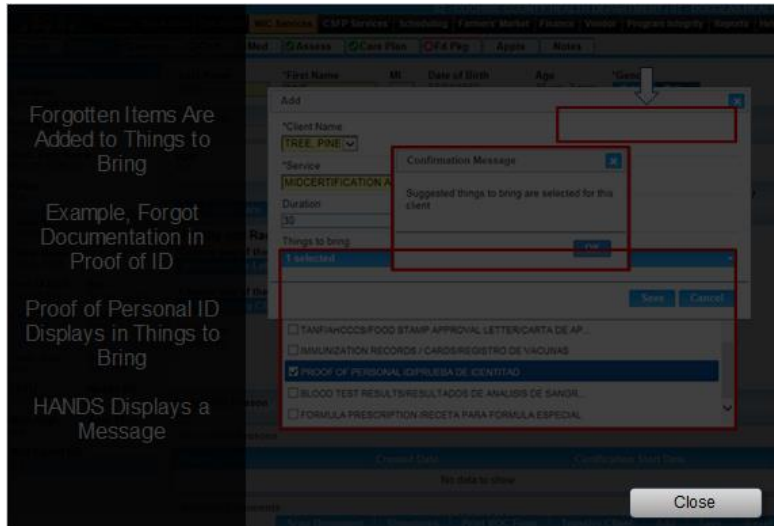
Select the Add button to document a Pending Service. Select the client from the Client Name pick list, and then select the type of visit the client needs from the Service pick list. Next, review the items in the Things to Bring pick list and edit the list if needed. Select the Save button when you're finished.

Repeat these steps to add Pending Services for additional family members.

If the client has forgotten any items and these items are documented in HANDS, they will automatically be added to Things to Bring.

For example, when Forgot Documentation is selected in the Proof of Identity pick list on the Client Registration screen, Proof of Personal ID will automatically be selected in the Things to Bring pick list. HANDS will display a message in Pending Services to let you know when items have been automatically selected.

VIDEO EXAMPLE (SLIDE LAYER)



4.13 PENDING SERVICES - SEARCH

Notes:

Search a family's Pending Services using the options at the top of the section. Use these options to search for a client, a specific service, and/or whether the Pending Service is Active or Inactive. Select the option or options you wish to find and then select the Go button. The Pending Services that fit your criteria will be listed.

VIDEO EXAMPLE (SLIDE LAYER)

4.14 PENDING SERVICES - SCHEDULE

Client ID	Client Name	Category	Service	Duration	Things to bring
1021409727	NEW HIRE MOM	P02	NUTRITION DISCUSSION	15	WIC ID FOLDER/CARPETA DE IDENTIFICACION DE WIC
1021409728	NEW HIRE CHILD A	C1	MODIFICATION ASSESSMENT	30	WIC ID FOLDER/CARPETA DE IDENTIFICACION DE WIC
1021409729	NEW HIRE FOSTER	C2	HIGH PRIORITY RISK	30	WIC ID FOLDER/CARPETA DE IDENTIFICACION DE WIC

Notes:

The Pending Services area is also used to schedule the client's next appointment. Select the Schedule button. HANDS will display the Find Appointment Availability screen. Use this screen to search for and schedule an appointment. We will learn about the steps for using this screen a little later.

VIDEO EXAMPLE (SLIDE LAYER)

4.15 APPOINTMENTS - APPOINTMENT HISTORY

Section 4 - Appointment History

Information About Past Visits

View-only

Client Name	Service Group	Date	Time	Things to bring	Status	Walk-in
NEW HIRE, FOSTER	MIDCERTIFICATION ASSESSMENT	08/29/2016	8:00 AM - 9:30 AM		RESCHEDULED	No
NEW HIRE, FOSTER	MIDCERTIFICATION ASSESSMENT	08/26/2016	9:00 AM - 9:30 AM		CANCELLED	No
NEW HIRE, CHILD	Fa B/C	08/26/2016	1:00 PM - 1:30 PM		ATTENDED	No
NEW HIRE, FOSTER	Fa B/C	08/26/2016	8:00 AM - 9:30 AM		ATTENDED	No

Lists Detailed Visit Information:

- Client
- Type of Service
- Date and Time
- Attended or Not
- Walk-in

Notes:

The fourth and final section on the Appointments screen is Appointment History. The Appointment History section lists information about the family members' past visits. This section is view-only and can't be changed.

This section lists detailed information about a client's visits, including which client had the visit, the type of service provided, the date and time of the visit, whether the client attended the visit or not, and if the visit was a walk-in.

4.16 SELF-CHECK - APPOINTMENTS SCREEN

Instructions: Match each section of the Appointments screen on the left with its purpose on the right, and then click 'SUBMIT' to check your answers.

This section contains future appointments. The appointments here can be viewed, rescheduled, or canceled. Clients can also be checked-in on the date their services are scheduled.

This section lists the groups in which your client has enrolled. View and edit groups in this section.

This section is where you document which services the client needs and which items he or she needs to bring to the next visit. This communicates client needs and allows easy scheduling of the next visit.

This section lists information about the family members' past visits.

Scheduled Appointments

Appointment Date : 08/25/2016
Appointment Time : 3:00 PM - 3:15 PM (15 Mins)

<input checked="" type="checkbox"/>	Client Name	Cat.	Service	Column	

Scheduled Group Nutrition Discussion Appointments

Breastfeeding 101:
Nutrition Ed Contact (Low Risk, Non-Cert or Mid-care)

Client ID	Name

Pending Services

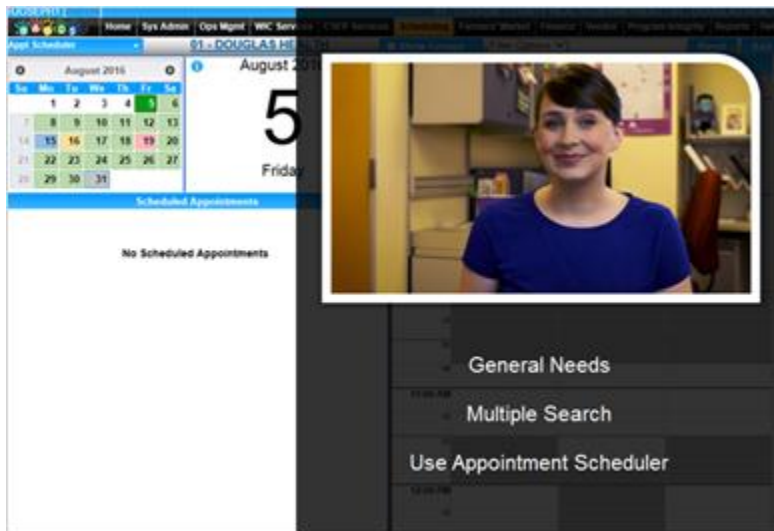
Clients: Services: ☒

Pending Services

Appointment History

Client Name	Service/Group	Date	Time
NEW HIRE, MOM	NUTRITION DISCUSSION	08/25/2016	3:00 PM - 3:15 PM
NEW HIRE	Breastfeeding		

4.17 APPOINTMENTS - SCHEDULING VISITS



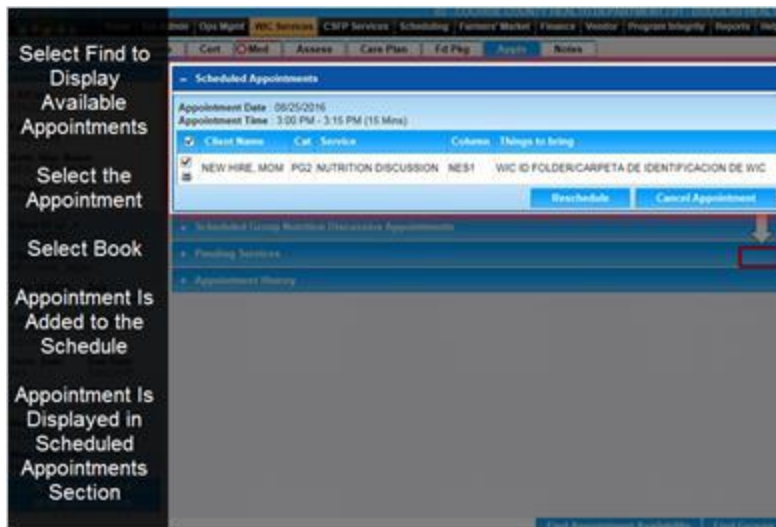
Notes:

What do you do if a client needs a very specific appointment? For example, your client needs to schedule a visit on either Tuesday or Thursday, between August 22st and August 26th. She also prefers an appointment that is around 3 in the afternoon.

When this happens, find and schedule appointments or groups using the Find Appointment Availability and Find Groups buttons on the bottom of the Appointments screen.

If the client has more general needs, or if you'll be searching multiple times, it may be better to use the Appointment Scheduler. We'll review how to use the Appointment Scheduler later in this module.

4.18 APPOINTMENTS - FIND AND SCHEDULE APPOINTMENTS



Notes:

To search for an appointment, first select the Find Appointment Availability button. The Appointment Availability Search screen displays. Narrow your search using the fields at the top of the screen. These fields include the appointment Start and End Dates, Preferred Time, Clinic, days of the week, and appointment columns.

Next, select the Add button to add information about the client and appointment needed. Select the client who needs the appointment from the Client Name pick list, choose the type of appointment from the Service pick list, and document any items the client needs to bring to the visit using the Things to Bring pick list.

HANDS will automatically fill in the Duration of the appointment; however, this field can be changed if needed.

When you're finished, select the OK button to return to the main screen. Repeat this process for each client within the family needing an appointment.

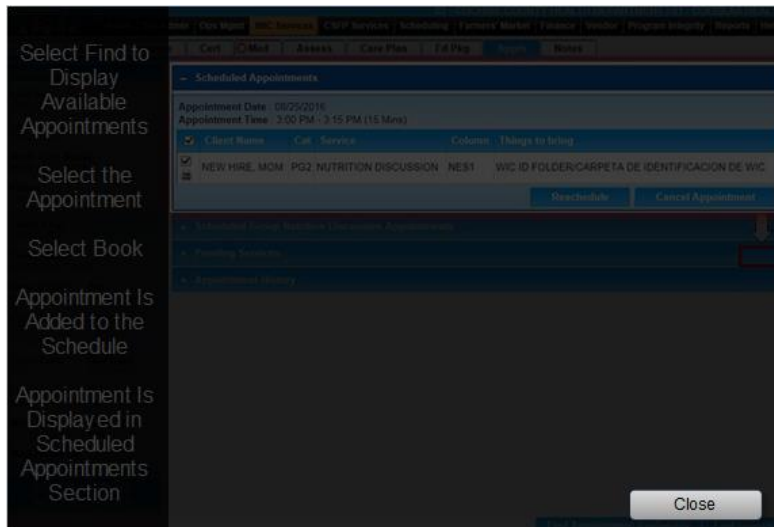
After entering search criteria and adding client information select the Find button to display the available appointments.

After the client has decided on an appointment that works, select the circle to the left of the client's name to schedule it.

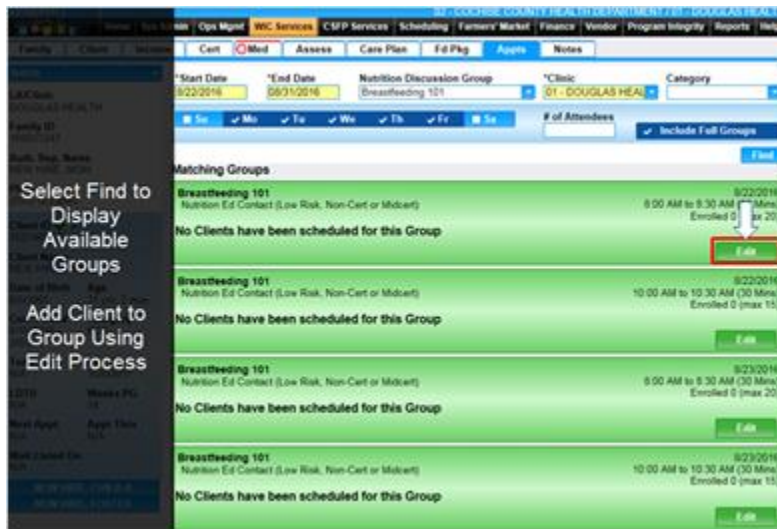
Then, select the Book button. This adds the appointment to the schedule. The appointment is also

displayed in the Scheduled Appointments section of the screen.

VIDEO (SLIDE LAYER)



4.19 APPOINTMENTS - FIND AND BOOK GROUPS



Notes:

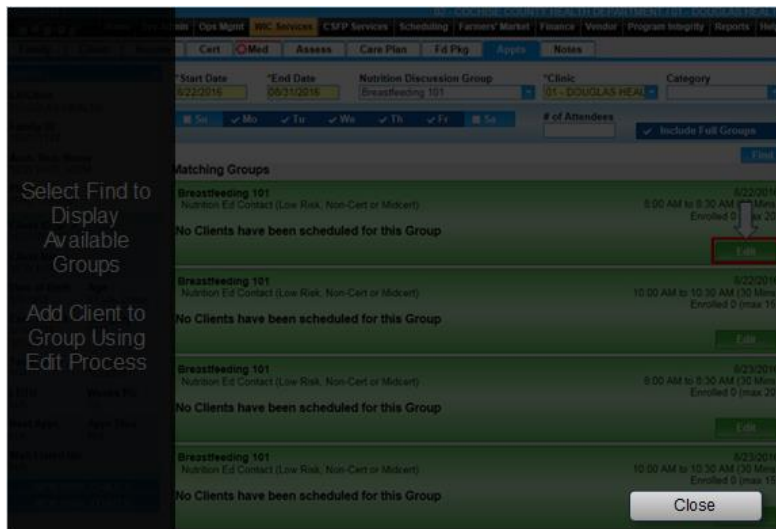
What if your client is interested in attending a group? Select the Find Groups button. The Groups Availability Search screen will display.

Like the Find Appointments process, the fields at the top of the screen are used to narrow the search. These fields include the Start and End Dates, Group Name, Clinic, Group Category, days of the week, number of group attendees, and whether or not to include groups that have met the attendance limit.

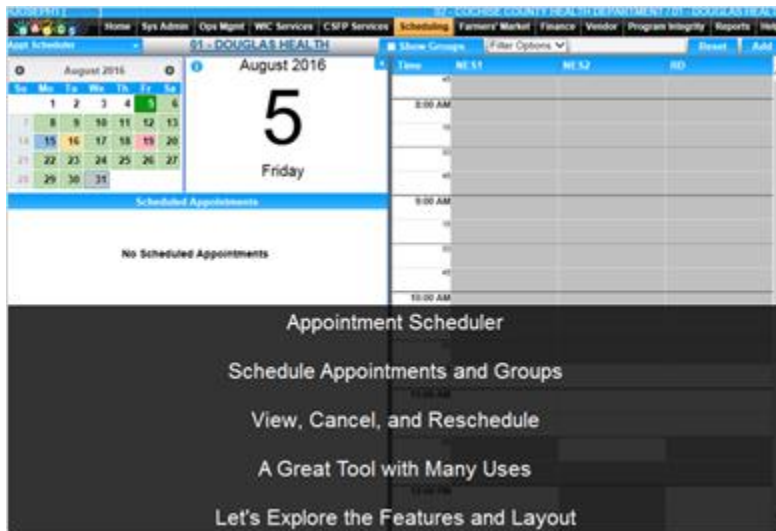
After search criteria have been entered select the Find button to display the available groups.

Once the client has selected a group that works, add the client to the group using the Edit process you learned about earlier in the module.

VIDEO EXAMPLE (SLIDE LAYER)



4.20 APPOINTMENTS - APPOINTMENT SCHEDULER



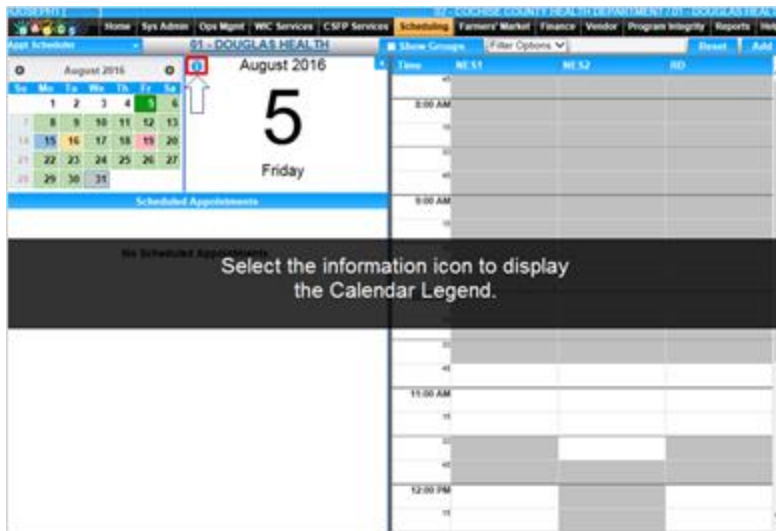
Notes:

Appointments are also scheduled for clients through the Scheduling module. Access this module using the Scheduling option in the Main Menu.

The Appointment Scheduler is the first screen displayed in the Scheduling module and is where appointments and groups are scheduled. Appointments are also viewed, cancelled, and rescheduled in this area.

The Appointment Scheduler is a great tool with many uses. Before learning about how the screen works and the ways to use it, let's explore the general features and layout.

4.21 APPOINTMENT SCHEDULER - COLOR CODING



Notes:

Let's take a look at each section of the appointment scheduler, orient you to the screen, and learn about the color-coding system. At first glance, you'll notice how colorful the Appointment Scheduler is. The colors provide information about appointment availability and type.

On the top-left of the screen is the calendar. The days on the calendar may be different colors. Each color has a different meaning.

Dark green is the day displayed on the right of the screen.

White is a day in the past.

Today's date is identified using a dark orange border.

Several colors indicate that appointments aren't available. Gray and light blue are used when the clinic is closed. Black indicates that all of the appointments are blocked, and a day will display in pink if all of the appointments have been scheduled.

Color is also used to indicate when appointments are available. Days with a lot of appointment availability are light green, while days with only a few available appointments are yellow.

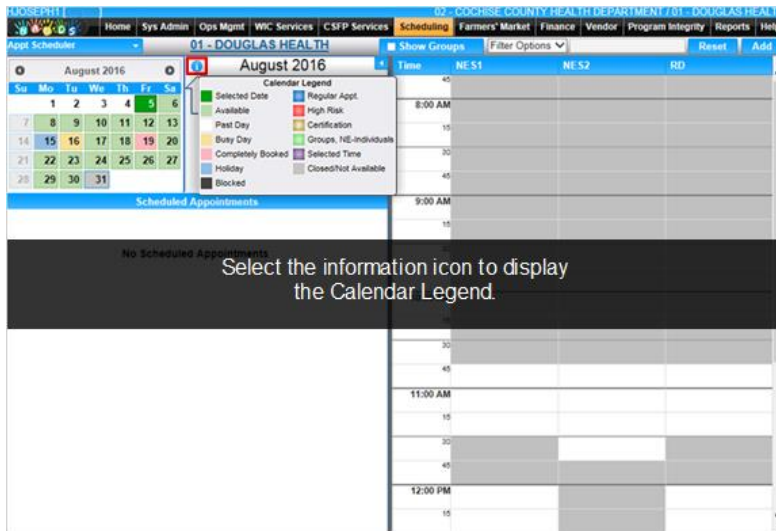
What can you do if you forget what each color means? Select the information icon to view the Calendar Legend. The Legend lists each color and its meaning.

Appointments are also color-coded. Each color identifies a different type of service. Sometimes, clients are grouped

with other family members in the appointment time slot. When this happens, the appointment will display the color of the highest priority appointment. Check the Legend in your Appointment Scheduler to see the color coding for your Agency.

Now you try it. Select the information icon to display the Calendar Legend.

COLOR CODE (SLIDE LAYER)



4.22 SELF-CHECK - COLOR CODING

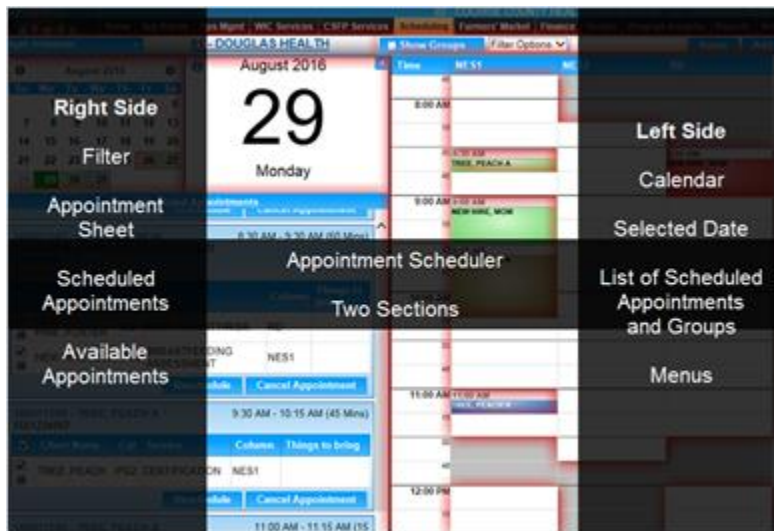
Instructions: Match each calendar color on the left with its meaning on the right, and then click 'SUBMIT' to check your answers.

Gray/Blue	The schedule is full
Yellow	There is some appointment availability
Black	There is a lot of appointment availability
Pink	The clinic is closed
Light Green	The schedule is blocked



The screenshot shows a scheduling software interface. On the left, there is a calendar for August 2016. The date August 5th is highlighted with a large number '5' and the word 'Friday'. To the right of the calendar, there is a detailed view of the schedule for August 5th, showing a grid of time slots and appointment slots. The interface includes a menu bar at the top with options like Home, Site Admin, Clinic Mgmt, etc. Services, and a toolbar with buttons like Show Groups, Filter Options, and Add.

4.23 APPOINTMENT SCHEDULER - OVERVIEW



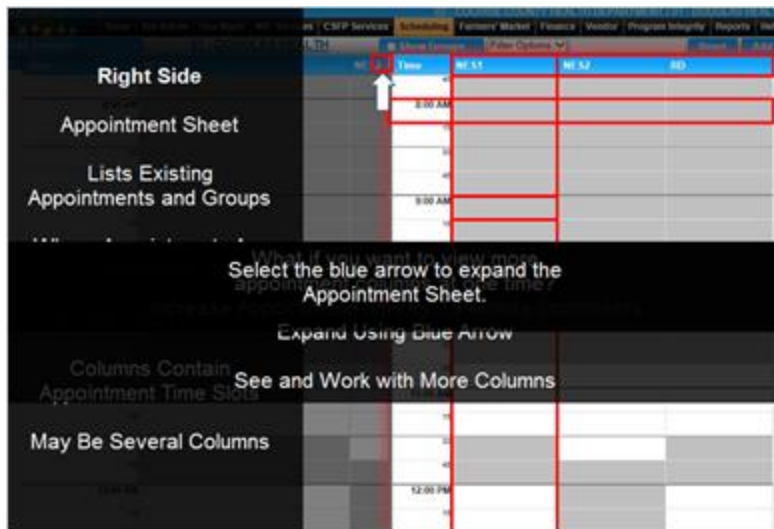
Notes:

The Appointment Scheduler is divided into two sections. The left side of the screen contains the calendar, the selected date, and a list of scheduled appointments and groups. This section also contains menus to assist you.

The right side of the screen contains a filter menu, and the Appointment sheet, which lists appointment slots for each day. It will show which appointments are scheduled and which are available.

Let's explore each section a bit more.

4.24 APPOINTMENT SCHEDULER - APPOINTMENT SHEET



Notes:

Let's start with the right side of the screen. The Appointment Sheet can be found here. The Appointment Sheet lists existing appointments and groups. This is also where appointments are scheduled.

The sheet is divided into columns, and each column contains appointment time slots. There may be several columns on the schedule sheet, each one with a unique name.

Notice that each time slot on the Appointment Sheet is 15 minutes. This is the shortest appointment time. Appointment time can be increased by fifteen minute increments. We will learn how to do this in a few minutes. What if you want to view more appointment columns at one time? Expand the Appointment Sheet by selecting the small, blue arrow next to the upper left corner of the sheet. Now you can see and work with more appointment columns.

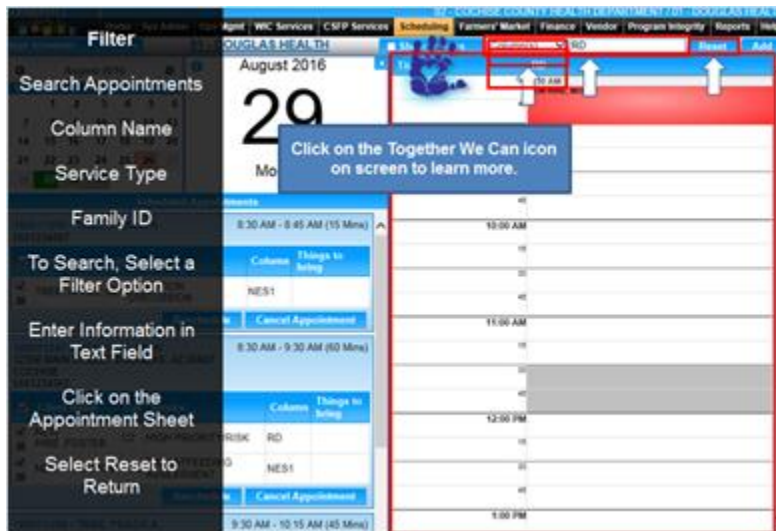
Now you try it. Select the blue arrow to expand the Appointment Sheet.

EXPAND (SLIDE LAYER)

The screenshot displays a scheduling application window titled "01 - DOUGLAS HEALTH". The interface features a menu bar at the top with various options: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, Reports, and Help. Below the menu bar, there are buttons for "Show Groups", "Filter Options", "Reset", and "Add". The main area is a grid with three columns labeled "NE S1", "NE S2", and "RD". The rows represent time slots, starting from 8:00 AM and ending at 12:00 PM. The grid cells are shaded in a light gray color, indicating a schedule or availability. The interface also includes a "Time" column on the left side, which lists the time slots in 15-minute increments.

Time	NE S1	NE S2	RD
8:00 AM			
8:15			
8:30			
8:45			
9:00 AM			
9:15			
9:30			
9:45			
10:00 AM			
10:15			
10:30			
10:45			
11:00 AM			
11:15			
11:30			
11:45			
12:00 PM			

4.25 APPOINTMENT SCHEDULER - FILTER



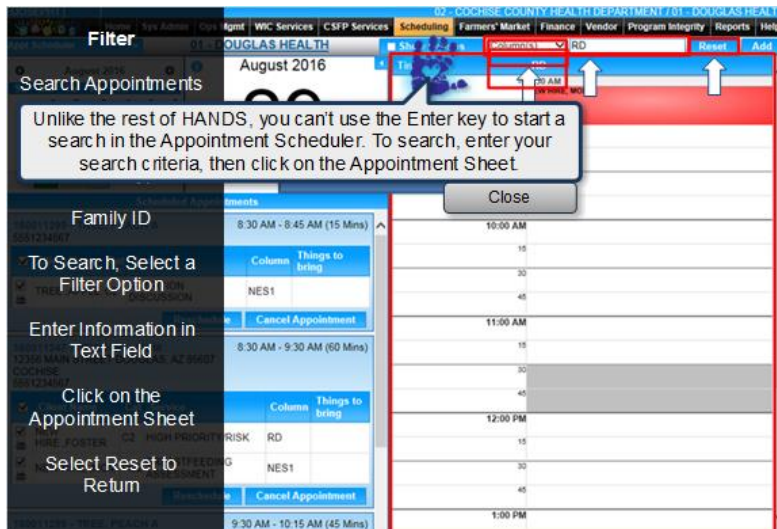
Notes:

Above the appointment columns, there is a pick list that says Filter Options and an empty field to enter data. Use this feature to search through appointments by Column Name or Service Type. Use the Family ID option to find a family's existing appointment.

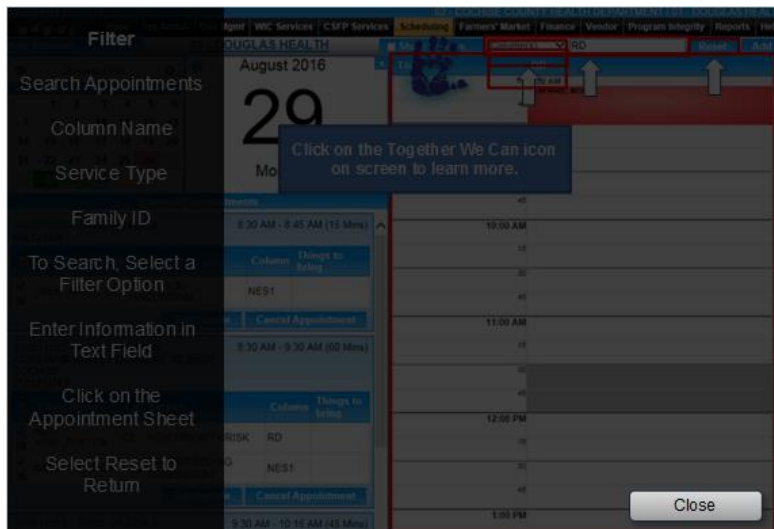
To search, select an item from the Filter Options pick list. Enter what you are looking for in the text field next to the pick list. For our example, we are looking for RD columns. After you've entered search information, click on the Appointment Sheet to display the search results.

Select the Reset button to return the screen to normal view.

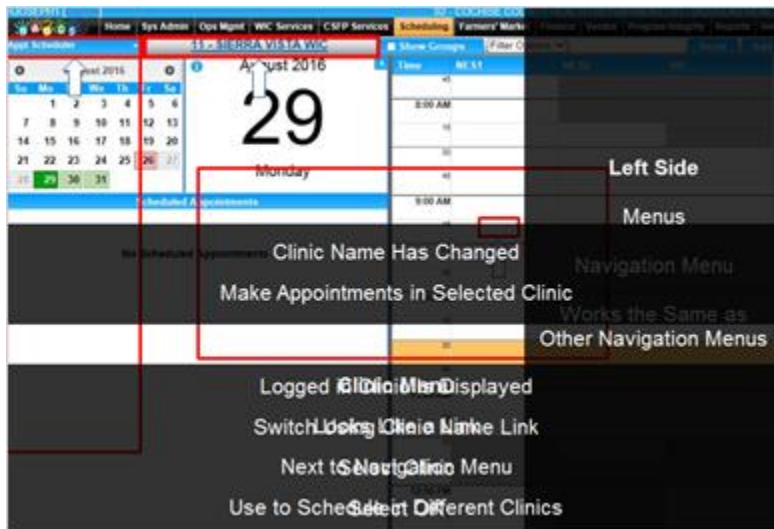
TOGETHER WE CAN (SLIDE LAYER)



VIDEO EXAMPLE (SLIDE LAYER)



4.26 APPOINTMENT SCHEDULER - MENUS



Notes:

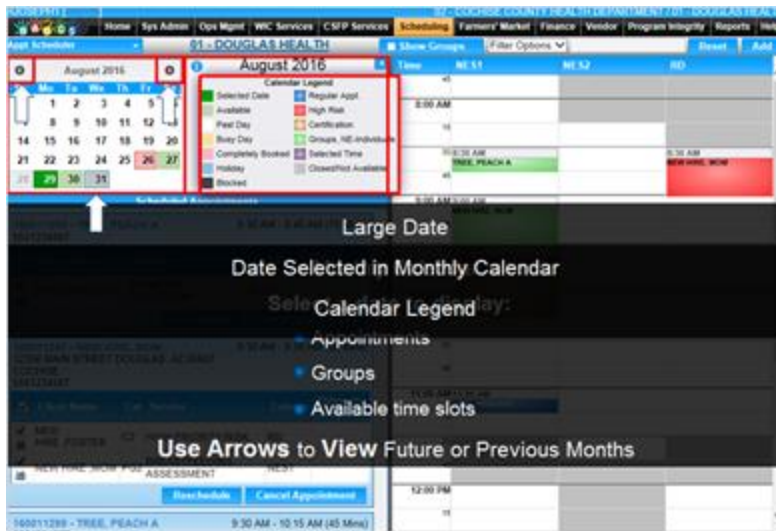
Now let's look at the left side of the screen. Notice the two menus in the top-left section of the screen. The first, in the upper-left corner of the screen, is the Navigation menu. It works the same as the other navigation menus you learned about in Module 1. Use this menu to navigate throughout the Scheduling module.

The second menu is the Clinic menu. This menu looks like a link and is located next to the Navigation menu. Use the Clinic menu to schedule appointments in different clinics without having to log-out and back into the system.

The clinic you logged into is automatically displayed in the Clinic menu. Switch to a different clinic by selecting the clinic name. This opens the clinic selection window. Select the clinic you wish to use to schedule appointments, then select the OK button.

Notice that the clinic name has changed, and you can now make appointments in the selected clinic.

4.27 APPOINTMENT SCHEDULER - CALENDAR AND DATE



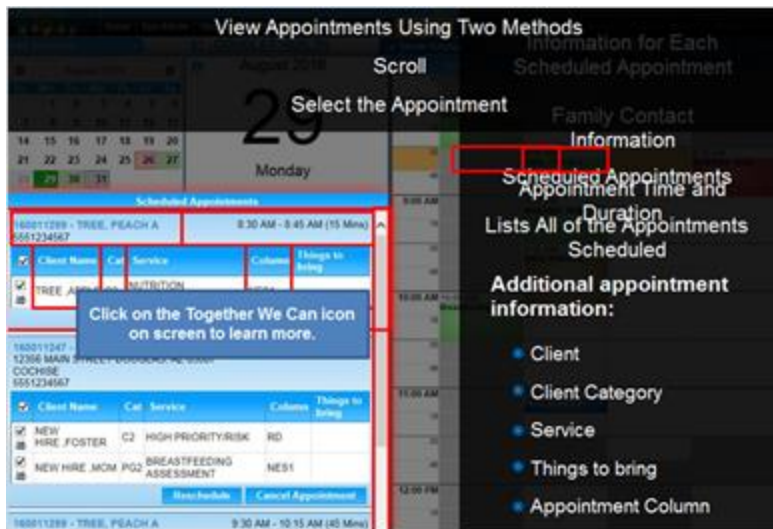
Notes:

The monthly calendar is below the menus. Select a date on the calendar to display the appointments, groups, and available time slots in the Appointment Sheet.

Use the small arrows in the top corners of the calendar to view previous and future months.

Next to the calendar is a large date. This is the date that is selected in the monthly calendar. The Calendar Legend that was discussed is also located here.

4.28 APPOINTMENT SCHEDULER - SCHEDULED APPOINTMENTS



Notes:

The Scheduled Appointments area is also on the left-hand side of the screen. This area lists all of the appointments scheduled for the calendar date you've selected.

Information for each scheduled appointment is included. Family contact, appointment time and duration, and additional appointment information are listed.

This information includes each client attending the appointment, the client's category, the service to be provided, and items the client needs to bring to the appointment. The appointment column in which the client is scheduled is also displayed.

View appointments in this area using two different methods. Scroll to find what you need, or select an appointment or group in the Appointment Sheet to bring its information to the top of the Scheduled Appointments area.

TOGETHER WE CAN (SLIDE LAYER)

View Appointments Using Two Methods

Scroll

Select the Appointment

29

Monday

Scheduled Appointments

160011299 - TREE, PEACH A
5551234567 8:30 AM - 8:45 AM (15 Mins)

Client Name Cat Service Column Things to bring

✓ TREE APP NUTRITION

Click on the on scr

What do you do if you need more information about a client who is coming in for an appointment? View the client's record by selecting the Family ID in the Scheduled Appointments area.

Information for Each Scheduled Appointment

Family Contact Information

Scheduled Appointments Appointment time and Duration

Lists All of the Appointments Scheduled

Additional appointment

Client Category Close

Service

Things to bring

Appointment Column

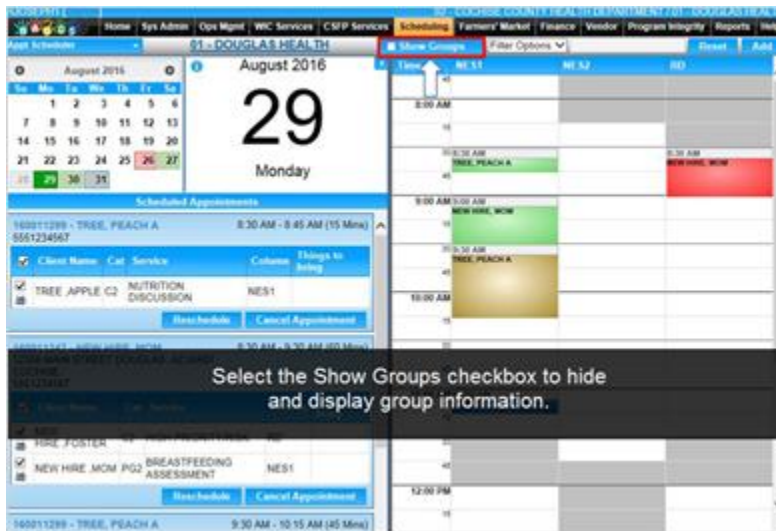
Client Name	Cat	Service	Column	Things to bring
✓ NEW HIRE_FOSTER	C2	HIGH PRIORITY/RISK	RD	
✓ NEW HIRE_MOM	PO2	BREASTFEEDING ASSESSMENT	NES1	

Reschedule Cancel Appointment

160011299 - TREE, PEACH A 9:30 AM - 10:15 AM (45 Mins)

11:00 AM 12:00 PM

4.29 SCHEDULED APPOINTMENTS - GROUPS



Notes:

Groups for the day are listed in the Scheduled Appointments section as well. Group information is hidden on the schedule. To display groups select the Show Groups checkbox at the top of the screen.

Group information includes the date, time, and duration of each group, as well as the group name and the number of enrollees.

Client details will display if there are clients enrolled in the group. These details include Client ID, Name, Date of Birth, and Category.

Now it's your turn. Select the Show Groups checkbox to hide and display group information.

SHOW GROUPS (SLIDE LAYER)

COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS HEALTH

01 - DOUGLAS HEALTH

August 2016

29 Monday

Scheduled Appointments

Breastfeeding 101 8/29/2016 8:00 AM to 8:30 AM (30 Mins) Enrolled 0 (max 20)

No Clients have been scheduled for this Group

160011299 - TREE, PEACH A 8:30 AM - 8:45 AM (15 Mins) 5551234567

Client Name	Cat	Service	Column	Things to bring
TREE, APPLE C2		NUTRITION DISCUSSION	NES1	

Reschedule Cancel Appointment

160011247 - NEW HIRE, MOM 8:30 AM - 9:30 AM (60 Mins) 5551234567

Client Name	Cat	Service	Column	Things to bring
NEW HIRE, FOSTER	C2	HIGH PRIORITY/RISK	RD	

Time Group 1 NE S1 NE S2 RD

8:00 AM 8:00 AM Breastfeeding WH

8:30 AM TREE, PEACH A 8:30 AM NEW HIRE, MOM

9:00 AM 9:00 AM NEW HIRE, MOM

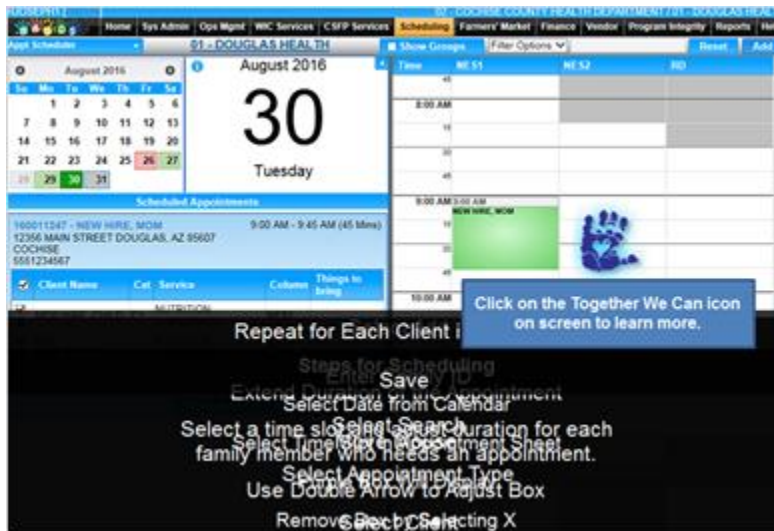
9:30 AM TREE, PEACH A

10:00 AM 10:00 AM Breastfeeding WH

11:00 AM 11:00 AM TREE, PEACH A

12:00 PM

4.30 APPOINTMENT SCHEDULER - SCHEDULE



Notes:

Now that you know your way around the Appointment Scheduler screen, let's go through the steps of scheduling an appointment.

Select the date for the desired appointment from the calendar. Select the time slot you need in the Appointment Sheet. A purple box will display in the selected area.

If the time slot chosen was incorrect, remove the purple box by selecting the X in the top-right corner of the time slot.

To extend the duration of an appointment, move the mouse toward the bottom of the box until you see a double arrow, then drag the bottom of the box down to match the duration of the appointment needed.

Select a time slot and adjust duration for each family member who needs an appointment.

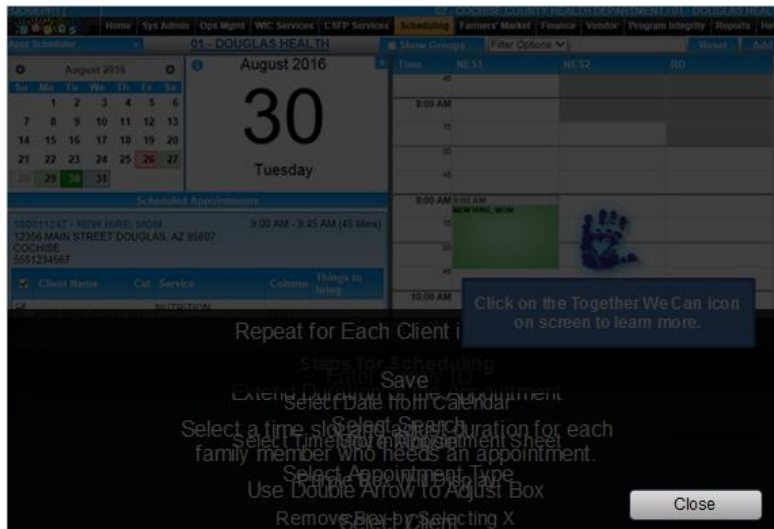
Next, select the Add button at the top right-hand corner of the screen. The Add pop-up displays. Enter the Family ID, and select the Search button. This retrieves the family information.

Then, select the appointment type from the Service pick list. Next, select the client from the Client pick list.

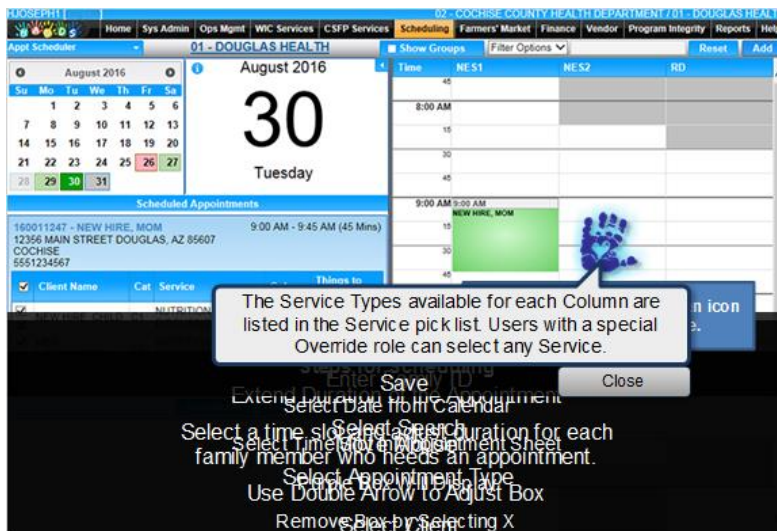
Repeat this process for each client in the family who needs an appointment.

When finished, select the Save button to add the appointments to the schedule.

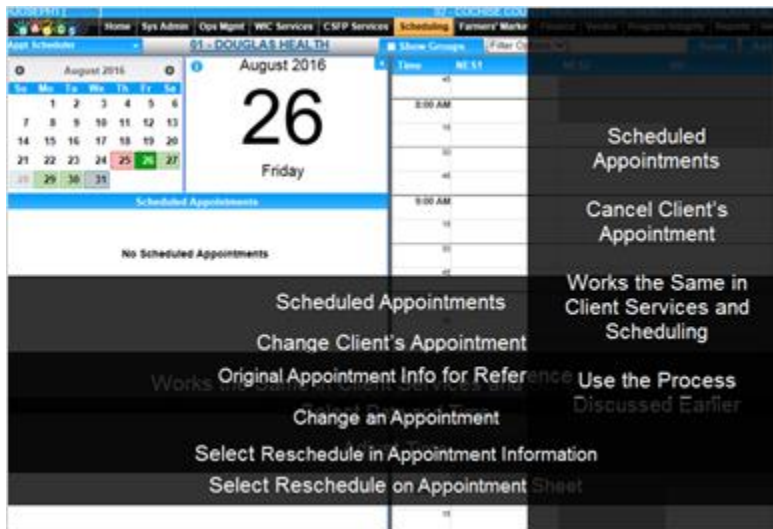
VIDEO (SLIDE LAYER)



TOGETHER WE CAN (SLIDE LAYER)



4.31 APPOINTMENT SCHEDULER - RESCHEDULE AND CANCEL



Notes:

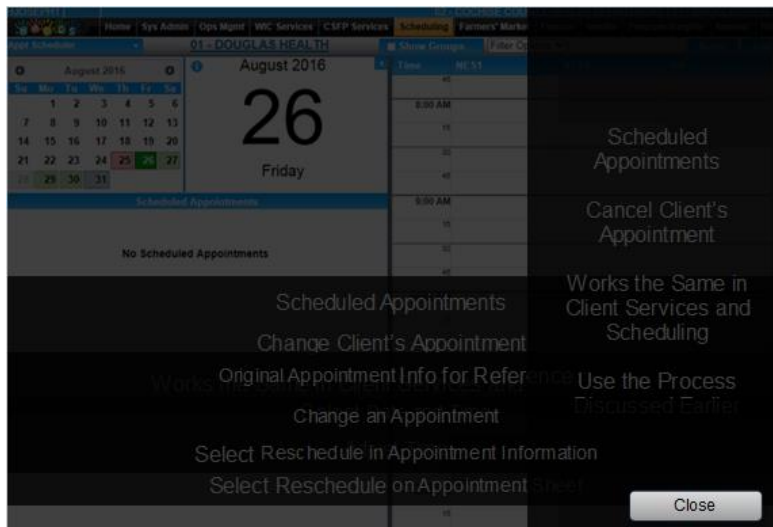
Use the Scheduled Appointments area to change a client's appointment. These processes work the same in both the Client Services and Scheduling modules.

To change an appointment, select the Reschedule button located in the client's appointment information. The original appointment information is listed in the Scheduled Appointments area for reference.

Use the Appointment Sheet to select the date and time that works for the client, and adjust the time slot duration. Select the Reschedule button in the Appointment Sheet to complete the process.

The Scheduled Appointments section is also used when a client needs to cancel an appointment. To cancel a client's appointment, use the same process discussed earlier in this module.

VIDEO EXAMPLE (SLIDE LAYER)



4.32 SELF-CHECK APPOINTMENT SHEET


Instructions: Select the best answer, and then click 'SUBMIT' to check your answer.

How long is each time slot on the Appointment Sheet?

☐ 10 minutes

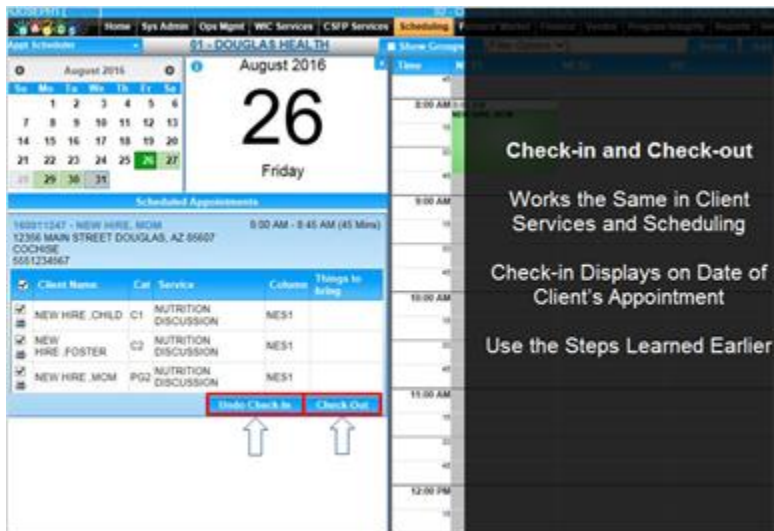
☐ 15 Minutes

☐ 20 Minutes



The screenshot shows a software interface for appointment scheduling. At the top, there's a navigation bar with tabs like Home, Sys Admin, Opt Mgmt, WIC Services, CSFP Services, Scheduling (selected), Farmers' Market, Finance, Vendor, Program Integrity, and Reports. Below the navigation bar, the main area is divided into three sections. The left section shows a calendar for August 2016 with days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and dates. The middle section displays a large number '5' for Friday, August 5th, 2016. The right section is a table with columns for Time, MT 51, MT 52, and RD. The table has rows for 8:00 AM, 9:00 AM, 10:00 AM, 11:00 AM, and 12:00 PM.

4.33 APPOINTMENT SCHEDULER - CHECK-IN AND CHECK-OUT

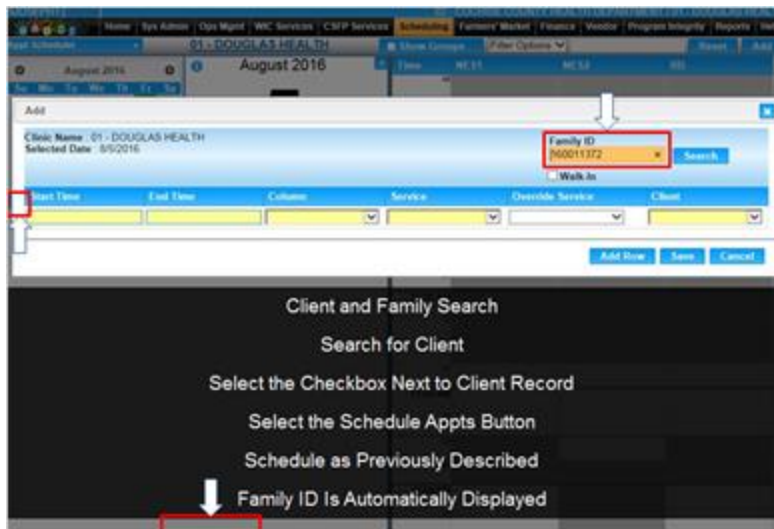


Notes:

The Check-in and Check-out processes also work the same in both the Client Services and Scheduling modules.

The Check-In button will display in the Scheduled Appointments section on the date of the client's appointment. Use the steps you learned earlier to check-in, undo check-in, and check-out clients.

4.34 CLIENT AND FAMILY SEARCH - SCHEDULE



Notes:

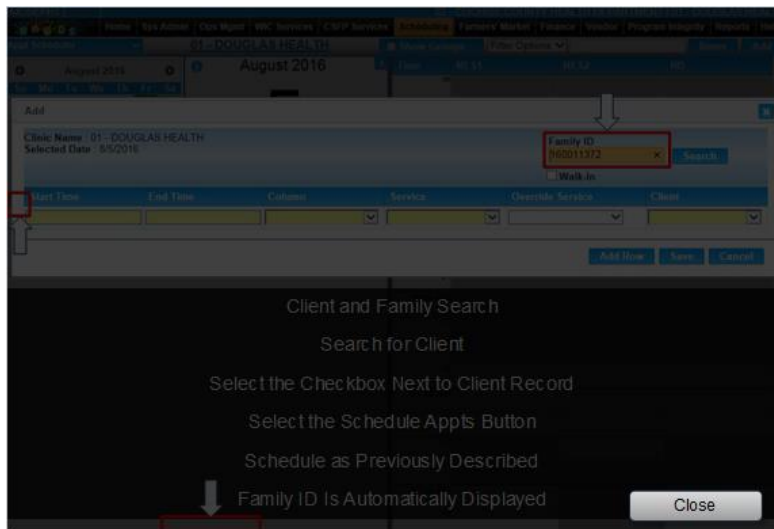
Appointments can also be scheduled through the Client and Family Search screen.

To schedule, search for your client, and then select the checkbox next to the client record in the far left of the search results grid.

Next, go to the Scheduling module by selecting the Schedule Appointments button.

Once in the Appointment Scheduler, schedule the appointment as previously described. Notice that the Family ID is automatically displayed in the Add window, saving you time.

VIDEO EXAMPLE (SLIDE LAYER)



4.35 APPOINTMENT SCHEDULER - WALK-INS

Walk-ins Documented in HANDS
Similar to Creating an Appointment
Select Add
Select Walk-in Checkbox
Enter Family ID, and Select Search
Like appointments, walk-ins can be added using the Client and Family Search screen.
Add Additional Family Members
Save

Notes:

Walk-ins are another visit type that can be documented using HANDS. Recording a walk-in is similar to creating an appointment.

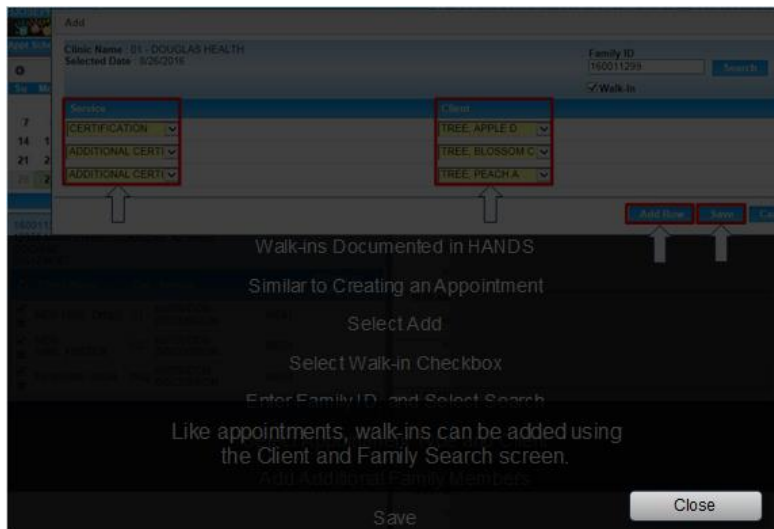
When a client comes into the clinic for services, but doesn't have an appointment, select the Add button on the Appointment Sheet. This will display the Add Window.

Select the Walk-in checkbox. Next, enter the Family ID and select the Search button to retrieve family information.

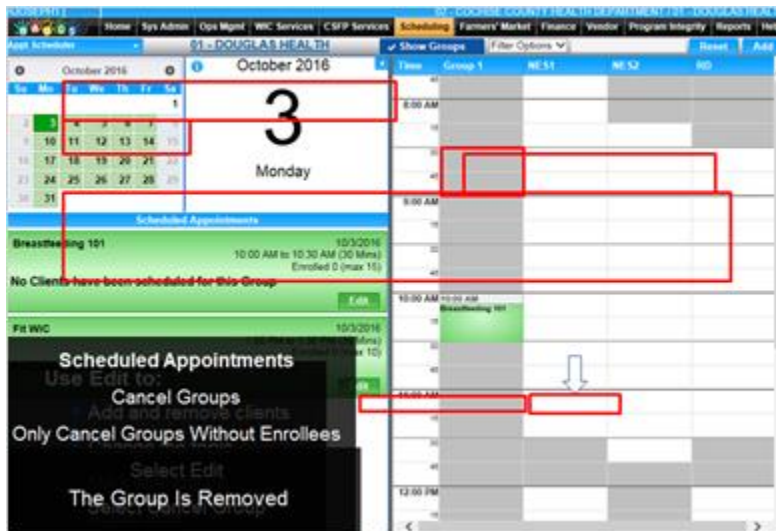
Then, select the appointment type from the Service pick list and the client from the Client pick list. Add additional family members by selecting the Add Row button.

When finished select Save to check-in the client. Like appointments, walk-ins can be added using the Client and Family Search screen. Just follow the steps you learned previously.

VIDEO EXAMPLE (SLIDE LAYER)



4.36 APPOINTMENT SCHEDULER - GROUPS



Notes:

Groups listed in the Scheduled Appointments section can be edited. The edit process in this section works the same as the process you learned for the Appointments screen in the Client Services module. Use edit to add and remove clients from the group, change the group topic, mark attendance, and adjust the group limit.

Groups are also canceled in the Scheduled Appointments section. Only groups without enrollees can be canceled.

To cancel a group, select the Edit button. The Edit window will display. Select the Cancel Group button. This removes the group from the calendar.

4.37 SELF-CHECK - SCHEDULING APPOINTMENTS

Instructions: Select the best answer(s), and then click 'SUBMIT' to check your answer(s).

In which two areas of HANDS are appointments scheduled? Select the two answers that apply.

- ☒ WIC Services
- ☒ Scheduling
- ☐ Family Information
- ☐ Care Plan

[Home](#) [Sys Admin](#) [Ops Mgmt](#) [WIC Services](#) [CMP Services](#) [Scheduling](#) [Farmers Market](#) [Finance](#) [Vendor](#) [Program Integrity](#) [Reports](#)

[Policy and Procedure Manual \(N/F PNP\)](#) [WIC Code Manual](#) [AZ WIC](#) [Password Help](#)

Meet the WIC Service Desk!
—
William Erickson

WIC Service Desk
Monday - Friday 7AM - 5PM
Toll-free 800-576-5766

4.38 SUMMARY



Notes:

Great Job! You've completed Module 7 of the HANDS New Hire course.

In this module, you learned how to view, schedule, reschedule, and cancel appointments. You know how to document walk-ins.

You learned about editing group discussions, documenting Pending Services, and viewing Appointment History

You also understand the importance of quality customer service and connecting with the client when scheduling appointments.

In the next module, we'll learn about the Precertification and Transfer processes.

MODULE 8 - PRECERTIFICATION

5.1 PRECERTIFICATION



Notes:

Now that you've learned about the HANDS screens you'll use most often, it's time to learn about some useful screens that you may not use every day.

Although these screens are not used as often as the screens we've learned about so far, they still play vital roles in providing services to our clients.

In this module, you'll learn about using HANDS to pre-screen clients for the WIC Program. This pre-screening is also known as precertification.

In addition, we'll learn about using HANDS to transfer clients within your State Agency and from other states.

5.2 INTRODUCTION TO PRECERTIFICATION

The screenshot shows a web-based form for WIC Services Precertification. The form includes sections for Clinic selection, Authorized Representative information, Proof of Address, and Mailing Address. A large, semi-transparent overlay box is centered on the screen with the text: "Let's Take a Look", "Similar to Screens in WIC Services", "Function the Same", and "A Lot of the Same Fields". The bottom of the screen features an "Appointment Reminder Preference" section and buttons for "Print Proxy Form", "Save", "Cancel", and "Close".

Notes:

First, let's learn about the Precertification screens. These screens are located in the Scheduling module and have a couple of uses.

You can use the screens to determine if a client meets the basic eligibility requirements for the WIC Program.

The screens are also used to create family and client records in order to schedule appointments for potential participants.

When you are ready to certify the client, all of the information entered in the Precertification screens will be available in the WIC Services module.

There are three Precertification screens: Family Information, Client Registration, and Income Eligibility. The screens are similar to the Family Information, Client Registration, and Income Eligibility screens in the Certification Flow Menu in WIC Services.

The screens function the same and have a lot of the same fields as the screens in the Certification Flow screens.

Let's take a look at each of these screens.

5.3 PRECERTIFICATION - FAMILY INFORMATION

The screenshot shows a web-based form titled 'Family Information'. At the top, there's a navigation bar with links like 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSP Services', 'Scheduling', 'Farmers Market', 'Finance', 'Vendor', 'Program Integrity', 'Reports', and 'Help'. Below the navigation bar, the form is divided into several sections. The 'Family Information' section includes fields for 'Family ID', 'Family Size' (highlighted with a red box), and 'Clinic' (highlighted with a red box). Below this, there are sections for 'Authorized Representative 1' and 'Authorized Representative 2', each with fields for 'Last Name', 'First Name', and 'MI'. The 'Initial Contact' section has checkboxes for 'Walk-In', 'Phone', 'Migrant', and 'Homeless'. There are also fields for 'Email Address' and a 'Do Not Email' checkbox. The 'Street Address' and 'Mailing Address' sections have a 'Do Not Send Mailings' checkbox and a 'Copy Street To Mailing' button. Below these, there's a 'Family Size' section with a dropdown menu. The 'Authorized Reps' section has a table with columns for 'Last Name', 'First Name', 'MI', 'Phone', and 'Primary'. The 'Contact Information' section has fields for 'Primary Language' and 'Secondary Language'. At the bottom, there's a 'Following Confidentiality' notice.

Notes:

The Family Information screen in the Precertification module has a lot of the same fields as the Family Information screen in WIC Services. The screen also has some additional fields to help determine client eligibility.

These fields include Family Size, Initial Contact, and the Migrant and Homeless checkboxes.

Like the Family Information screen in WIC Services, this screen is used to enter basic information about your client's family. First, enter the Family Size and select a clinic in which to enroll the family.

Then document information about the family's Authorized Representatives, contact information, and confidentiality. Record whether the client called, or walked in, and if the family is migrant and/or homeless.

5.4 FAMILY INFORMATION - OTHER INFORMATION

How did you hear about WIC?

From Where Family Was Referred:

- Program
- Organization

Add

Program
[ARHOCOS]

Organization
COCHISE COUNTY HEALTH & SOCIAL SERVICES

OK Cancel

Languages

Primary Language
2 - SPANISH

Secondary Language
1 - ENGLISH

Interpreter Required

Appointment Reminder Preference

Email Text

How did you hear about WIC?

Notes:

Other items that need to be added include the family's languages, whether they need an Interpreter, and appointment reminder preferences.

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

5.5 PRECERTIFICATION - CLIENT REGISTRATION

The screenshot shows a web application interface for Precertification Client Registration. The top navigation bar includes links like Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers Market, Finance, Vendor, Program Integrity, Reports, and Help. The main form is titled 'Client Information' and contains several sections: 'Client Information' with fields for Last Name (NEW HIRE), First Name (PRECERT), MI (M), Date of Birth (2/2/1987), Age Years (29), Age Months (8), Gender (M), Family ID (160011746), Auth. Rep. Name (NEW HIRE, PRECERT), Phone (978) 555-5555, Client ID (21021415607), and Client Name (NEW HIRE, PRECERT M). Below this is a section for 'Mother's ID' and 'Mother outside of Family' with a 'Disability' checkbox. The 'Category' dropdown is set to 'P02 (PREGNANT ADULT (18 AND OVER))' and 'Exp. Pri.' is '1 - PRIORITY 1'. There are checkboxes for 'Foster Care' and 'Has the child entered into foster care, or changed foster care homes, within the last 6 months?'. The 'Program' dropdown is set to 'CSFP'. At the bottom, there is a large black banner with white text that reads 'Complete the fields in WIC Services' and 'Use Add Button on Client Registration'. Below the banner are 'Add', 'Save', and 'Reset' buttons.

Notes:

After adding your new family on the Family Information screen, add clients to the family using the New Client button.

Like the screen in WIC Services, the Client Registration screen in Precertification is where basic information about your client is documented.

The screen looks a bit different in Precertification than it does in WIC Services. Only fields needed to determine basic eligibility are included.

The screen has a few added fields too, including Category, Expected Priority, and Program. Complete the fields as you would complete them in WIC Services, and then select Save.

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.

5.6 CLIENT REGISTRATION - MOTHER AND CHILD LINKAGE

Family | Client | Income

Last Name: NEW HIRE | First Name: PRECART CHILD | MI: C

Date of Birth: 05/05/2014 | Age Years: 2 | Age Months: 1 | Gender: M

Disability: ☐ | Category: C2 (2 YEAR OLD CH) | Priority: 3

Has the child been in the program within the last 6 months? ☐

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

Use one of two fields:

- Mother's ID field
 - Lists clients in the family
- Mother Outside of Family field
 - Clients outside of the family

Save | Cancel

Notes:

Client Registration is also where mothers are linked to her children. If the mother is a client in HANDS, link her to her children using one of two fields.

Use the Mother's ID field to select from the eligible clients in the family.

Type a Client ID into the Mother outside of Family field if the mother of the client is not a member of the family but participates in WIC.

TOGETHER WE CAN (SLIDE LAYER)

The screenshot shows a software interface for adding clients to a family. The interface includes a navigation bar at the top with options like Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, Reports, and Help. The main form has fields for Last Name, Date of Birth, Disability, Category, and Priority. A 'Close' button is visible. Two callout boxes provide instructions: one about adding the mother first and another about the 'Together We Can' icon. A dark overlay at the bottom explains the 'Use one of two fields:' options.

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.

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

Use one of two fields:

- Mother's ID field
 - Client Register will show where mothers are
 - Lists clients in the family
- Mother Outside of Family field
 - Clients outside of the family

Save Reset Cancel

5.7 PRECERTIFICATION - INCOME

Use the Process You Learned Previously
Determine If a Family May Qualify for WIC

Family ID: 16011746
Auth. Rep. Name: NEW HIRE, PRECER
Phone: (928) 555-5555

Client ID: 21021410612
Client Name: NEW HIRE, PRECER CHILD 2
Date of Birth: 4/5/2013
Age: 3 years, 6 months
Cert. Period: N/A
Category: C3
Term. Date: N/A
Due Date: N/A
LDTU: N/A
Weeks PG: N/A
Next Appt.: N/A
Approval Date: N/A

Adjust Eligibility

Members	APPLICANTS	FORM	SECTION 8	SNAP/FOOD STAMPS	SNAP
NEW HIRE, PRECER M	PART PROOF	REFERRED	REFERRED	PART NO PROOF	REFERRED
NEW HIRE, PRECER CHILD C	PART PROOF	REFERRED	REFERRED	PART NO PROOF	REFERRED
NEW HIRE, PRECER CHILD 2	PART PROOF	REFERRED	REFERRED	PART NO PROOF	REFERRED

Income

Providers [Add](#)

Income Provider	Amount	Interval	Hours Per Week	Documentation	Monthly
PRIMARY PROVIDER	\$2,000.00	M - MONTHLY		4 AHOCBS/TANF/SNAP/SECTION 8 AWARD LETTER	\$2,000.00
STATE OF ARIZONA	\$750.00	M - MONTHLY		17 FOSTER CARE PLACEMENT LTR (WARRANT STUB)	\$750.00

Monthly Income Breakdown

Member	Monthly Income	Provider Details
NEW HIRE, PRECER M	\$2,000.00	Details
NEW HIRE, PRECER CHILD C	\$2,000.00	Details
NEW HIRE, PRECER CHILD 2	\$750.00	Details

[Migrate](#) [Save](#) [Reset](#)

Notes:

The last of the Precertification screens is the Income Eligibility screen, or Income screen, for short. The Income screen in Precertification is exactly the same as the Income screen in WIC Services. However, in Precertification, this screen is optional.

Just like the Income screen in WIC Services, all family members' income eligibility information is documented on this screen.

This information includes Family Size information, Adjunct Eligibility or referrals to Adjunctively Eligible programs, household income, and other eligibility information.

Complete the screen using the process you learned previously to determine if a family may qualify for the WIC program based on income.

ENGLISH (SLIDE LAYER)

JOSEPH H | Home | Sys Admin | Ops Mgmt | WIC Services | CSFP Services | **Schedule** | Farmers' Market | Finance | Vendor | Program Integrity | Reports | Help

Family | Client | **Enrollment**

Use the Process You Learned Previously

English Metric

LA/Clinic
N/A

Family ID
160011746

Auth. Rep. Name
NEW HIRE, PRECERT

Phone
(928) 555-5555

Client ID
21021410612

Client Name
NEW HIRE, PRECERT CHILD 2

Date of Birth
4/5/2013

Age
3 years, 6 months

Cert. Period
N/A

Category
C3

Term. Date
N/A

Due Date
N/A

LDTU
N/A

Weeks PG
N/A

Next Appt.
N/A

Approval Date
N/A

NEW HIRE, PRECERT M
NEW HIRE, PRECERT CHILD C

Anthropometric Data

Add Anthro Add Pending Lab Code

Date	Current Weight	Pre-Preg Wt	Ht	Weeks Gestation	Total Wt Gain	Wt Change	Avg. Wt G/L/Wk	Wt at Delivery	BMI	Pending Lab Code	Multi-Fetal Flag
06/16/2016	64 kg 920 gm	65 kg 317 gm	165 cm 7 mm	8	-397 gm	-50 gm			23.8		<input checked="" type="checkbox"/>

Row count: 10 Showing 1 of 1

Blood Work Data

Add Blood Work Add Pending Lab Code

Date	HGB	HCT	Pending Lab Code	Weeks Gestation
No data to show				

Row count: 10

ARIZONA LTR (WARRANT STUB)

Monthly Income Breakdown

Member	Monthly Income	Provider Details
NEW HIRE, PRECERT M	\$2,000.00	Details
NEW HIRE, PRECERT CHILD C	\$2,000.00	Details
NEW HIRE, PRECERT CHILD 2	\$750.00	Details

Migrant

Save Reset

METRIC (SLIDE LAYER)

JOSEPH H | Home | Sys Admin | Ops Mgmt | WIC Services | CSFP Services | **Schedule** | Farmers' Market | Finance | Vendor | Program Integrity | Reports | Help

Family | Client | **Enrollment**

Use the Process You Learned Previously

English Metric

LA/Clinic
N/A

Family ID
160011746

Auth. Rep. Name
NEW HIRE, PRECERT

Phone
(928) 555-5555

Client ID
21021410612

Client Name
NEW HIRE, PRECERT CHILD 2

Date of Birth
4/5/2013

Age
3 years, 6 months

Cert. Period
N/A

Category
C3

Term. Date
N/A

Due Date
N/A

LDTU
N/A

Weeks PG
N/A

Next Appt.
N/A

Approval Date
N/A

NEW HIRE, PRECERT M
NEW HIRE, PRECERT CHILD C

Anthropometric Data

Add Anthro Add Pending Lab Code

Date	Current Weight	Pre-Preg Wt	Ht	Weeks Gestation	Total Wt Gain	Wt Change	Avg. Wt G/L/Wk	Wt at Delivery	BMI	Pending Lab Code	Multi-Fetal Flag
06/16/2016	143 lb 2 oz	144 lb	65 2/8 in	8	-14 oz	-2 oz			23.79		<input checked="" type="checkbox"/>

Row count: 10 Showing 1 of 1

Blood Work Data

Add Blood Work Add Pending Lab Code

Date	HGB	HCT	Pending Lab Code	Weeks Gestation
No data to show				

Row count: 10

Monthly Income Breakdown

Member	Monthly Income	Provider Details
NEW HIRE, PRECERT M	\$2,000.00	Details
NEW HIRE, PRECERT CHILD C	\$2,000.00	Details
NEW HIRE, PRECERT CHILD 2	\$750.00	Details

Migrant

Save Reset

5.8 INCOME - ADJUNCT ELIGIBILITY

The screenshot displays the 'Income Eligibility' section of the WIC Services application. The 'Household' information includes the Income Date (10/25/2016) and Family Size (5). The 'Adjunct Eligibility' table is highlighted with a red border and contains the following data:

Numbers	ARCCCL	FORM	SECTION A	SNAP (FOOD STAMPS)	TANF
NEW HIRE, PRECER M	JURY PROOF	REFERRED	REFERRED	JURY NO PROOF	REFERRED
NEW HIRE, PRECER CHILD 1	JURY PROOF	REFERRED	REFERRED	JURY NO PROOF	REFERRED
NEW HIRE, PRECER CHILD 2	JURY PROOF	REFERRED	REFERRED	JURY NO PROOF	REFERRED

Below the table, the 'Income' section shows a table for 'Providers' with columns for 'Income Provider', 'Amount', 'Interval', 'Hours Per Week', 'Documentation', and 'Monthly'. The 'Monthly Income Breakdown' section is also visible.

The 'Adjunct Eligibility Grid' section is titled 'Record Information about State and Federal Programs' and includes a list of programs: Participation, Proof, and Referrals.

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, according to your Agency's policies and procedures.

You'll document whether the clients brought proof of participation in the program or not. You may also document program referrals.

5.9 INCOME - INCOME PROVIDERS

The screenshot shows a software interface for managing income providers. The top navigation bar includes tabs like 'Family', 'Client', and 'Income'. The main content area is divided into sections: 'Other Important Information' with a 'Checkbox at the Bottom of the Screen' and 'When Finished, Select Save' instructions, and an 'Income Providers' table. The table has columns for 'Income Provider', 'Amount', 'Interval', 'Hours Per Week', 'Documentation', and 'Monthly'. It lists three providers: 'PRIMARY PROVIDER' (\$2,000.00 M - MONTHLY), 'STATE OF ARIZONA' (\$750.00 M - MONTHLY), and '17 FOSTER CARE PLACEMENT LTR. (WARRANT STUB)' (\$750.00). Below the table is a 'Monthly Income Breakdown' section with a table showing monthly income for 'NEW HIRE, PRECERT M', 'NEW HIRE, PRECERT CHILD C', and 'NEW HIRE, PRECERT CHILD 2'. At the bottom, there is a 'Migrant' checkbox and 'Save' and 'Reset' buttons.

Notes:

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

Select the Add button on the Income Providers Grid, and follow the process you learned earlier in the course to add information about each person who provides income in the household.

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.

Other information, like migrant status, is important when determining income eligibility.

Use the checkbox 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.

5.10 INCOME - MONTHLY INCOME BREAKDOWN

The screenshot shows the 'Income' tab in the WIC Services software. The interface includes fields for Authorized Representative 1 and 2, with sub-labels 'NEW HIRE' and 'PRECERT'. Fields include Last Name, First Name, MI, and Proof of Identity. Address fields include Street 1, Street 2, and City, State, ZIP Code, and County. Phone number fields include Phone Number, Ext., Phone Type, Do Not Call, Do Not Text, and Priority. A blue callout box with a hand icon says 'Click on the Together We Can icon on screen to learn more.' At the bottom, there are buttons for 'After Precertification', 'Create Appointments', and 'Continue with Certification'.

Notes:

Income Eligibility screen displays information for the entire family; however, eligibility 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.

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

After the Precertification screens are completed, you can use the client file to create appointments or continue with the certification process in WIC Services.

TOGETHER WE CAN (SLIDE LAYER)

JOSEPH H | 02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS HEALTH

Home Sys Admin Ops Mgmt WIC Services CSFP Services Scheduling Farmers' Market Finance Vendor Program Integrity Reports Help

Family Client Income Cert Med Assess Care Plan Ed Pkg Appts Notes

Search

LA/Clinic
DOUGLAS HEALTH
Family ID
160011746
Auth. Rep. Name
NEW HIRE, PRECERT
Phone
(928) 555-5555

NEW HIRE, PRECERT
CHILD 2
NEW HIRE, PRECERT
CHILD 0
NEW HIRE, PRECERT M

Authorized Representative 1

*Last Name *First Name MI
NEW HIRE PRECERT M
*Proof Of Identity

Authorized Representative 2

Last Name First Name MI
NEW HIRE PRECERT 2 B
Proof Of Identity

Make sure you understand your Agency's policies and procedures regarding eligibility verification and documentation for the precertification process.

Close

Street Address Do Not Send Mailings To Mailing

*Street 1 *Street
1234 MAIN STREET

Street 2

*City, State, ZIP Code, and County
DOUGLAS, AZ 85607 COCHISE

Family Phone(s) Does not have a phone Add

Phone Number Ext. Phone Type Do Not Call Do Not Text Priority

Appointment Reminder Email

After Precertification
Create Appointments
Continue with Certification


Languages
*Primary Language
SPANISH
Secondary Language
Interpreter Required

5.11 SELF-CHECK - THE PURPOSE OF PRECERTIFICATION

Instructions: Choose all the correct answer(s), and select 'SUBMIT' to check your answer(s).

Why would you use the Precertification screens? Select all that apply.

- ☒ To determine if a client meets basic eligibility requirements
- ☐ To document assessment information
- ☒ To create records in order to schedule appointments
- ☐ To issue food benefits



5.12 SELF-CHECK - PRECERTIFICATION SCREENS


Instructions: Select the best answer, and then click 'SUBMIT' to check your answer.

Which screen is optional in the Precertification process?

☐ Family Information

☐ Client Registration

☐ Income Eligibility



Members	ANCCS	FONE	SECTION 8	SNAP (FOOD STAMPS)	TANF
NEW HIRE PRECERT M					
NEW HIRE PRECERT CHILD C					

5.13 SUMMARY



Notes:

Congratulations! You've completed Module 8 of the HANDS New Hire course.

In this module, you learned how to pre-certify clients.

You learned how to enter family and client information using the Family Information and Client Registration screens.

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

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 client transfers. We'll look at how to transfer clients from both in and out of state.

MODULE 9 - TRANSFERS

6.1 TRANSFERS

The screenshot shows the 'Out of State Transfer' form in the Hands Health system. The form is titled 'Out of State Transfer' and includes fields for 'Family Size', 'Clinic' (dropdown menu), 'Authorized Representative 1' (Last Name, First Name, MI), and 'Authorized Representative 2' (Last Name, First Name, MI). Below these fields is a section titled 'Transferring Families and Clients' with three tabs: 'Families and Clients Who Participate In-State', 'Families and Clients Who Participate Out of State', and 'Families and Clients Who Participate Out of State'. The 'Families and Clients Who Participate Out of State' tab is selected. Below the tabs are fields for 'Street 1', 'Street 2', 'City, State, ZIP Code, and County', and 'Family Phone(s)'. There is a button 'Does not have a phone' and an 'Add' button. At the bottom, there is a table for 'Phone Number' with columns for 'Ext.', 'Phone Type', 'Do Not Call', 'Do Not Text', and 'Priority'. The table is currently empty with the text 'No data to show'. At the very bottom, there is an 'Appointment Reminder Preference' section with buttons for 'Print Proxy Form', 'Save', 'Reset', and 'Cancel'.

Notes:

You've learned about some of the screens that help provide services to clients. Now it's time to learn about a few more.

Sometimes clients are participating in WIC Programs in other Agencies. These Agencies may be in the same state, or in other states. A client is automatically eligible for the WIC Program in your agency if he or she is in an active WIC certification in another Agency. There is no need to go through the certification process again.

In this module, you'll learn about transferring WIC families and clients who participate in your State Agency.

You'll also learn about creating records for families and clients who participate in other State WIC programs, also called the Out of State Transfer process.

6.2 IN-STATE TRANSFER

The screenshot shows a software interface for in-state transfer. A 'Transfer Client' dialog box is open, asking 'Do you want to transfer this client 1021410304 to a new family or an existing family?'. The dialog has three buttons: 'New Family', 'Existing Family', and 'Cancel'. The background shows a 'Client Information' screen for a child named 'TRANSFER, CHILD' with fields for Last Name, First Name, MI, Date of Birth, Age, Gender, Mother's ID, and Application Date. Below the dialog, there are sections for 'New Family', 'Existing Family', and 'Individual Clients Only'.

Notes:

In-State Transfers can be completed in two places, The Client Family Search and the Client Information screens.

Use the Client Family Search screen to transfer an entire family or an individual client. The Client Information screen is used solely to transfer individual clients. Clients can be transferred into a new or an existing family.

Let's take a look at these processes.

6.3 CLIENT FAMILY SEARCH - TRANSFER A FAMILY

The screenshot shows the 'Client Family Search - Transfer a Family' screen in the HANDS system. The interface includes a top navigation bar with tabs like 'Family', 'Client', 'Income', 'Care', 'Med', 'Assess', 'Care Plan', 'Ed Plan', 'Apps', and 'Notes'. The main form area is divided into several sections:

- Authorized Representative 1:** Fields for Last Name, First Name, MI, Proof of Identity, Education, Register To Vote?, and Disability.
- Authorized Representative 2:** Similar fields for a second representative.
- Family Information:** Fields for Family ID, Auth. Rep. Name, and Phone.
- Proof of Address:** Fields for Street Address and Mailing Address.
- Contact Information:** Fields for Phone Number, Phone Type, Do Not Call, Do Not Text, and Priority.
- Appointment Reminder Preference:** Radio buttons for Phone, Email, and Text.
- Languages:** Fields for Primary and Secondary Language, with an 'Interpreter Required' checkbox.

A large black banner in the center of the form reads 'Complete the Process According to Policy and Procedure'. At the bottom, there are buttons for 'Print Proxy Form', 'Signatures', 'New Client', 'Save', and 'Reset'.

Notes:

As we just learned, the Client Family Search screen can be used to transfer an entire family.

Select the State radio button to search all of the Agencies within your State Program. Search for the family you wish to transfer using the process we learned about in previous modules. Select the checkbox next to any of the clients in the family you would like to transfer. Then, select the Trans Family button.

Select No in the verification window to cancel the transfer and return to the main screen. Select Yes to continue with the transfer. Another window will display confirming the transfer. Select the OK button.

HANDS will take you to the Family Information screen. Continue with the process according to your Agency's policies and procedures.

6.4 CLIENT FAMILY SEARCH - TRANSFER A CLIENT



The screenshot shows a software interface for transferring a client. At the top, there's a navigation bar with various tabs like 'Family', 'Client', 'Income', etc. The main area is divided into sections for 'Family Information', 'Authorized Representative 1', 'Authorized Representative 2', and 'Transfer Options'. The 'Transfer Options' section has buttons for 'TRANSFER, DARY', 'TRANSFER, CHILD', and 'TRANSFER, MOM'. Below this, a large black box with white text states: 'The transfer is complete! Continue According to Policies and Procedures. Select Transfer Client in Window. Follow Your Agency's Policies and Procedures.'

Notes:

The process for transferring a client using Client Family Search starts the same way as transferring a family.

First, select the State radio button to search all of the Agencies within your State Program. Search for the client you wish to transfer using the process we learned about in previous modules. Select the checkbox next to the client you would like to transfer. Then, select the Trans Client button.

After the Trans Client button is selected, you'll need to select whether to create a new family for the client, or to add the client to an existing family.

Select New Family to create a new family record for the client. This will take you to a blank Family Information screen. Complete the Family Information screen to finish the transfer process. Make sure you follow your Agency's policies and procedures.

Select Existing Family to search for an existing family. Search by Family ID, Authorized Rep. Last Name, and/or Authorized Rep. First Name. Select the checkbox next to the family record you wish to transfer the client into. Select the Transfer Client button at the bottom of the screen.

Select Transfer Client button again in the verification window to continue with the transfer and then select OK in the confirmation window. The transfer is complete!

Continue with the process according to your Agency's policies and procedures.

6.5 IN-STATE TRANSFER - CLIENT INFORMATION

The screenshot displays a software interface for client management. A modal dialog titled "Transfer Client" is centered on the screen, asking the user: "Do you want to transfer this client 1021410304 to a new family or an existing family?". The dialog has three buttons: "New Family", "Existing Family", and "Cancel". In the background, the "Client Information" screen is visible. It contains fields for "Last Name" (TRANSFER), "First Name" (CHILD), "MI", "Date of Birth" (02/03/2014), "Age" (2 yrs, 7 mos), "Gender" (M), "Mother's ID" (1021410305 - TRANSFER, FAMILY), and "Application Date" (06/06/2014). A "Transfer Client" button is highlighted in the bottom right corner of the background screen, with a white arrow pointing to it from below.

Notes:


You can also transfer a client using the Client Information screen. While you're in the client's record, select the Transfer Client button. Then follow your newly-learned process to add the client to either a new, or an existing, family.

6.6 SELF-CHECK - IN-STATE TRANSFER

Instructions: Choose all the correct answer(s), and select 'SUBMIT' to check your answer(s).

Where can you complete the In-State Transfer process? Select all that apply.

- ☒ Client Family Search screen
- ☐ Care Plan screen
- ☒ Client Information screen
- ☐ In the Food Package Issuance screen



The screenshot shows the HANDS system interface. At the top, there is a navigation bar with links: Home, Sys Admin, Ops Mgmt, **WIC Services**, CDFP Services, Scheduling, Farmers Market, Finance, Vendor, Program Integrity, Reports, and Help. Below the navigation bar is a search form with the following fields: Client ID, Family ID, Last Name, First Name, MI, Gender, Client Category, Date of Birth, Cert. Start Date, Cert. End Date, Auth. Rep. 1 Last Name, Auth. Rep. 1 First Name, and Phone Number. There are also filters for CLINIC, AGENCY, STATE, and ACTIVE. The form is titled 'Where can you complete the In-State Transfer process? Select all that apply.'

6.7 OUT OF STATE TRANSFER

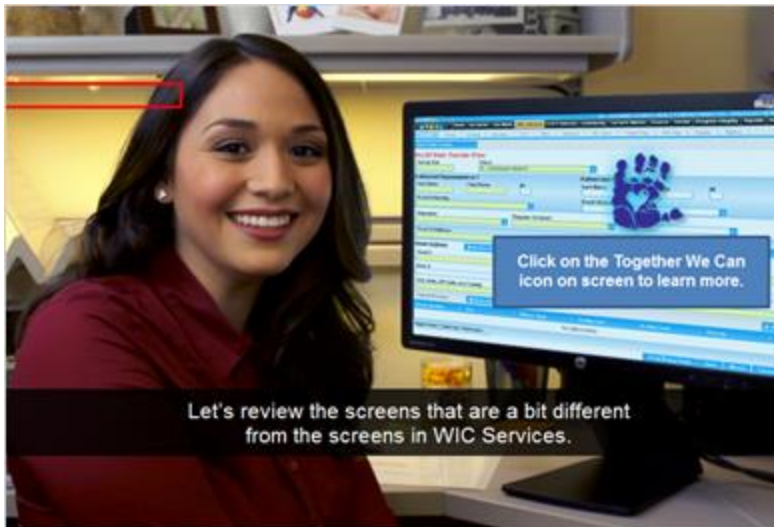
Handwritten note: 6.7 OUT OF STATE TRANSFER

Notes:

Clients that are participating in the WIC Program in other states are eligible to participate in our WIC Program without going through the entire certification process again.

The Out of State Transfer screens are accessible from the Client Family Search screen. The screens are very similar to the other HANDS eligibility screens, with a few fields that are different. Let's get started!

6.8 OUT OF STATE TRANSFER - CLIENT FAMILY SEARCH



Notes:

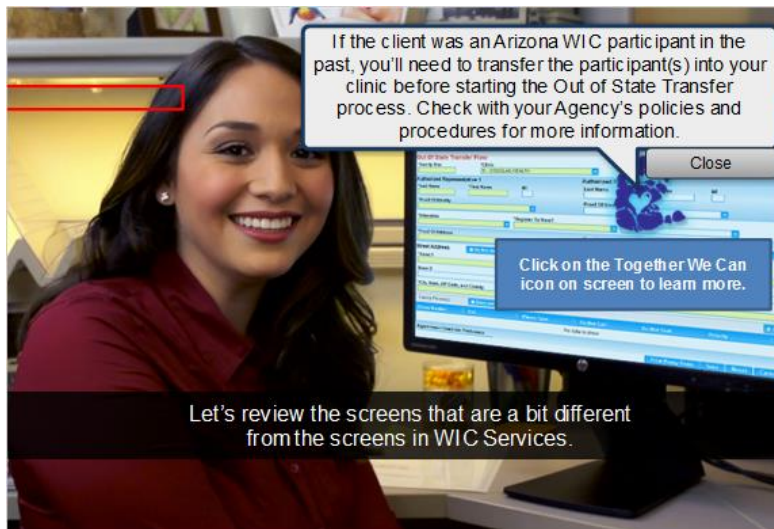
Start on the Client Family Search screen. Like starting a certification, start by searching for the client to see if his or her record is already in HANDS.

Select the Out of State Trans button to begin the process.

All of the screens involved in Out of State Transfer will display a red message letting you know that you are in the Out of State Transfer Flow instead of the regular Certification Flow.

The screens are either very similar to, or the same as the screens in the Certification Flow Menu in WIC Services. However, not all of the screens are required in the Out of State Transfer process. Let's review the screens that are a bit different from the screens in WIC Services.

TOGETHER WE CAN (SLIDE LAYER)



6.9 OUT OF STATE TRANSFER - FAMILY INFORMATION

The screenshot shows a web-based form titled "From Where Family Was Referred". At the top, there are two dropdown menus: "Program" (selected: AHOCOS) and "Organization" (selected: COCHISE COUNTY HEALTH & SOCIAL SERVICES). Below these are several input fields: "Family Phone(s)", "Family Size", "Appointment Reminder Preference", "Languages", "Proxy 1" (with sub-fields for Last Name, First Name, MI, and Proof of Identity), "Proxy 2" (with sub-fields for Last Name, First Name, MI, and Proof of Identity), and "How did you hear about WIC?". The form is part of a larger system with a navigation bar at the top and a footer at the bottom.

Notes:

The Family Information screen in the Out of State transfer process has a lot of the same fields as the Family Information screen in WIC Services. The screen also has a Family size field.

Like the Family Information screen in WIC Services and Precertification, this screen is used to enter basic information about your client's family. First, document Family Size and select a clinic in which to enroll the family.

Then document information about the family's Authorized Representatives, contact information, and confidentiality.

Other items that need to be added include the family's languages, whether they need an Interpreter, and an appointment reminder preference. Proxy information is documented here as well.

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.

6.10 OUT OF STATE TRANSFER - CLIENT REGISTRATION AND ACTIVE RECORD

Client Information

Family ID: 160011748

Auth. Rep. Name: 160011748

Client Name: 160011748

Date of Birth: 6/17/1997

Age: 19 yrs, 4 mos

Cert. Period: 8/1/2016 - 5/22/2017

Term. Date: N/A

LDIU: N/A

Next Appl.: N/A

Wait Listed On: N/A

Client Information

Client ID: H12345678

Client Name: 160011748

Date of Birth: 6/17/1997

Age: 19 yrs, 4 mos

Cert. Period: 8/1/2016 - 5/22/2017

Term. Date: N/A

LDIU: N/A

Next Appl.: N/A

Wait Listed On: N/A

Family Information

Last Name: MAPLE

First Name: TREE

MI: M

Date of Birth: 06/17/1997

Age: 19 yrs, 4 mos

Gender: M

Mother's ID: Or Mother outside of Family

Proof Of Identity: C - DRIVER'S LICENSE/GOVERN

VOC: H12345678

Application Date: 10/25/2016

Disability:

Has the child entered into foster care, or changed foster care homes, within the last 6 months?

Yes No

Race

Choose one of the following:

American Indian or Alaskan Native

Asian

Native Hawaiian or Other Pacific Islander

Black or African American

White

Ineligibility Reason: N/A

Reasons Code: N/A

Created Date: No data to show

Certification Start Date: No data to show

Scanned Documents

Scan Document Signatures Print VOC Form Transfer Client Add Save Reset

Notes:

After adding your new family on the Family Information screen, add clients to the family using the New Client button.

Like the screen in WIC Services, the Client Registration screen in Out of State Transfer is where basic information about your client is documented.

The screen looks a bit different here than it does in WIC Services. It has a field for the Verification of Certification, or VOC, number.

Complete the fields as you would complete them in WIC Services, and then select Save.

A window will display asking if you would like to add more clients to the family or if you would like to continue on to the Cert. Action screen.

Select Cancel to stay on the Client Information screen and add more clients to the family.
Select the Yes button to go to the Cert. Action screen.

After the Client Registration screen is completed, the Out of State Transfer icon will display in Active Record. Hover on the Active Record icon to see the VOC field information.

TOGETHER WE CAN (SLIDE LAYER)

JOSEPH H | 02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS HEALTH

Home Sys Admin Ops Mgmt WIC Services CSFP Services Scheduling Farmers' Market Finance Vendor Program Integrity Reports Help

Family Client Income Cert Med Assess Care Plan Ed Pkg Appts Notes

Client Information
LA/Clinic
DOUGLAS HEALTH
Family ID
160011749
Auth. Rep. Name
MAPLE, TREE
VOC Information
H12345678

Client ID
10214108
Client No
MAPLE, TREE M
Date of Birth
6/17/1997
Age
19 yrs, 4 mos
Cert. Period
8/1/2016 - 5/22/2017
Term. Date
N/A
Due Date
4/10/2017
LDTU
N/A
Weeks PG
16
Next Appt.
N/A
Appr Thru
N/A
Wait Listed On
N/A

*Last Name
MAPLE
*First Name
TREE
MI
M
Date of Birth
06/17/1997
Age
19 yrs, 4 mos
*Gender
M F

Proof Of Identity
5- DRIVER'S LICENSE/GOVERN

Has the child entered into
Care
Yes No

Close

Make sure you have the VOC or Participant Profile Report information before you process an Out of State Transfer.

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

*Choose one of the following:
American Indian or Alaskan Native
Asian
Native Hawaiian or Other Pacific Islander
Black or African American
White

*Choose one or more of the following:
American Indian or Alaskan Native
Asian
Native Hawaiian or Other Pacific Islander
Black or African American
White

State Name
N/A

Ineligibility Reason
N/A

Not Linked Reasons

Reason Code	Created Date	Certification Start Date
No data to show		

Scanned Documents

Scan Document Signatures Print VOC Form Transfer Client Add Save Reset

6.11 OUT OF STATE TRANSFER - CERTIFICATION ACTION

Certification Action

LA/Clinic: DOUGLAS HEALTH

Family ID: 160011621

Auth. Rep. Name: MAPLE, TREE

Phone: (415) 123-3456

Client ID: 1021410395

Client Name: MAPLE, TREE M

Date of Birth: 6/11/1997

Age: 19 yrs, 3 mos

Cert. Period: 5/10/2016 - 2/11/2017

Category: PG2

Term. Date: N/A

Due Date: 12/31/2016

LDTU: N/A

Weeks PG: 27

*Category: PG2 (PREGNANT ADULT (16 AND OVER))

Reason Client Not Present: [Dropdown]

Last Menstrual Period: 03/26/2016

Expected Delivery Date: 12/31/2016

Actual Delivery Date: [Empty]

Cert Start Date: 5/10/2016

Cert End Date: 2/11/2017

Duration (Weeks): 39

Cert Created By: HUOSEPH11

Termination Date: N/A

Disqualification Start Date: N/A

Disqualification End Date: N/A

Disqualification Reason: N/A

Category	Cert Start Date	Cert End Date	Duration	Week List	Client Present	Term. Date	Term. Reason	Cert Created By
PG2 - PREGNANT ADULT (16 AND OVER)	5/10/2016	2/11/2017	39	N	Y			HUOSEPH11

Not Linked Reasons

Reason Code	Created Date	Certification Start Date
No data to show		

The full Cert Action screen will display after the information is saved.

Category Change | Terminate Cert | Eligibility | Reinsert Cert | New Cert | Save | Reset

Notes:

The Cert Action screen only requires information in a few fields. Most of the fields are the same as the fields in WIC services, with two exceptions. These are the Start Date and the Priority Level.

Document the client's Start Date and Priority Level using information on the client's VOC form. Complete the other fields as you normally would.

Select the Save button. The full Cert Action screen will display after the information is saved.

TOGETHER WE CAN (SLIDE LAYER)

JOSEPH1 | Home | Sys Admin | Ops Mgmt | **WIC Services** | CSFP Services | Scheduling | Farmers' Market | Finance | Vendor | Program Integrity | Reports | Help

Family | Client | Income | **Cert** | Med | Assess | Care Plan | Ed Pkg | Appts | Notes

Certification Action

LAIClinic
DOUGLAS HEALTH

Family ID
160011621

Auth. Rep. Name
MAPLE, TREE

Phone
(415) 123-3456

Client ID
1021410395

Client Name
MAPLE, TREE M

Date of Birth
6/17/1997

Age
19 yrs, 3 mos

Cert. Period
5/10/2016 - 2/11/2017

Term. Date
N/A

LDTU
N/A

Next Appt
N/A

Wait Listed On
N/A

*Category
PG2 (PREGNANT ADULT (18 AND OVER))

Reason Client Not Present

Last Menstrual Period
03/26/2016

Expected Delivery Date
12/31/2016

Actual Delivery Date

Cert Start Date
5/10/2016

Cert End Date
2/11/2017

Duration (Weeks)
39

Make sure you understand your Agency's policies and procedures regarding eligibility verification and documentation for the precertification process.

Certifications

Category	Cert Start Date	Cert End Date	Duration	Wait List	Precert	Term. Date	Term. Reason	Cert Created By
PG2 - PREGNANT ADULT (18 AND OVER)	5/10/2016	2/11/2017	39	N	Y			HJOSEPH1

Not Linked Reasons

Reason Code	Created Date	Certification Start Date
No data to show		

The full Cert Action screen will display after the information is saved.

Category Change | Terminate Cert | Disqualify | Reinstate Cert | New Cert | Save | Reset

6.12 OUT OF STATE TRANSFER - OTHER SCREENS

Certification Action

LA/Clinic: DOUGLAS HEALTH

Family ID: 160011621

Auth. Rep. Name: MAPLE, TREE

Phone: (415) 123-3456

Client ID: 1021410395

Client Name: MAPLE, TREE M

Date of Birth: 6/17/1997

Age: 19 yrs, 3 mos

Cert. Period: 5/10/2016 - 2/11/2017

Category: PG2

Term. Date: Due Date

Weeks PG: 39

Next Appc. Appc Thru

Wait Linked On

***Category:** PG2 (PREGNANT ADULT (18 AND OVER))

Reason Client Not Present:

Last Menstrual Period: 03/26/2016

Expected Delivery Date: 12/31/2016

Actual Delivery Date:

Cert Start Date: 5/10/2016

Cert End Date: 2/11/2017

Duration (Weeks): 39

Cert Created By: HUOSEPH1

Disqualification Start Date: N/A

Disqualification End Date: N/A

Disqualification Reason: N/A

Certifications:

Category	Cert Start Date	Cert End Date	Duration	Week List	Client Present	Term. Date	Term. Reason	Cert Created By
PG2 - PREGNANT ADULT (18 AND OVER)	5/10/2016	2/11/2017	39	N	Y			HUOSEPH1

Not Linked Reasons

Remaining Screens the Same as WIC Services

Not All Screens Are Required

Follow Your Agency's Policies and Procedures

Buttons: Category Change, Terminate Cert, Disqualify, Reinstate Cert, New Cert, Save, Reset

Notes:

The remaining screens in the Out of State Transfer Flow are exactly the same as the screens in WIC Services.

Not all of the screens are required, and each Agency may complete the process a bit differently. Follow your Agency's policies and procedures to complete the Out of State Transfer process.

TOGETHER WE CAN (SLIDE LAYER)

Certification Action

LA/Clinic: DOUGLAS HEALTH

Family ID: 160011621

Auth. Rep. Name: MAPLE, TREE

Phone: (415) 123-3456

Client ID: 1021410395

Client Name: MAPLE, TREE M

Date of Birth: 6/17/1997

Age: 19 yrs, 3 mos

Cert. Period: 5/10/2016 - 2/11/2017

Category: PG2

Term. Date: Due Date

Weeks PG: 39

Next Appc. Appc Thru

Wait Linked On

***Category:** PG2 (PREGNANT ADULT (18 AND OVER))

Reason Client Not Present:

Last Menstrual Period: 03/26/2016

Expected Delivery Date: 12/31/2016

Actual Delivery Date:

Cert Start Date: 5/10/2016

Cert End Date: 2/11/2017

Duration (Weeks): 39

Cert Created By: HUOSEPH1

Disqualification Start Date: N/A

Disqualification End Date: N/A

Disqualification Reason: N/A

Certifications:

Category	Cert Start Date	Cert End Date	Duration	Week List	Client Present	Term. Date	Term. Reason	Cert Created By
PG2 - PREGNANT ADULT (18 AND OVER)	5/10/2016	2/11/2017	39	N	Y			HUOSEPH1

Not Linked Reasons

Make sure you understand your Agency's policies and procedures regarding eligibility verification and documentation for the precertification process.

Remaining Screens the Same as WIC Services

Not All Screens Are Required

Follow Your Agency's Policies and Procedures

Buttons: Category Change, Terminate Cert, Disqualify, Reinstate Cert, New Cert, Save, Reset

6.13 SELF-CHECK - OUT OF STATE TRANSFERS


Instructions: Select the best answer, and then click 'SUBMIT' to check your answer.

Where would you find the information needed to complete the client's certification and priority information on the Cert Action screen?

☐ The WIC Folder

☐ The Verification of Certification (VOC) form

☐ The Authorized Rep.



6.14 OUT OF STATE TRANSFER - SCANNING

The screenshot shows the 'Out of State Transfer - Scanning' interface in the LAClinic system. The form is divided into several sections:

- Header:** LAClinic DOUGLAS HEALTH, Home, Sys Admin, Ops Mgmt, **VOC Services**, CFP Services, Scheduling, Farmers Market, Finance, Vendor, Program Integrity, Reports, Help.
- Left Sidebar:** Family ID (16011614), Auth. Rep. Name (TRANSFER, FAMILY), Phone (N/A), Client ID (1021410384), Client Name (TRANSFER, CHILD), Date of Birth (10/15/2016), Age (6), LDTU (N/A), Next Appt. (N/A), Wait Listed On (N/A).
- Main Form:**
 - Mother's ID: 1021410381 - TRANSFER, MOM
 - VOC: ID98765432
 - Application Date: 05/29/2016
 - Disability: [Dropdown]
 - Ethnicity and Race: *Choose one of the following: ☒ Hispanic or Latino, ☐ Not Hispanic or Latino. *Choose one or more of the following: ☒ American Indian or Alaskan Native.
 - Has the child entered into foster care, or changed foster care homes, within the last 6 months? ☐ Yes, ☐ No.
- Information Displays in the Scanned Documents Grid:**
 - Select Edit to View or Print
 - Information Display: N/A
 - Not Linked Reasons: [Table with 3 columns: Reason Code, Created Date, Certification Start Date. No data to show.]
- Scanned Documents Grid:**

Scan Title	Description	Scanned Date	Scanned By
DAHO VOC		10/15/2016	SSCHWEIT

Notes:

The scanning functionality is available on the Client Information screen in the Out of State Transfer process. You'll need to scan in the client's VOC when you are adding him or her to the system.

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, 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.

6.15 TRANSFERS - SIGNATURE

Notes:

Signature functionality is available on the Medical screen in both the In-State, and Out of State Transfer processes.

Use the signature pad to document the Authorized Representative's understanding of his or her Rights and Obligations.

Select the Signatures button to start the process, just like during a certification.

The Signature Type field will default to Consent, and the Client ID field will be blank.

Select Rights and Obligations and if applicable, the individual client for whom you're collecting the signature. 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.

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

6.16 SUMMARY



Notes:

Great Job! You've completed Module 9 of the HANDS New Hire course.

You learned about transferring individual clients and entire families.

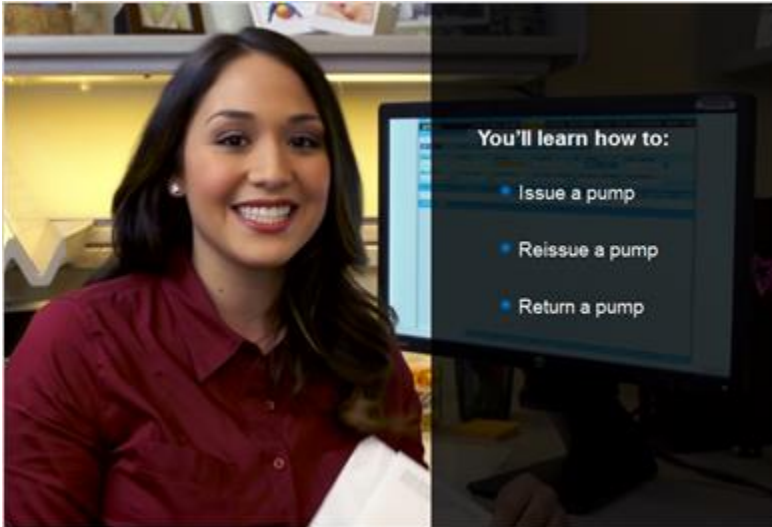
You learned how to transfer WIC families and clients who participate in your State Agency. You know how to create records for families and clients who participate in other State WIC programs.

You also understand that all Agencies are a bit different and that it's important to know your Agency's specific policies and procedures.

In the next module, we'll learn about using HANDS to issue breast pumps.

MODULE 10 - BREAST PUMP ISSUANCE AND RETURN

7.1 BREAST PUMP ISSUANCE AND RETURN



Notes:

You've learned the basics of HANDS. You know how to document information needed to certify clients, including eligibility, medical data, the results of your ABCDE assessment, nutrition discussion contacts, and Notes.

The HANDS system also assists in providing breast pumps, one of the most valuable services offered by the WIC Program. The WIC Program offers hospital-grade breast pumps to women to support breastfeeding goals.

In this module you'll learn how to issue a breast pump using HANDS, the steps to take when reissuing a pump, and how to return a pump.

7.2 BREAST PUMPS - BEFORE ISSUING A BREAST PUMP



Notes:

Each staff member must finish required training before issuing breast pumps. After the training is completed the staff member will be given the authority and role to issue breast pumps in HANDS.

If you have any questions about the training needed, check with your trainer or supervisor.

So, what needs to be done before issuing a pump in HANDS? First, make sure the client is in an active certification. Then, make sure the client's category is eligible for a breast pump. HANDS will only issue pumps to non-pregnant women with active certifications.

Your Agency may have additional policies and procedures for issuing breast pumps. Ask your trainer or supervisor if you have any questions.

Next, complete and document a breastfeeding assessment. This will help you understand the needs of mom and baby. The assessment will also determine whether a breast pump is necessary and will support the client's breastfeeding goals.

If the assessment determines that the client needs a breast pump, retrieve a clean, working pump from storage. Make sure the serial number of the pump is easily accessible for reference. Now you are ready to issue a pump in HANDS!

7.3 BREAST PUMPS - NAVIGATION

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

Serial Number	Client ID	Pump Type	Client Pump Status	Inventory	Issue Date	Issued By	Due Date	Released Due Date
1021410229	1021410229	HOSPITAL GRADE HYGELA ENCEARE	ISSUED	ISSUED	09/07/2016	CHAMBERLAIN, JACLYN	12/07/2016	09/09/2016
1021410229	1021410229	Hospital Grade Amada Elite	RETURNED	ISSUED	09/07/2016	CHAMBERLAIN, JACLYN	12/07/2016	
1021410229	1021410229	HOSPITAL GRADE HYGELA ENCEARE	RETURNED	RETURNED	09/06/2016	CHAMBERLAIN, JACLYN	12/06/2016	

Navigation Menu in Active Record

Scroll or Type to Find Screen

Select Screen

Client Information Automatically Displays

Notes:

To issue a pump in HANDS, navigate to the Breast Pump Issuance and Return. The screen does not have its own tab on the Certification Flow Menu; however, there are a couple of ways to get there.

One way is using the Navigation Menu on the Client Family Search screen. The screen will be blank.

You can also get to the Breast Pump Issuance and Return screen using Active Record. After a client has been selected, select the Navigation Menu in Active Record. Search for the Breast Pump Issuance and Return screen by scrolling, or typing in the search field.

Display the screen by selecting its name from the menu. Notice that the client's information is automatically filled in when the screen is accessed through Active Record.

TOGETHER WE CAN (SLIDE LAYER)

It may be easier to use the Navigation Menu on the Client Family Search screen when returning a pump or changing the Pump Status to Available. More on this later.

Close

Navigation Menu in Active Record

Scroll or Type to Find Screen

Select Screen

Client Information Automatically Displays

Serial Number	Client ID	Last Name	First Name	MI	Inventory Status	Issue Date	Issued By	Due Date	Reissued Due Date
121231234	1021410229	CHAMBERLAIN	JACLYN		ISSUED	09/07/2016	CHAMBERLAIN, JACLYN	12/07/2016	09/09/2016
121231234	1021410229	CHAMBERLAIN	JACLYN		ISSUED	09/07/2016	CHAMBERLAIN, JACLYN	12/07/2016	09/09/2016
121231234	1021410229	CHAMBERLAIN	JACLYN		RETURNED	09/06/2016	CHAMBERLAIN, JACLYN	12/06/2016	09/06/2016

LA/Clinic DOUGLAS HEALTH
Family ID 160011537
Auth. Ref. PUMPING
Phone N/A
Client ID 1021410229
Client Name PUMPING, MOMMA
Date of Birth 5/8/1990
Age 26 yrs, 4 mos
Cert. Period 9/6/2016 - 8/30/2017
Category EN
Term. Date N/A
Due Date N/A
LDTU N/A
Weeks PG N/A
Next Appt. N/A
Appr Thru N/A
Wait Listed On N/A

Scan Document Change Status Issue Search New Search Save

TOGETHER WE CAN - COPY (SLIDE LAYER)

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

Close

Navigation Menu in Active Record

Scroll or Type to Find Screen

Select Screen

Client Information Automatically Displays

Serial Number	Client ID	Pump Type	Client Pump Status	Inventory Status	Issue Date	Issued By	Due Date	Reissued Due Date
121231234	1410229	HOSPITAL GRADE HYGEIA ENDEARE	ISSUED	ISSUED	09/07/2016	CHAMBERLAIN, JACLYN	12/07/2016	09/09/2016
121231234	1410229	Hospital Grade Amada Elite	RETURNED	ISSUED	09/07/2016	CHAMBERLAIN, JACLYN	12/07/2016	09/09/2016
121231234	1021410229	HOSPITAL GRADE HYGEIA ENDEARE	RETURNED	RETURNED	09/06/2016	CHAMBERLAIN, JACLYN	12/06/2016	09/06/2016

LA/Clinic DOUGLAS HEALTH
Family ID 160011537
Auth. Ref. PUMPING
Phone N/A
Client ID 1021410229
Client Name PUMPING, MOMMA
Date of Birth 5/8/1990
Age 26 yrs, 4 mos
Cert. Period 9/6/2016 - 8/30/2017
Category EN
Term. Date N/A
Due Date N/A
LDTU N/A
Weeks PG N/A
Next Appt. N/A
Appr Thru N/A
Wait Listed On N/A


Scan Document Change Status Issue Search New Search Save

7.4 SELF-CHECK - NAVIGATION

Instructions: Select the best answer(s), and then click 'SUBMIT' to check your answer(s).

Where can you access the Breast Pump Issuance and Return screen? Select all that apply.

- ☒ Using the Navigation Menu on the Client Family Search screen
- ☐ Breast Pump Inventory screen
- ☒ Using the Navigation Menu in Active Record
- ☐ In the Food Package Issuance screen



Serial Number	Client ID	Pump Type	Client Pump Status	Inventory Status	Issue Date	Issued By	Due Date	Returned Due Date
1021410229	1021410229	HOSPITAL GRADE HYDRA ENDEARE	ISSUED	ISSUED	09/07/2016	CHAMBERLAIN, JACLYN	12/07/2016	09/09/2016

7.5 BREAST PUMP ISSUANCE AND RETURN SCREEN FUNCTIONS

COACHE COUNTY HEALTH DEPARTMENT - DONORAL HEALTH

Breast Pump Issuance and Return

Serial Number Client ID Last Name First Name MI

Serial Number	Client ID	Pump Type	Client Pump Status	Inventory Status	Issue Date	Issued By	Due Date	Returned Due Date	Actual Return Date	Referred Date	LAClinic Issued From	LAClinic Returned To
No data to show												

Row count: 10

May Be Asked to Complete

Depending on Your Role

Check with Your Supervisor

Make Pump Available Change Status Issue Search New Search

Notes:

When the screen displays, a blue grid with pump information is shown. The information displayed in the grid is either related to a client or to a pump serial number, based on how you search.

If the screen is accessed through Active Record, any documents that have been scanned into the client's record will display in the Uploaded and Scanned documents grid on the bottom of the screen.

When looking at a client's pump history, the most recent record is listed first. Client Pump Status tells you whether a pump has been returned or is still issued and is related to a client record.

You will also find information about the pump's due dates and date it was returned. Inventory Status tells you the pump's current status in the clinic. This status may, or may not, be tied to a client record.

The information listed in the grid will help you when you follow-up with the client. There are other functions on this screen that you may be asked to complete, depending on your role. Check with your trainer or supervisor for more details.

7.6 BREAST PUMPS - ISSUE A BREAST PUMP

The screenshot shows the HANDS software interface for issuing a breast pump. The top navigation bar includes links for Home, Sys Admin, Ops Mgmt, WIC Services, C/SFP Services, Scheduling, Farmers Market, Finance, Vendor, Program Integrity, Reports, and Help. The main content area is divided into several sections:

- Client Information:** LA/Chile DOUGLAS HEATH, Family ID: 160211614, Auth. Rep. Name: TRANSFER, FAMILY, Phone: N/A.
- Pump Table:** A table with columns: Serial Number, Client ID, Pump Type, Client Pump Status, Inventory Status, Issue Date, Issued By, Due Date, Released Date, Actual Release Date, and Release Date. One row is visible: 102141038, 102141038, HOSPITAL GRADE HYDRA ENCORE, ISSUED, ISSUED, 10/17/2016, JOSEPH HEATHER, 01/17/2017.
- BP CONTRACT DUE:** 5/17/17, Scanned Date: 10/18/2016, Scanned By: BSCHWEIT.
- Print Release Form Button:** A button labeled 'Print Release Form Button' is highlighted over the 'Issue' button in the bottom right corner.

Below the screenshot, there is a text overlay that reads: "Follow your Agency's policies and procedures to review, complete, and scan the form. Hospital Grade Double Electric Pump Release Form".

Notes:

Now we are ready to issue a pump! To start the process, select the Issue button on the bottom of the screen. A new window will appear. The Serial Number pick list shows available pumps. Select the pump serial number that matches the pump you retrieved from storage.

Next, ensure the Issue Date is correct. The current date will automatically be filled in, but it can be adjusted if needed.

Select a Due Date based on your Agency's policy. Once the date is selected, select the Save button.

Once the screen is saved, the system returns to the main screen. The new pump information is added to the grid. After the pump is issued, use HANDS to print the breast pump release form. To print the form, select the pump's serial number in the grid.

This will take you back into the Issue screen. Select the Print Release Form button to print the Hospital Grade Double Electric Pump Release Form.

Ensure the release form is completed according to your Agency's policies and procedures.

7.7 SELF-CHECK - ISSUE A BREAST PUMP

(Multiple Choice, 10 points, 2 attempts permitted)

Instructions: Select the answer that does not apply and then select "SUBMIT" to check your answer.

All of the following are required steps when issuing a breast pump, EXCEPT:

- ☐ Adding the baby to the family's record
- ☐ Selecting the pump's due date
- ☐ Completing the breastfeeding assessment
- ☐ Scanning a completed release form into the client's record

LA/Clinic DOUGLAS HEALTH

Family ID 10011581

Auth. Rep. Name PUMP, FIRST

Phone N/A

Serial Number 20091229

Client Pump Status N/A

Pump Type N/A

Actual Return Date 30/09/2016

LA/Clinic Issued From DOUGLAS HEALTH

Released Due Date 30/09/2016

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7.8 BREAST PUMPS - FOLLOW-UP AND REISSUE A BREAST PUMP

The screenshot displays the 'Breast Pump Issuance and Return' screen in the HANDS software. The left sidebar shows client details for TAILORING, MOM, including her ID, birth date, age, certification period, and due date. The main area features a table of pump issuance records. One record is visible, showing a pump issued on 06/26/2016 to JOSEPH HEATHER. The 'Breast Pump - Reissued Due Date' field for this pump is highlighted with a red box and set to 11/30/2016. At the bottom, a dark banner prompts the user to 'Document Breastfeeding Assessment' and 'Complete and Scan New Release Form'.

Notes:

After a pump has been issued, an icon of a breastfeeding mother appears in the client's Active Record. Hover over the icon to see the due date for the pump. This is helpful for follow-up during future appointments.

There may be times when the mother needs the pump past its due date. Use HANDS to reissue the pump when this happens.

Navigate to the client's Breast Pump Issuance and Return screen. Then select the pump's serial number.

To reissue a pump, complete the Reissued Due Date field. When finished, select the Save button. The Active Record icon will be updated with the new due date.

Document the breastfeeding assessment, and complete and scan a new breast pump release form according to your Agency's policies and procedures.

7.9 BREAST PUMPS - RETURN A BREAST PUMP



Notes:

When the mom is no longer using the pump, or needs to return it to the clinic, HANDS will help you document the return. On the client's Issuance and Return Screen, select the serial number for the pump that is being returned.

To return a pump, select Returned from the Client Pump Status pick list. This enables the Actual Return Date field. Complete the return date, and select the Save button. The Breast Pump Icon will no longer appear in the client's Active Record.

Follow your Agency's policies and procedures. Complete the return process, which may include completing a return receipt, scanning the receipt, inspecting the pump, cleaning the pump, and returning the pump to storage.

7.10 BREAST PUMPS - CHANGE PUMP AVAILABILITY

Serial Number: 39393939

Client ID: 1021410309

Last Name: CHAMBERLAIN

First Name: JACLYN

MI: E

Serial Number	Client ID	Pump Type	Client Pump Status	Inventory Status	Issued By	Due Date	Released Due Date	Actual Return Date	Referred Date	LAC/In-Form	LAC/In-Form
<input checked="" type="checkbox"/> 39393939	1021410309	HOSPITAL	RETURNED AVAILABLE	09/21/2016	CHAMBERLAIN, JACLYN	12/21/2016	09/22/2016			DOUGLAS DOUG	HEALTH HEAL

Showing 1 of 1

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

The pump is ready to be issued to another client!

Make Pump Available Change Status Issue Search New Search

Notes:

Once the pump has been inspected, cleaned, and added back into inventory, it can be marked as Available in HANDS and issued to another client.

To make returned pumps available in HANDS, navigate to the Breast Pump Issuance and Return screen using the Navigation Menu on the Client Family Search screen. Then, enter the pump's serial number, and select the Search button.

Select the checkbox in the row of the most recent record, and then select the Make Pump Available button found on the bottom of the screen.

A window will appear verifying that you want to make the selected pump or pumps available. Select Yes to continue, or Cancel to return to the main screen. Selecting Yes will display a new window confirming the pump's availability.

Select OK to return to the main screen. The pump is now ready to be issued to another client.

TOGETHER WE CAN (SLIDE LAYER)

JOSEPH H | Home Sys Admin Ops Mgmt WIC Services CSFP Services Scheduling Farmers' Market Finance Vendor Program Integrity Reports Help

B2 - COCHISE COUNTY HEALTH DEPARTMENT / B1 - DOUGLAS HEALTH

breast Pump Issuance and Return

Serial Number 39393939 Client ID Last Name First Name MI

Serial Number	Client ID	Pump Type	Client Pump Status	Inventory Status	Issued By	Due Date	Reissued Due Date	Actual Return Date	Referred Date	LAC Clinic Issued From	LAC Clinic Returned To
39393939	1021410309	HOSPITAL GRADE HYGEIA ENDFEARE	RETURNED	AVAILABLE	09/21/2016	CHAMBERLAIN, JACLYN,	12/21/2016	09/22/2016		DOUGLAS DOUG HEALTH	DOUG HEALTH

Row count: 10 Showing 1.1 of 1

Click on the TogetherWe Can icons on screen to learn more.

Each Agency or clinic may have a different procedure for returning pumps. Be sure to check with your trainer or supervisor for any steps that are specific to your Agency or clinic.

Close

Make Pump Available Change Status Issue Search New Search

TOGETHER WE CAN - COPY (SLIDE LAYER)

JOSEPH H | Home Sys Admin Ops Mgmt WIC Services CSFP Services Scheduling Farmers' Market Finance Vendor Program Integrity Reports Help

B2 - COCHISE COUNTY HEALTH DEPARTMENT / B1 - DOUGLAS HEALTH

breast Pump Issuance and Return

Serial Number 39393939 Client ID

Serial Number	Client ID	Pump Type	Client Pump Status	Inventory Status	Issued By	Due Date	Reissued Due Date	Actual Return Date	Referred Date	LAC Clinic Issued From	LAC Clinic Returned To
39393939	1021410309	HOSPITAL GRADE HYGEIA ENDFEARE	RETURNED	AVAILABLE	09/21/2016	CHAMBERLAIN, JACLYN,	12/21/2016	09/22/2016		DOUGLAS DOUG HEALTH	DOUG HEALTH

Row count: 10 Showing 1.1 of 1

A pump must have an Inventory Status of Returned or Cleaned in order to be made Available.

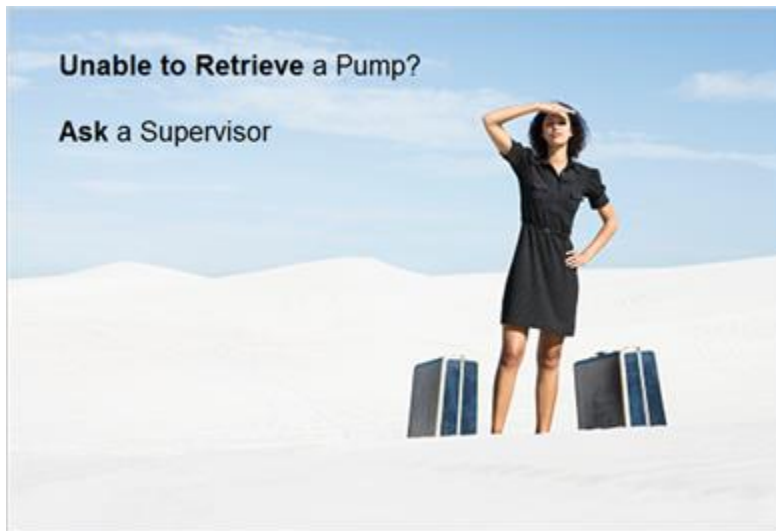
Close

Click on the TogetherWe Can icons on screen to learn more.

The pump is ready to be issued to another client!

Make Pump Available Change Status Issue Search New Search

7.11 TRANSFERS AND OTHER FUNCTIONS



Notes:

When you are searching for a pump in your clinic, it is important to note that only pumps in your clinic's inventory will display.

If the pump belongs to another Agency or clinic, it will not show up in a search. If you receive a pump that is not issued to a client in your clinic, or cannot be found when searching, check with your supervisor.

Sometimes you will be working with a client who has a pump from another agency. When the client transfers into your agency, the pump will transfer with her.

The pump records will automatically transfer into your Agency's inventory so that you may return or reissue it as needed.

When following up with clients, there may be times you are unable to retrieve a pump. Ask your supervisor for more details on how to handle these issues in your clinic.

7.12 SELF-CHECK - REISSUE A BREAST PUMP

Instructions: Select the best answer(s), and then click 'SUBMIT' to check your answer(s).

A breast pump may be reissued in HANDS when (select all that apply):

- ☒ A new breast pump contract has been completed
- ☐ Mom needs it for a friend
- ☐ A new Due Date has been entered in HANDS
- ☒ The Reissued Due Date has been recorded in HANDS

Editing Breast Pump Issuance and Return

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LA/Clinic DOUGLAS HEALTH Family ID 180011581 Auth. Rep. Name PUMP, FIRST Phone	*Serial Number 38383939 *Issue Date 09/21/2016 Due Date 12/21/2016	*Client Pump Status ISSUED Actual Return Date Reissued Due Date	Pump Type HOSPITAL GRADE HYGEM ENCORE LA/Clinic Issued From DOUGLAS HEALTH LA/Clinic Returned To N/A
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7.13 SUMMARY



Notes:

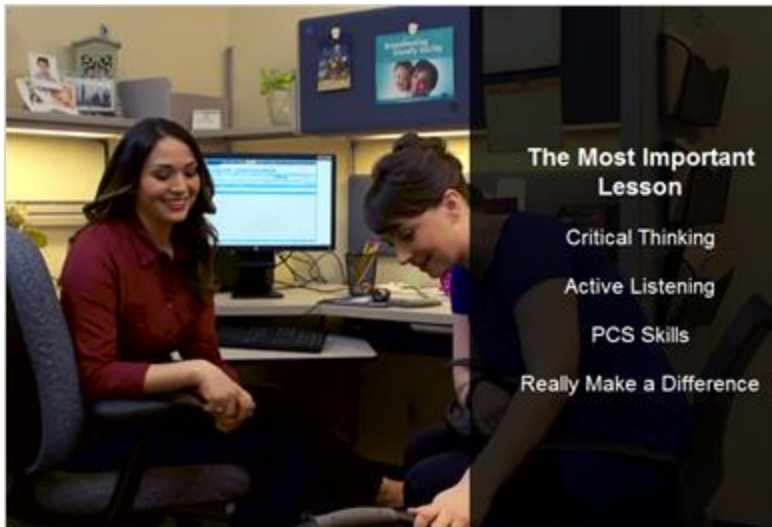
Great Job! You've completed Module 10 of the HANDS New Hire course.

You learned about issuing and returning breast pumps.

You also learned about reissuing pumps and changing a pump's availability.

Next, we'll review the key topics of the HANDS New Hire course.

7.14 CONCLUSION



Notes:

Well done! Let's review some of the key concepts for this part of the course.

First, you learned about starting assessment process using the Medical screen and client growth charts.

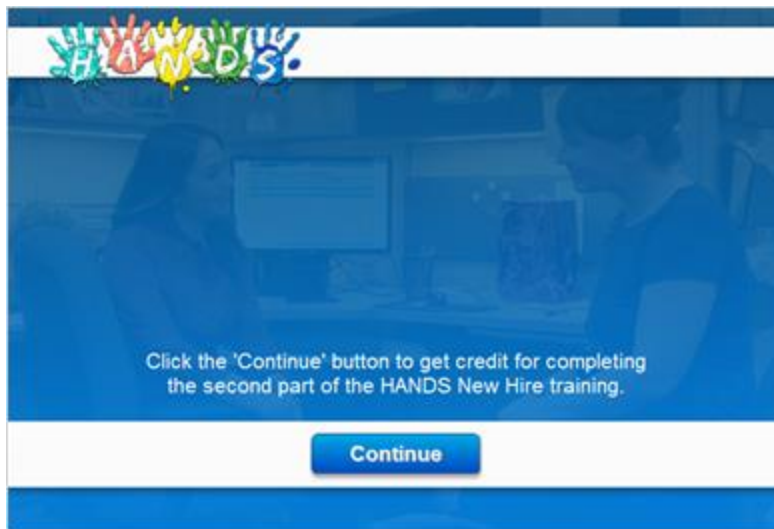
Next, you learned about recording important health and nutrition information using the Breastfeeding Surveillance and Assessment screens.

You also gained the skills needed to schedule appointments and document walk-ins.

Finally, you explored screens that assist with other important processes, including precertification, transferring clients and families, and managing breast pumps.

Throughout the course, you also learned the most important lesson of all, that your critical thinking, active listening, and participant-centered service skills are what really make a difference in the lives of your clients.

7.15 COMPLETION



Notes:

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

7.16 CONGRATULATIONS



Notes:

You've completed Part 2 of the HANDS New Hire Training!

To get credit for the HANDS New Hire Training Part 2, you will need to pass the HANDS New Hire Part 2 Post-Test. Click the 'X' (upper right) to close this course and go back to the LMS where you can launch the Post-Test.