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.

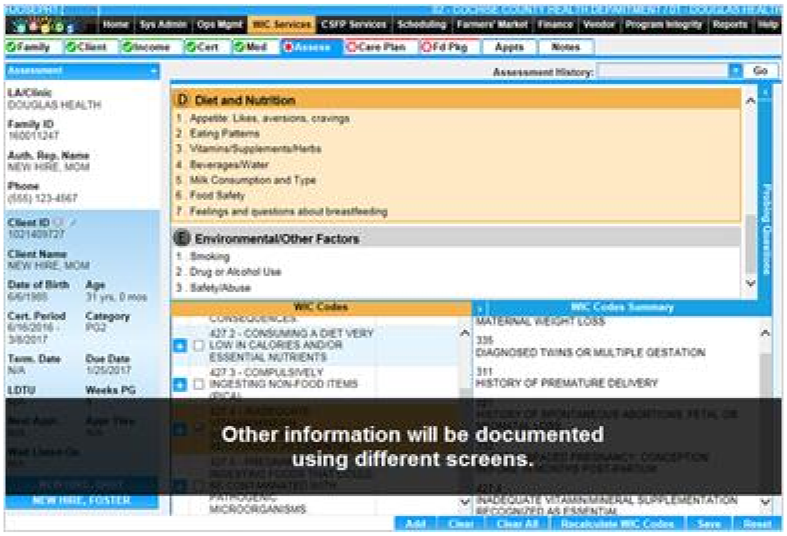
Building this rapport enables you to offer support and assistance tailored to each client.

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



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.

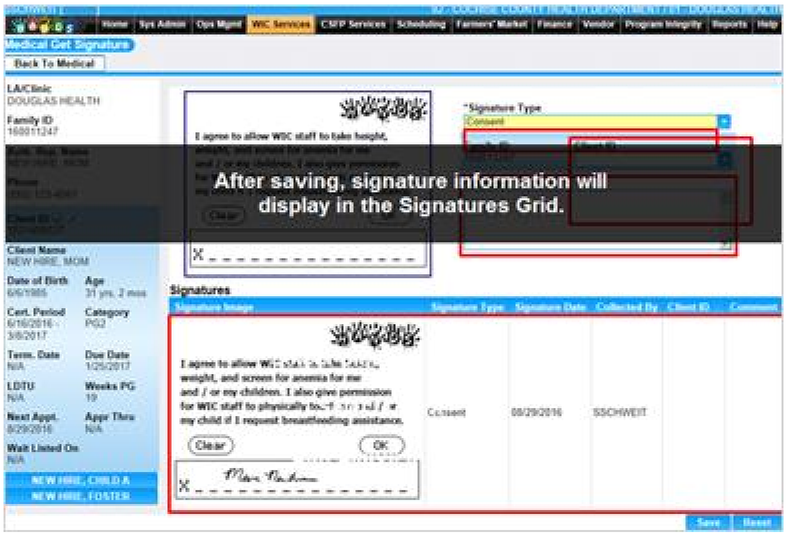
Blood work screens clients for risk of anemia, or low hemoglobin. Low hemoglobin can be due to a number of factors, including low iron intake.

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



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:

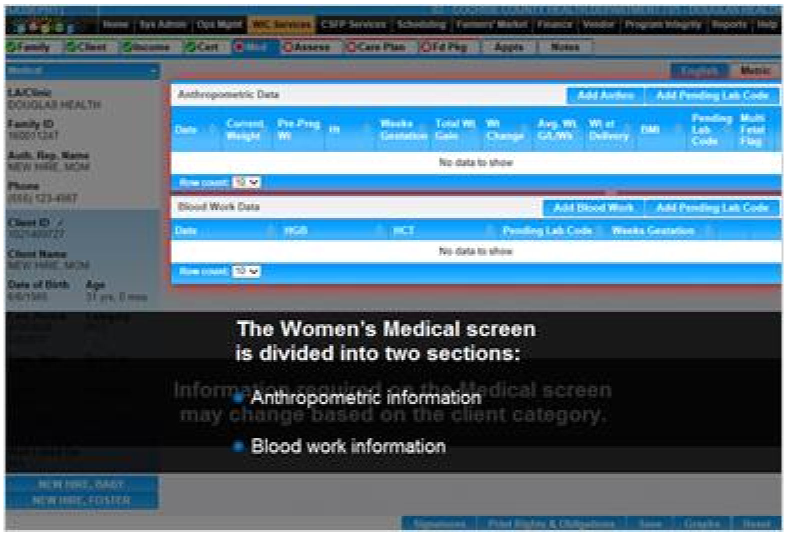
- Measure height and weight
- Collect hemoglobin
- Physically touch the client or her child during breastfeeding instruction

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.

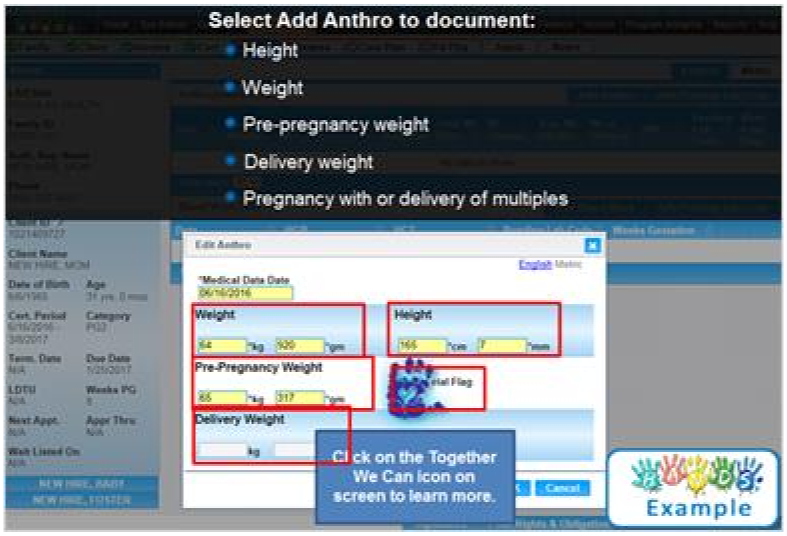
1.5 WOMEN MEDICAL



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



Notes:

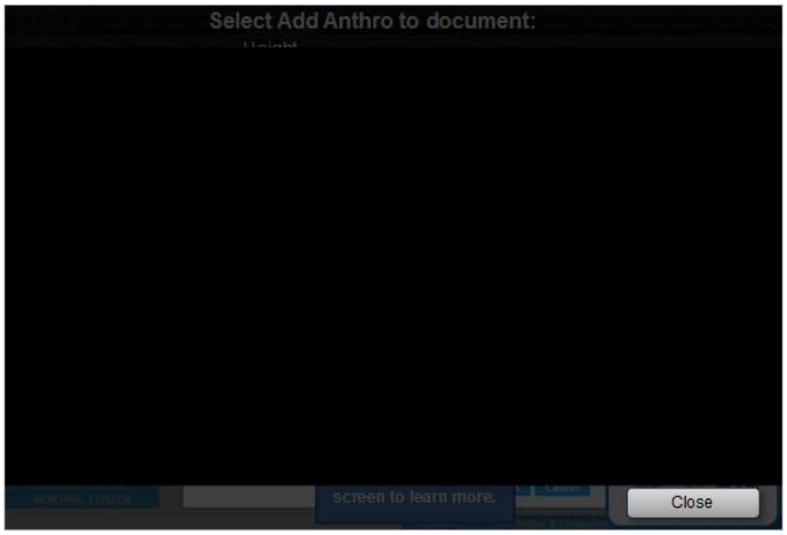
Let’s talk about the Anthropometric Data section first.
Select the Add Anthro button to document information for your client, including:

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

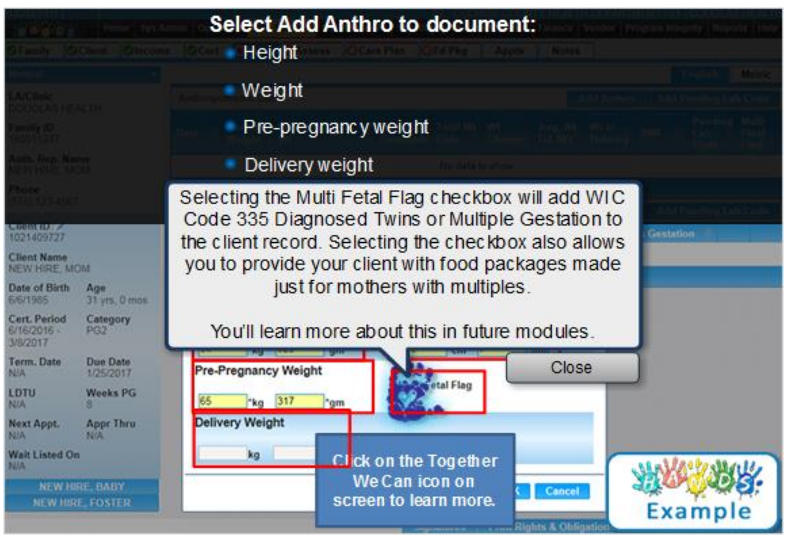
Throughout the course, you’ll see an icon called the Together We Can icon, which will remind you to focus on the needs of the client. The Together We Can icon will be followed by either a Policy or a Participant Centered Services (PCS) tip. These tips will help you use HANDS to best serve the client.

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

Notes:

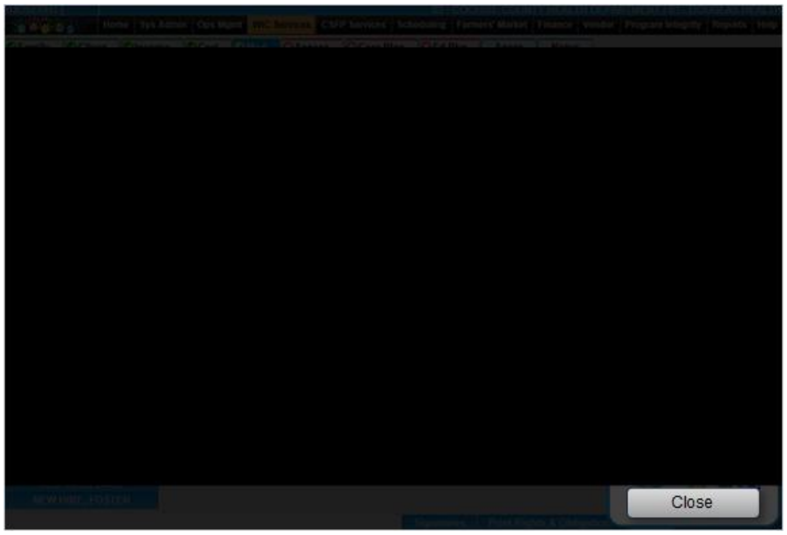
Next, enter the client's blood work information on the Blood Work Data grid. Select the Add Blood Work button to document either Hemoglobin (HGB) or Hematocrit (HCT).

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.

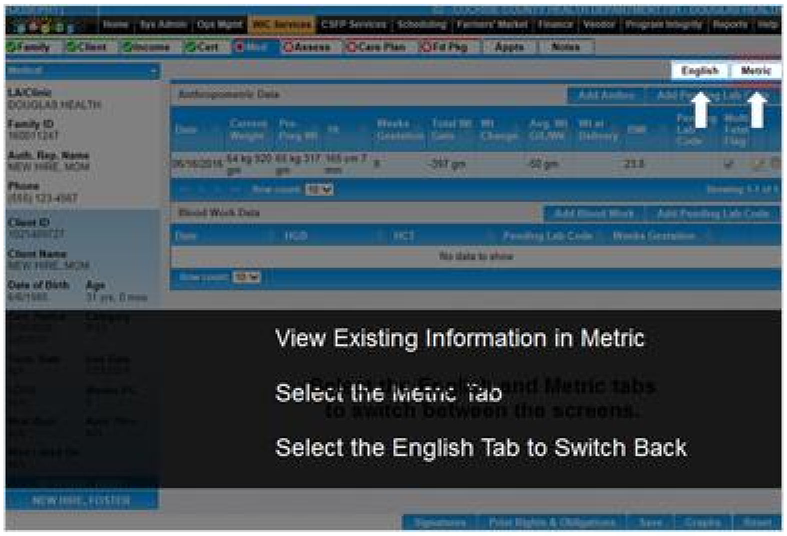
Select the Save button after you've finished entering information on the screen.

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



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.

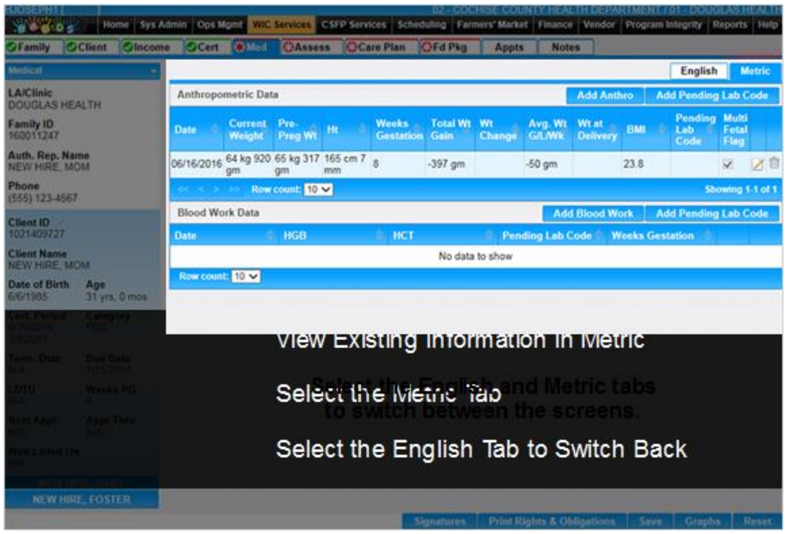
To add Metric measurements, select Metric on the Add pop-up before you enter the information.

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.

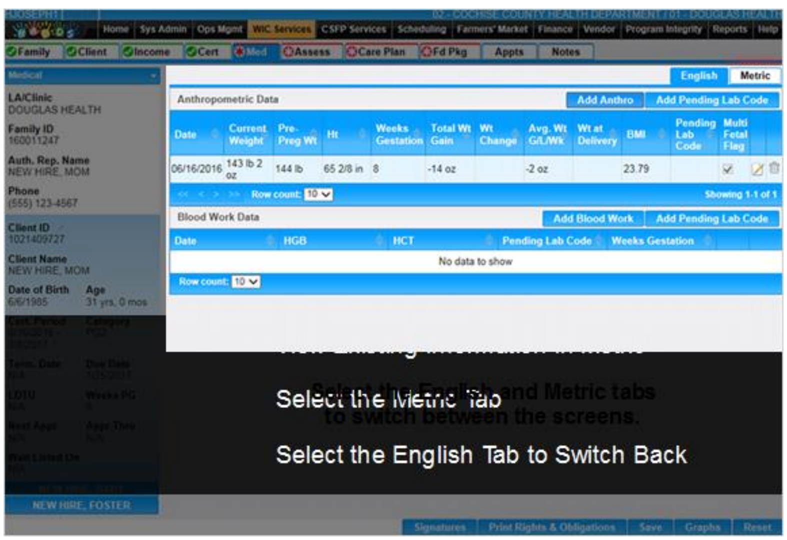
This option will not change the view on the main screen. You will still need to select Metric as discussed to add information using metric measurements.

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

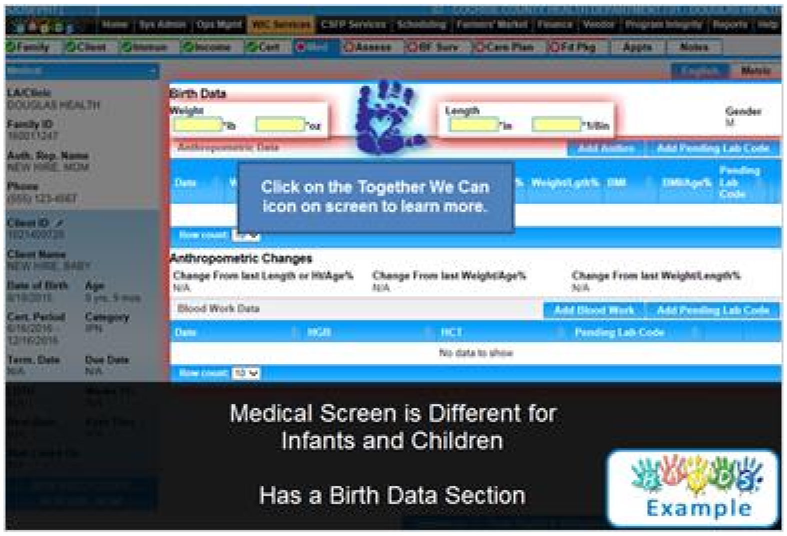
ENGLISH (SLIDE LAYER)



METRIC (SLIDE LAYER)



1.9 INFANT/CHILD MEDICAL

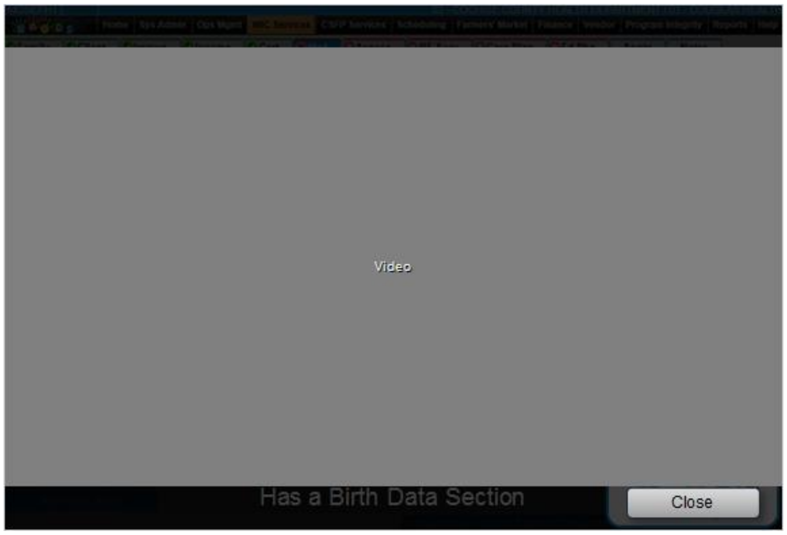


Notes:

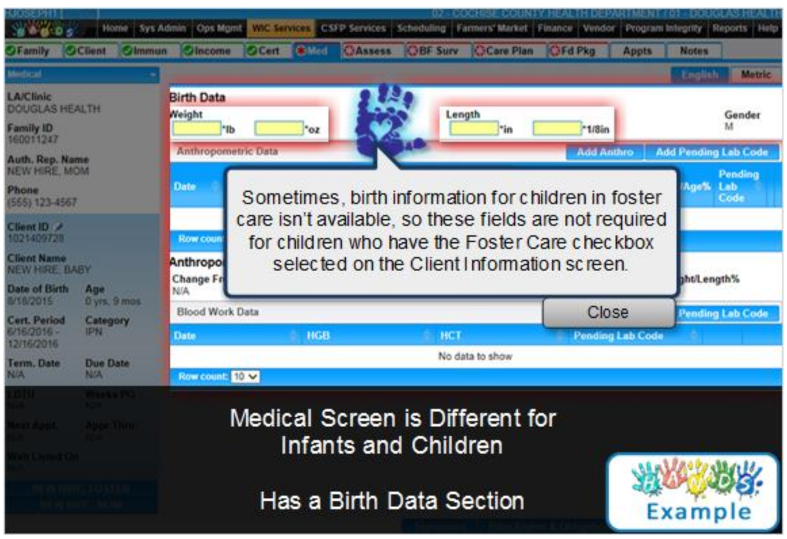
The Medical screen is a little bit different for infants and children than it is for women. The screen still has both the Anthropometric and the Blood Work sections; however, there is an additional section at the top of the screen. This section is titled Birth Data and is where you enter birth weight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

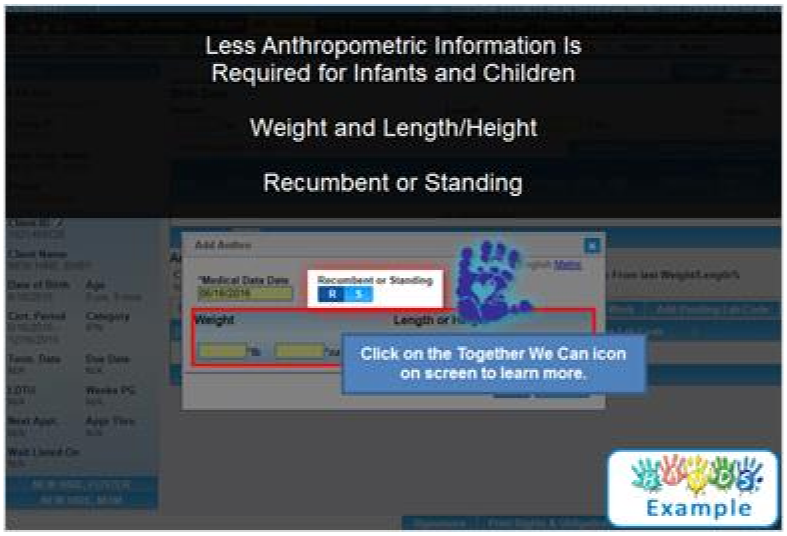
VIDEO EXAMPLE (SLIDE LAYER)



TOGETHER WE CAN (SLIDE LAYER)



1.10 INFANT/CHILD MEDICAL - ANTHROPOMETRICS AND BLOODWORK



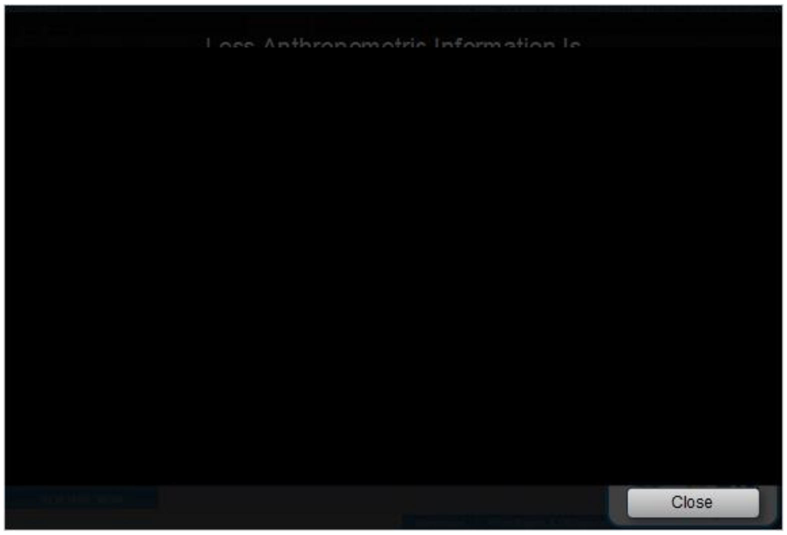
Notes:

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.

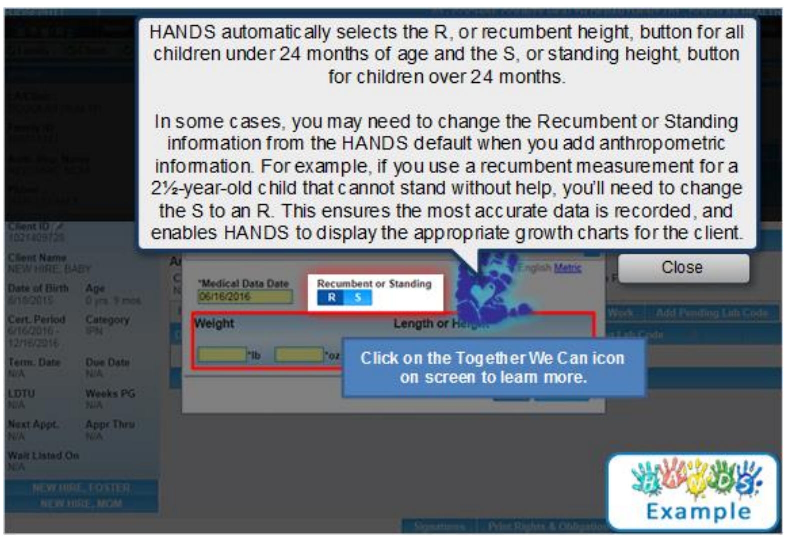
Enter two fields, Weight, and either Length or Height, depending on how the client was measured, then document whether you measured the recumbent length or standing height for the client using the R or S buttons.

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

Notes:

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

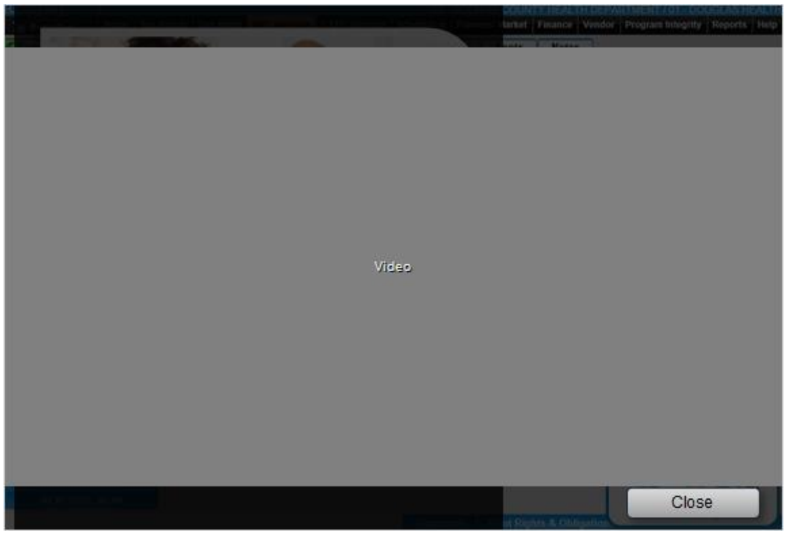
If this happens, use the Add Pending Lab Code button to document the reason that the information is not available. After selecting the appropriate code, select the OK button to add the information to the grid.

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.

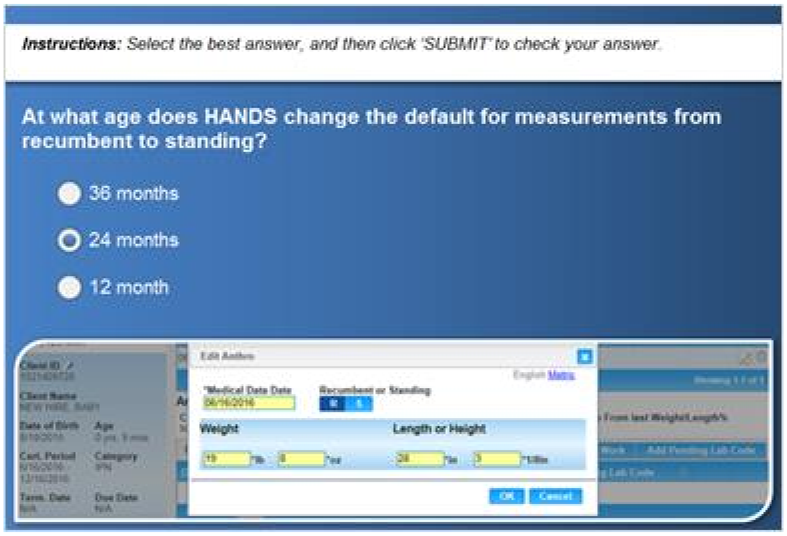
To view an example of how adding a Pending Lab Code looks using HANDS, click the Example button.

VIDEO EXAMPLE (SLIDE LAYER)



TOGETHER WE CAN (SLIDE LAYER)

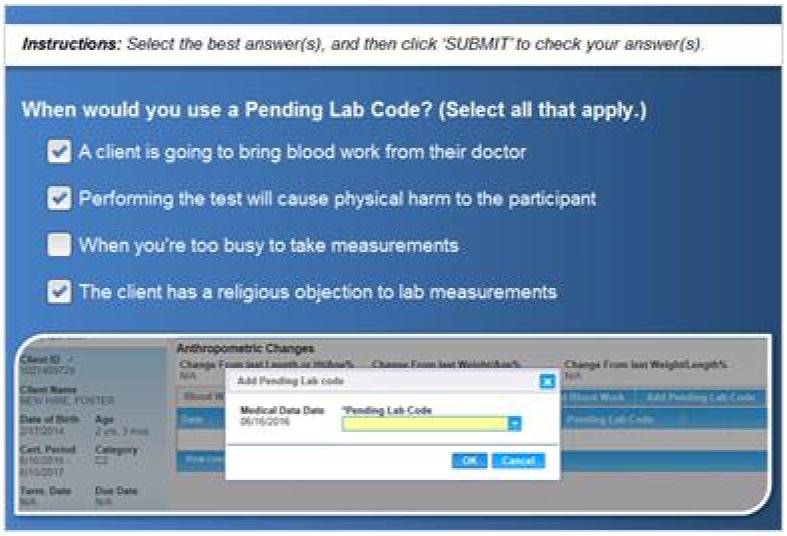
1.12 SELF-CHECK - RECUMBENT OR STANDING?



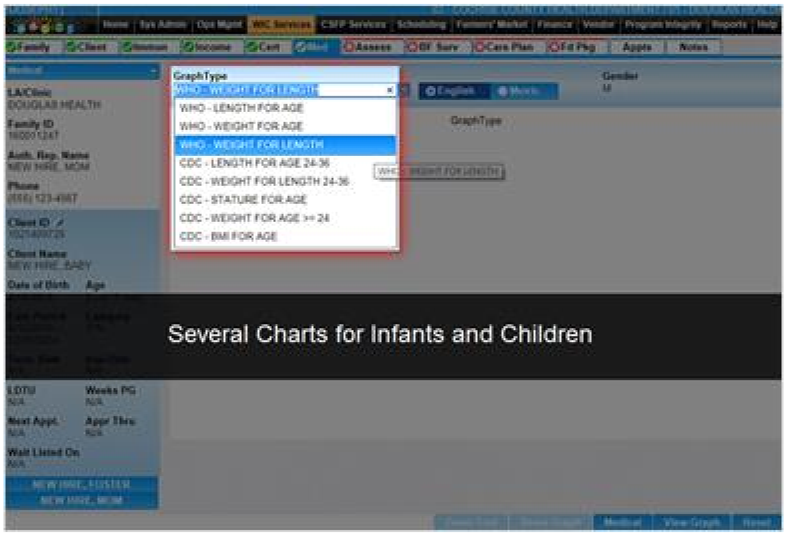
Notes:

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



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.

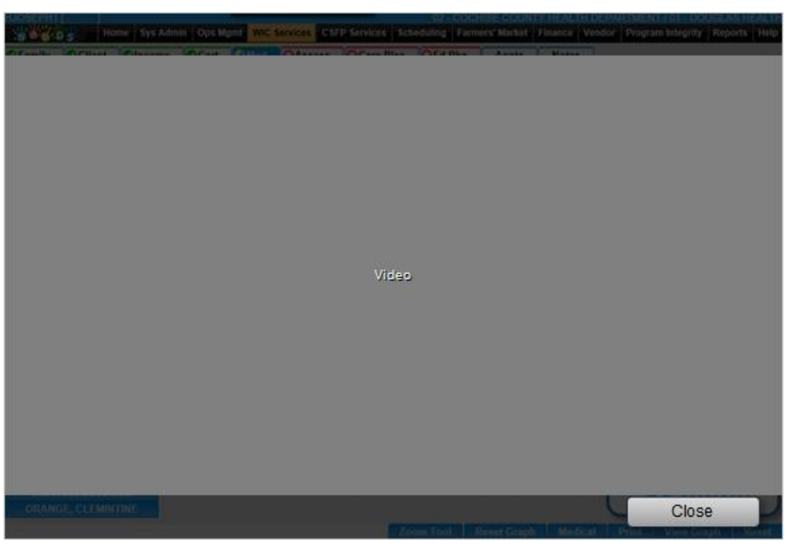
1.15 MEDICAL - GESTATIONAL WEIGHT GAIN GRID

Notes:

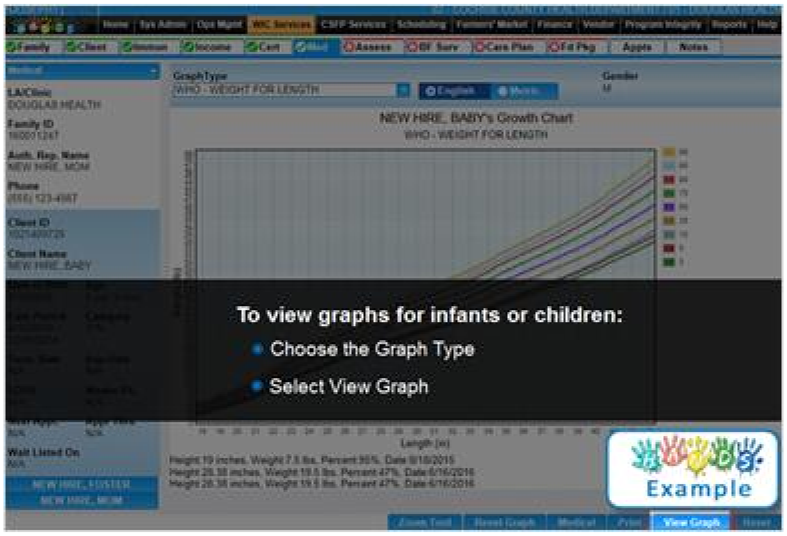
View a client's Gestational Weight Gain by selecting the Graphs button on the Medical screen. This will take you to the Graphs screen. Once there; choose the graph you want to view using the Graph Type pick list.

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



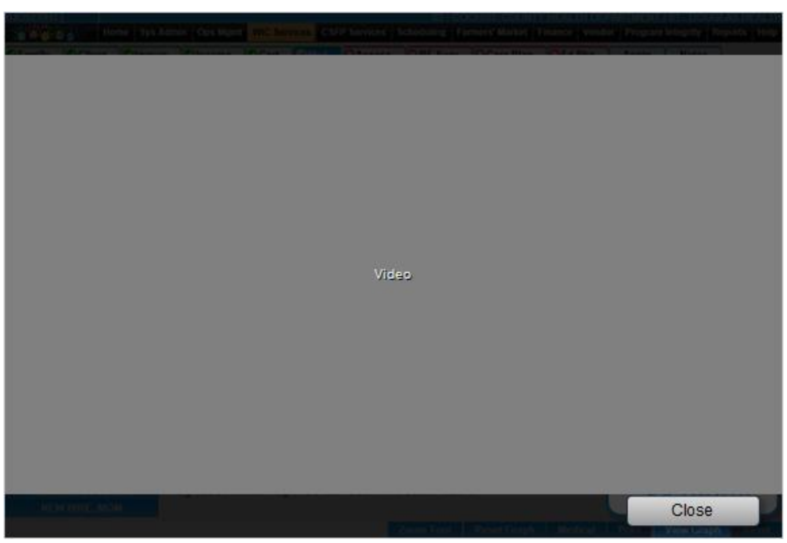
Notes:

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.

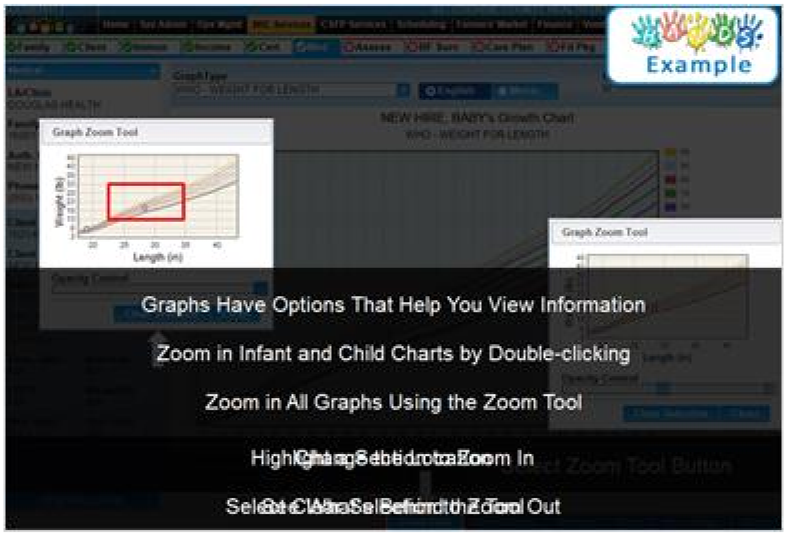
If you choose another growth chart from the pick list, or switch a chart from English to Metric, select the View Graph button again.

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.

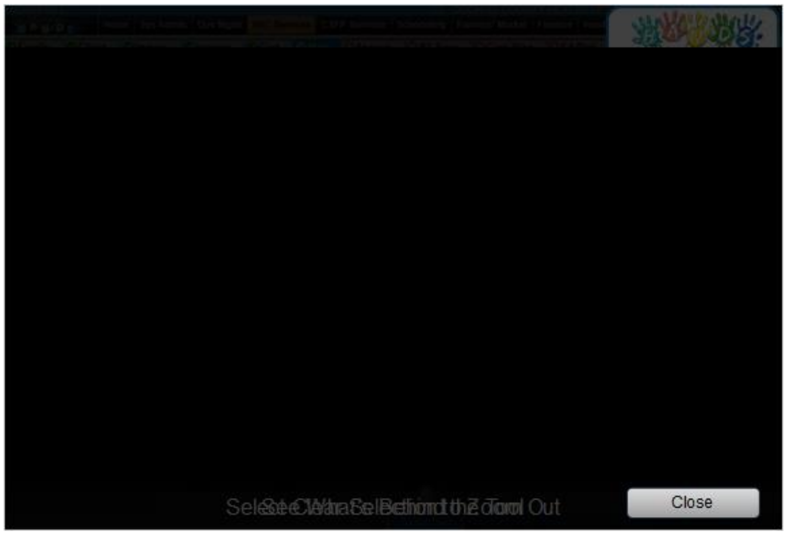
You can zoom in the infant and child growth charts by double-clicking on the area you want to see, and you can zoom in all graph types by using the Zoom Tool.

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.

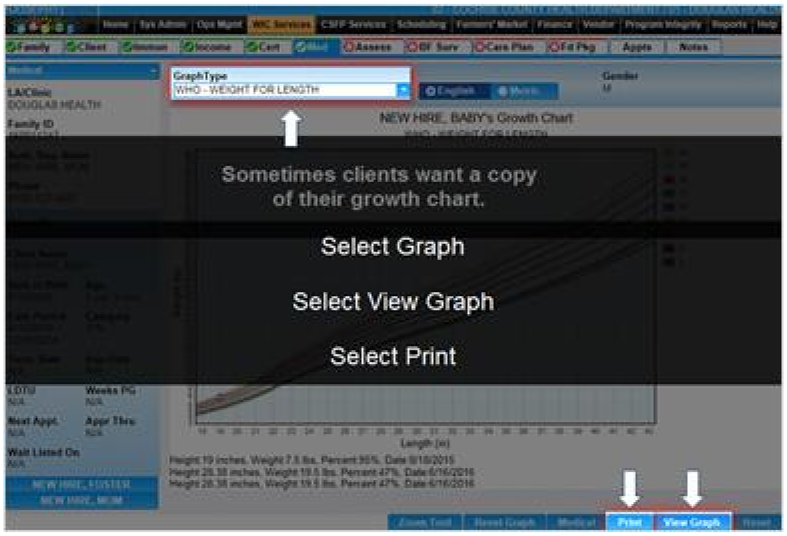
Change the location of the tool by dragging it to another section of the screen. You can also see what's behind the tool by sliding the opacity control.

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: (T*urns 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… (t*he audio fades, the video blurs and jumps forward to later in the conversation)*

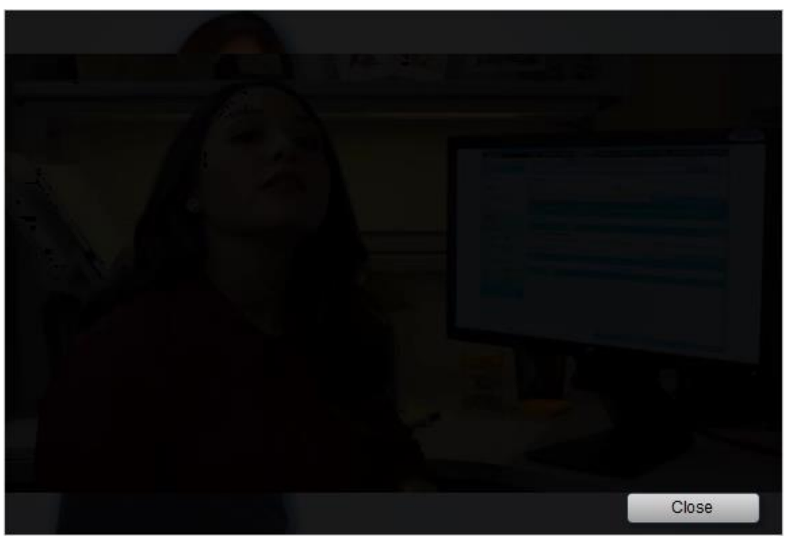
Lorena: So, I just want to do a quick review to make sure I have everything. So, Amaya is growing well, she's eating well and both you and your doctor are happy with her progress so far. You've started giving her solid food, and she seems to really like the bananas and avocados - so that's going well 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.

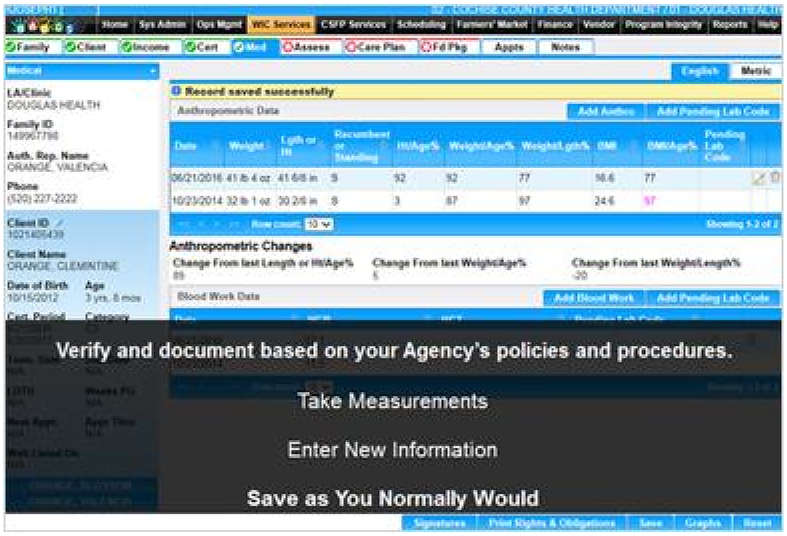
Lorena: (S*he makes a quick mark on her note tracker) OK* so you've been adding the cereal to the bottle, but you're not too sure if it's working - is there anything else about her eating that we've missed?

Yvonne: (S*hakes her head no) No*.

VIDEO EXAMPLE (SLIDE LAYER)



1.20 MEDICAL - SUBSEQUENT CERTIFICATIONS AND UPDATES



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:

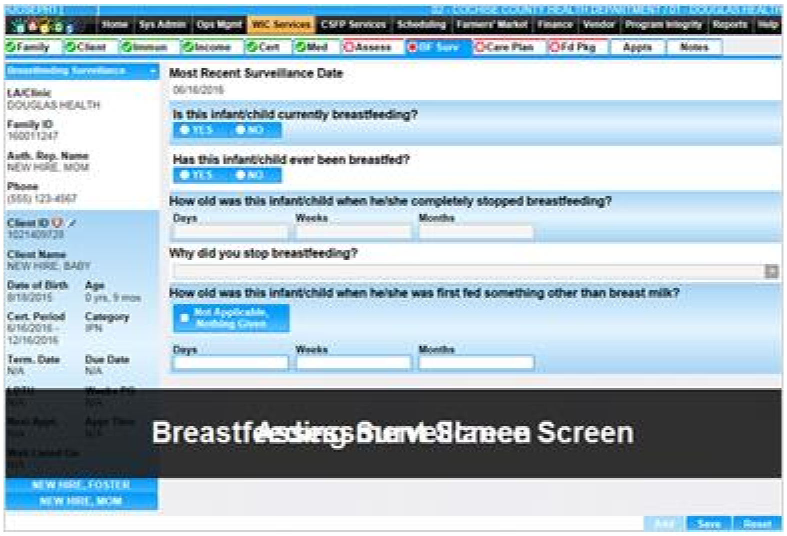
Congratulations! You've completed Module 4 of the HANDS New Hire course.
In this module, you learned how to start the assessment process.

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



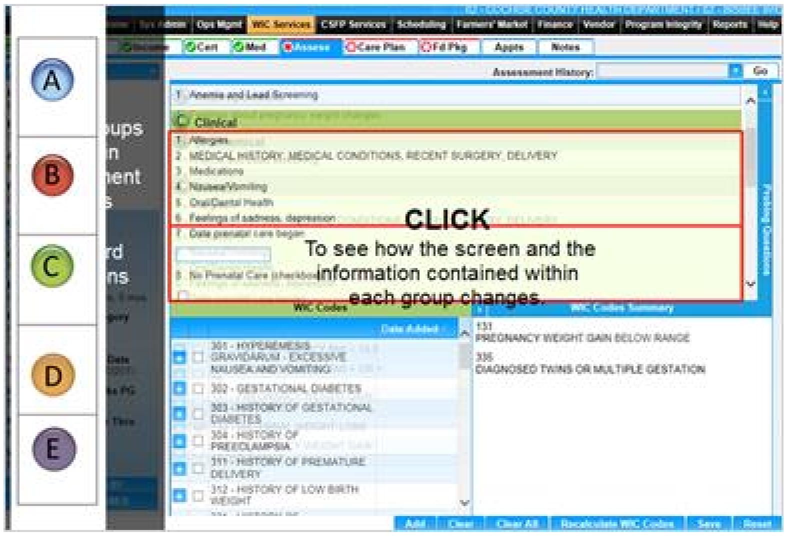
Notes:

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:

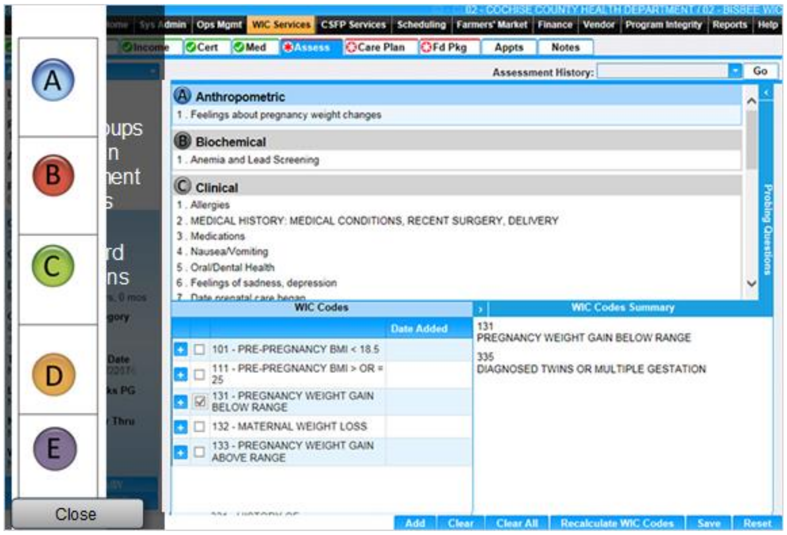
There are four sections on the Assessment screen. Section one, located in the top-left of the screen, consists of the Main Groups, which are A - Anthropometric, B - Biochemical, C - Clinical, D - Diet and Nutrition, and E - Environmental and/or Other Factors.

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.

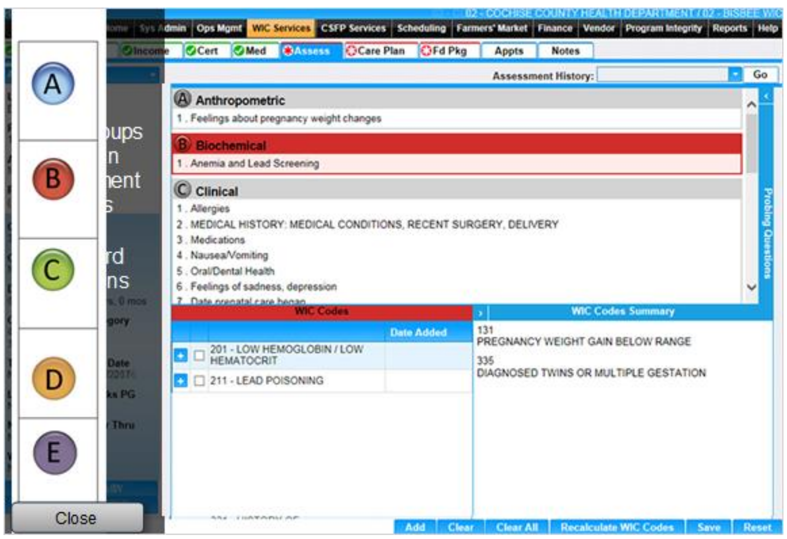
Each Main Group contains Assessment Topics, or general areas on which to focus. These groups may also have Standard Questions, which require you to enter information and may cause the assignment of WIC Codes.

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.

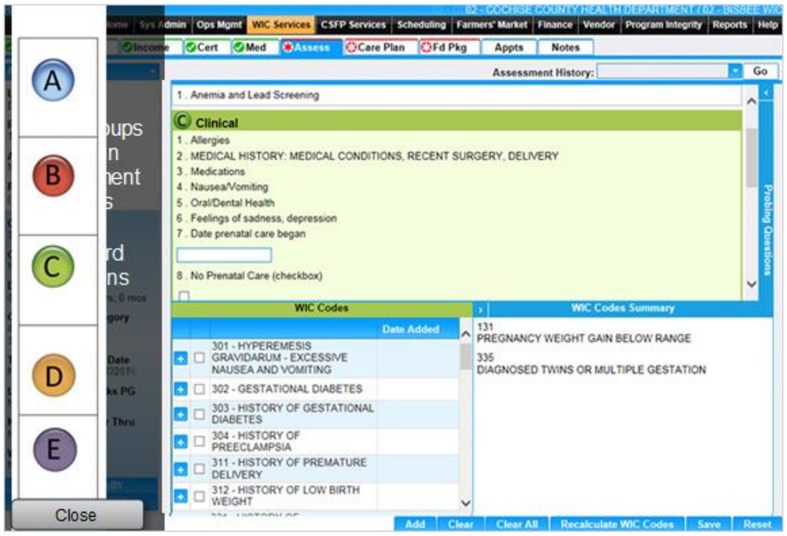
1 (SLIDE LAYER)



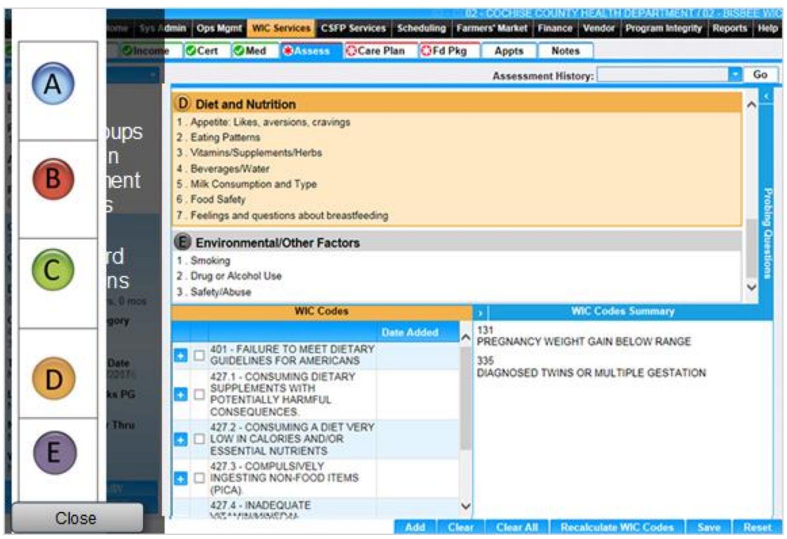
2 (SLIDE LAYER)



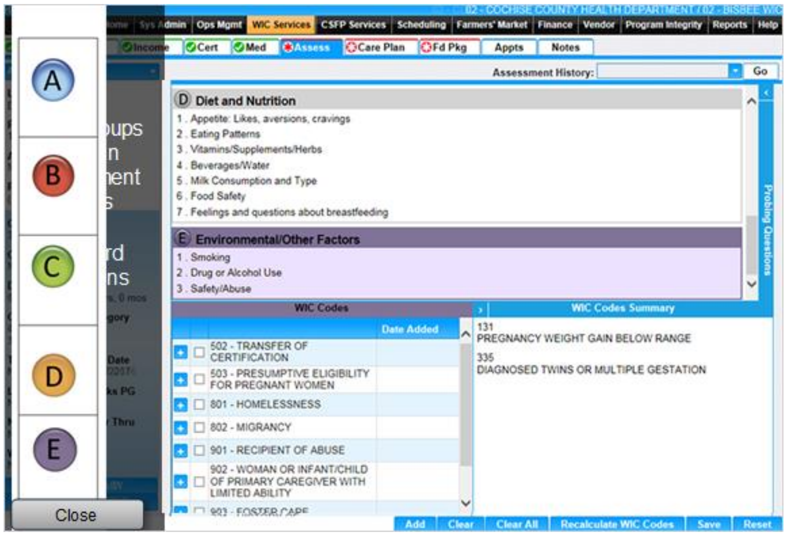
3 (SLIDE LAYER)



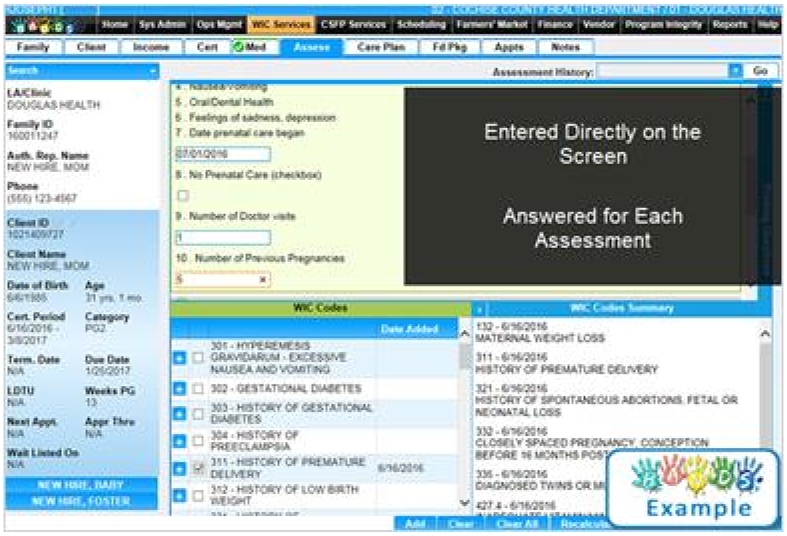
4 (SLIDE LAYER)



5 (SLIDE LAYER)



2.3 ASSESSMENT - STANDARD QUESTIONS



Notes:

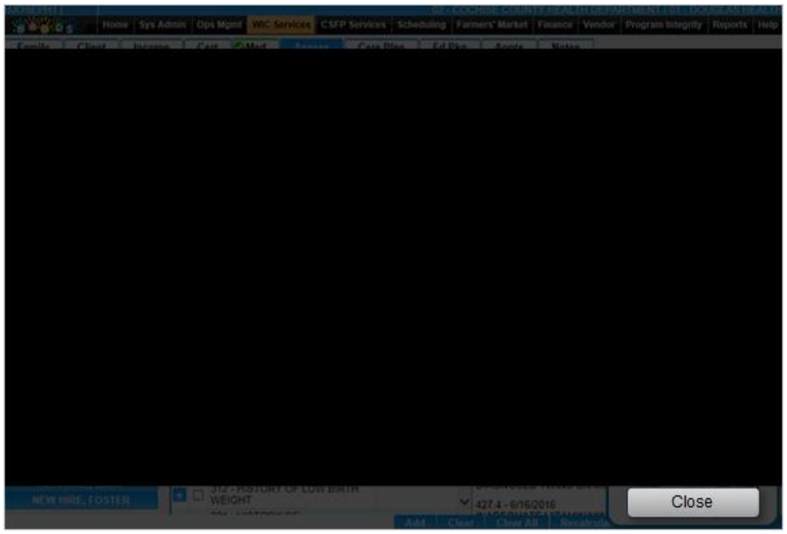
Some assessments may contain what are referred to as Standard Questions. Standard Questions change based on the client category, and cover topics from infant feeding to prenatal care.

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.

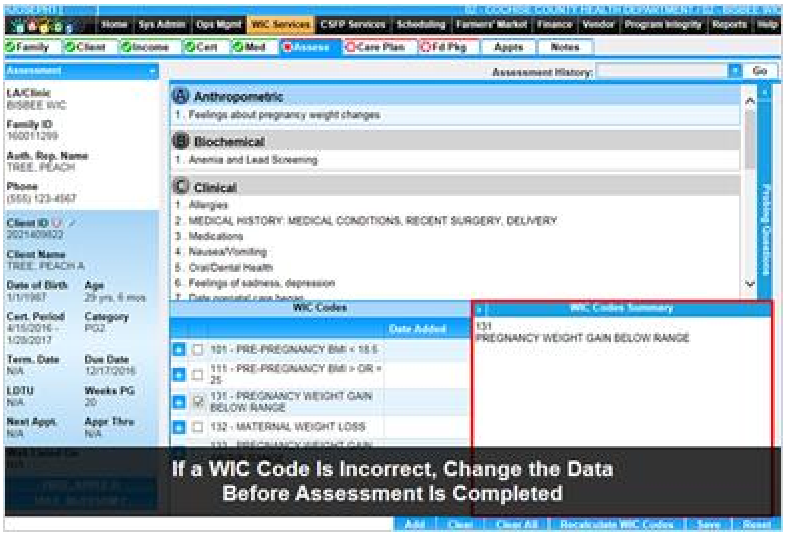
The answers to the Standard Questions are entered directly into the fields on the screen and will need to be answered each time a new assessment is added.

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



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.

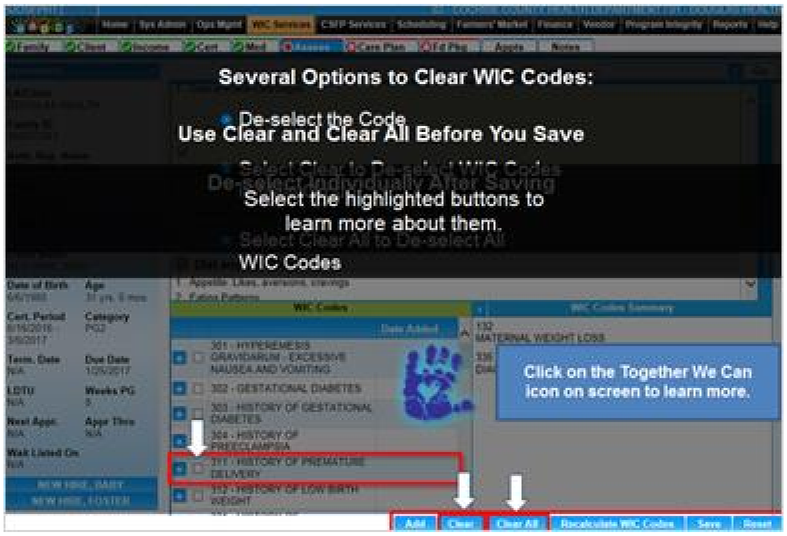
Notice that the header changes color based on the Main Group you have selected for easy identification of the section you are on. For example, the header will be red if you select B in the Main Group section.

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.

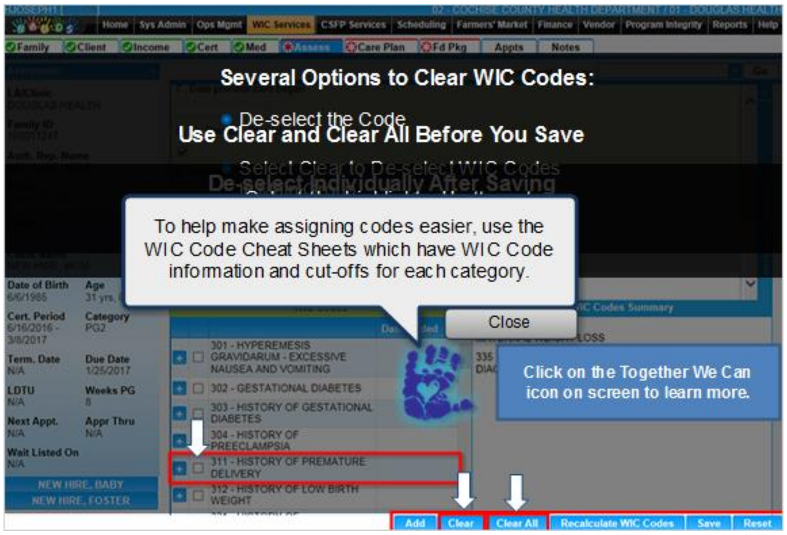
To de-select all codes in the Main Group you are working with, select the Clear button.

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

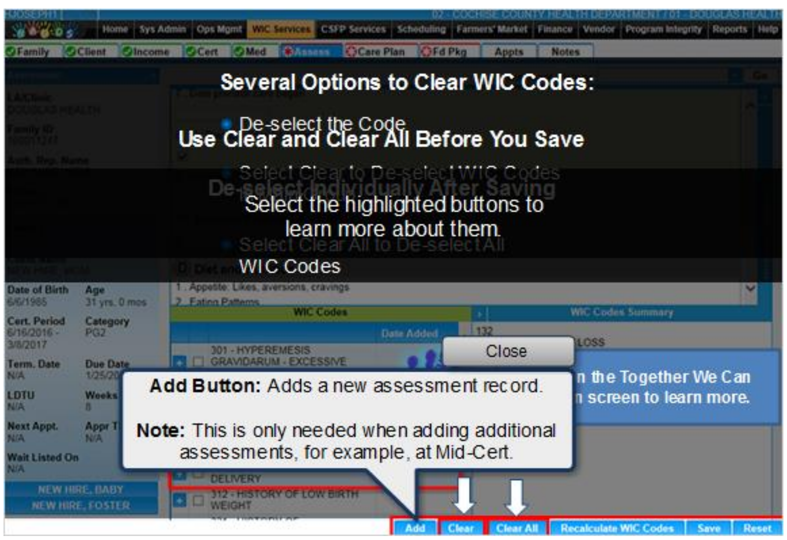
The Clear and Clear All buttons only work before the assessment is saved. After saving, WIC Codes need to be de-selected individually.

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

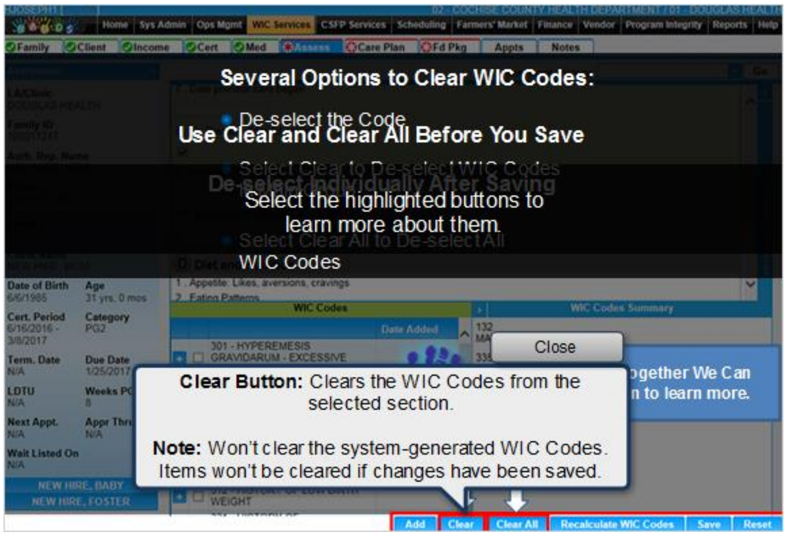
TOGETHER (SLIDE LAYER)



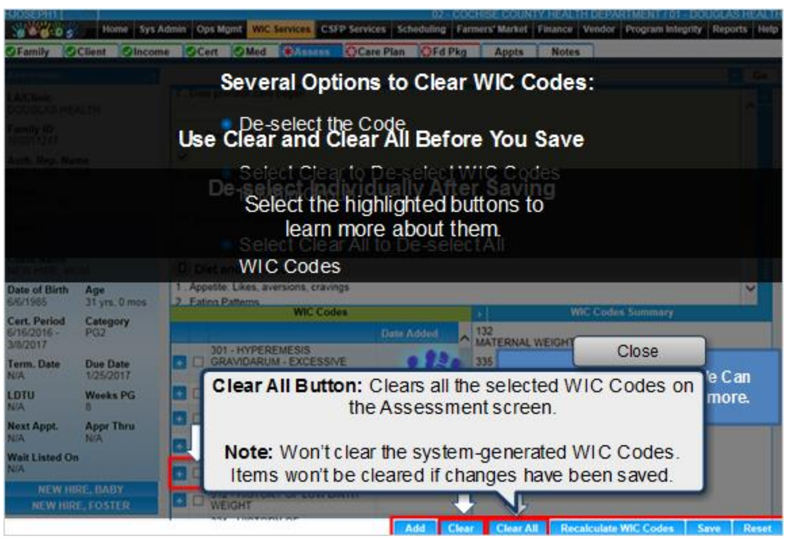
01 (SLIDE LAYER)



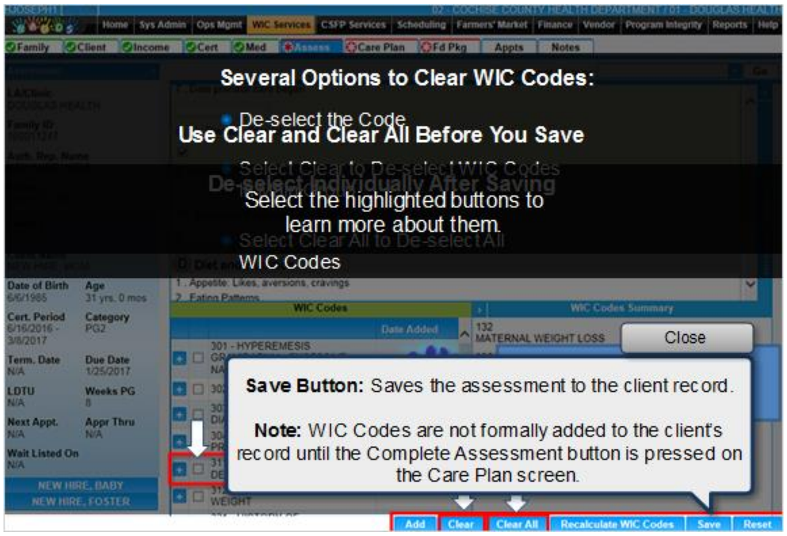
02 (SLIDE LAYER)



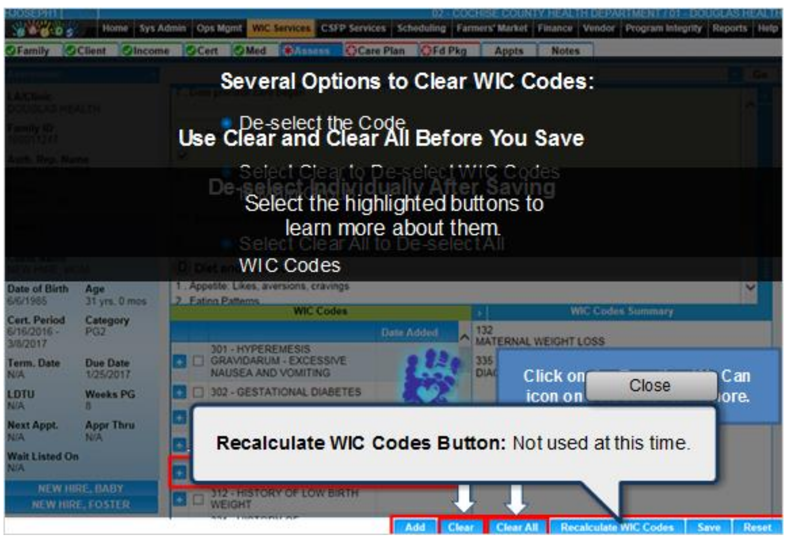
03 (SLIDE LAYER)



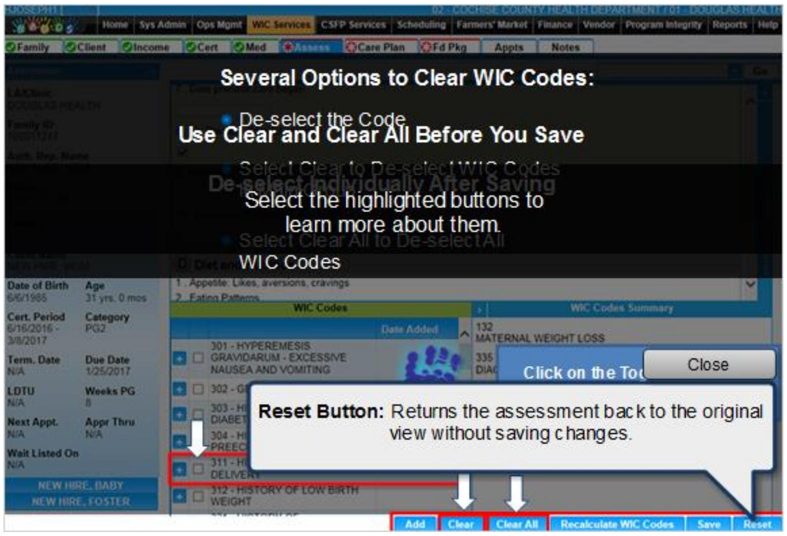
04 (SLIDE LAYER)



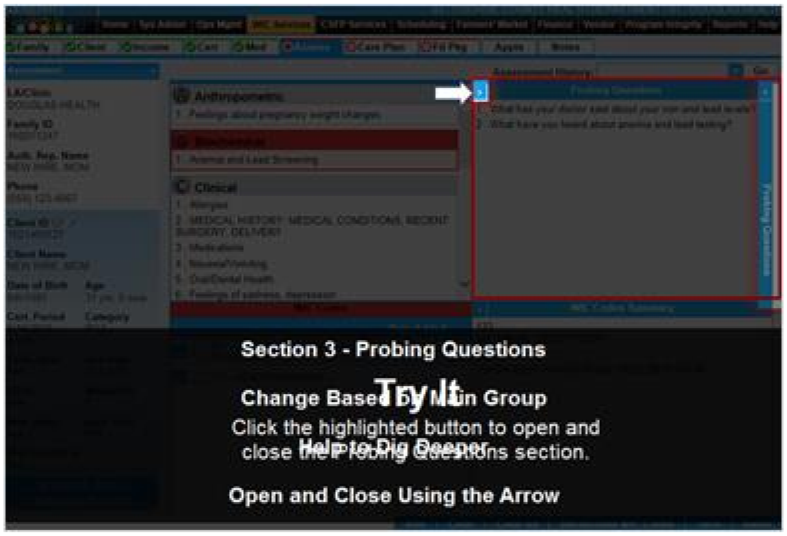
05 (SLIDE LAYER)



06 (SLIDE LAYER)



2.6 ASSESSMENT - PROBING QUESTIONS



Notes:

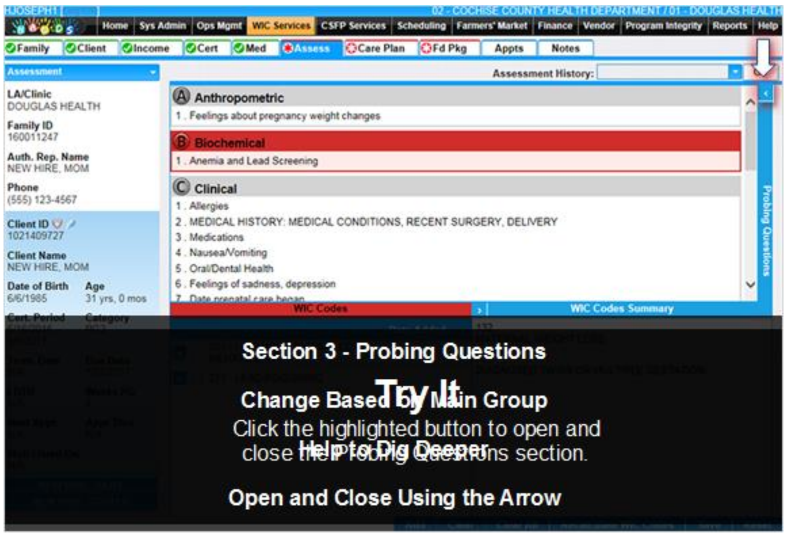
Section three, which is hidden in the top-right of the screen, contains Probing Questions. Like the WIC Codes, the questions in this section change based on the Main Group selected.

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

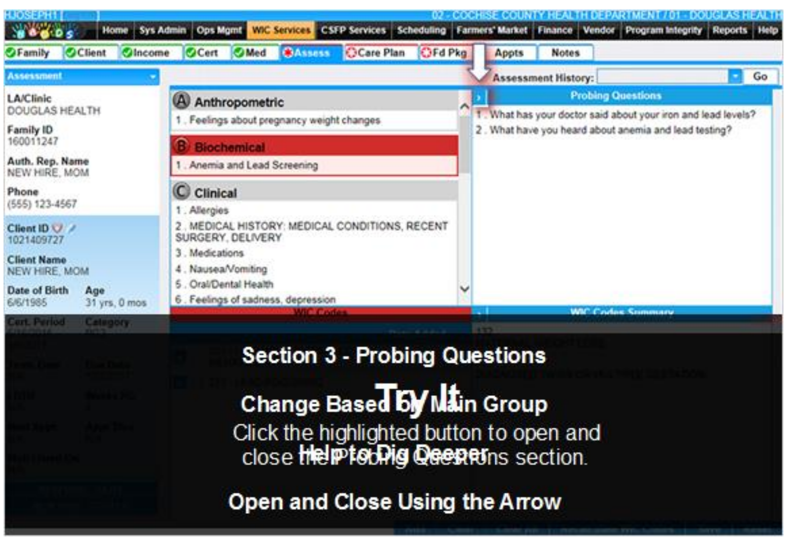
You can open and close the Probing Questions section using the small white arrow located in the upper-left corner of the section.

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

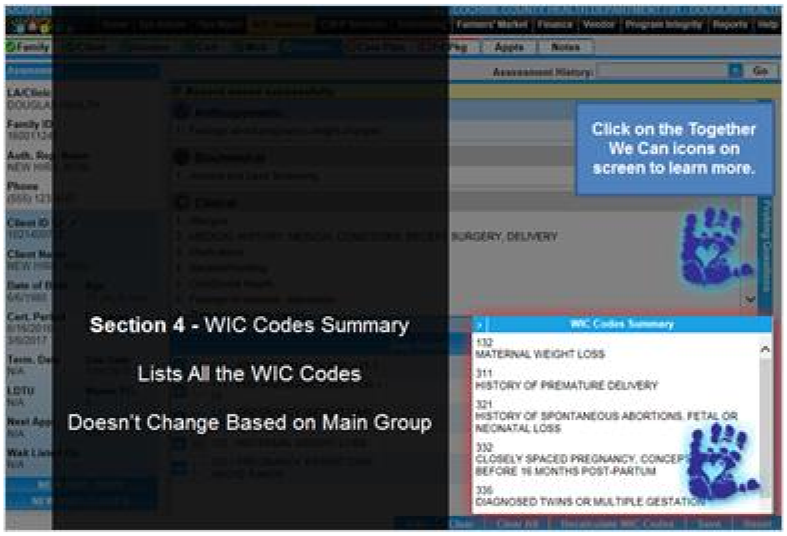
01 (SLIDE LAYER)



02 (SLIDE LAYER)



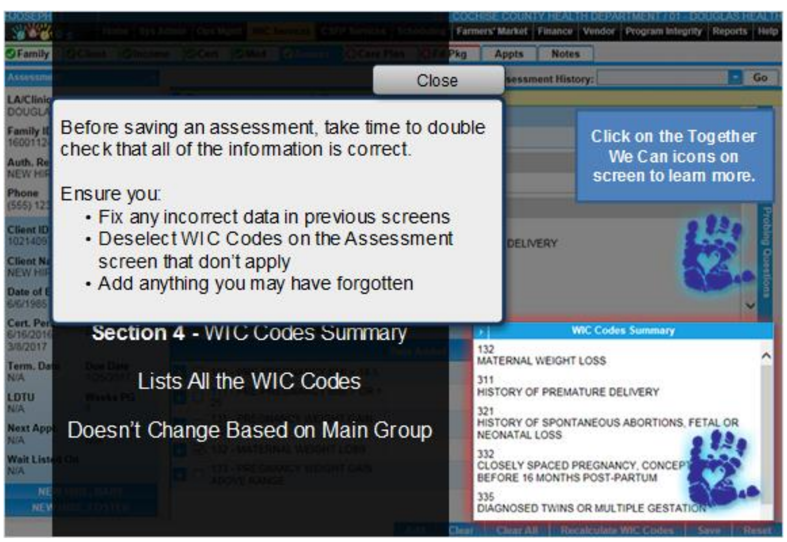
2.7 ASSESSMENT - WIC CODES SUMMARY



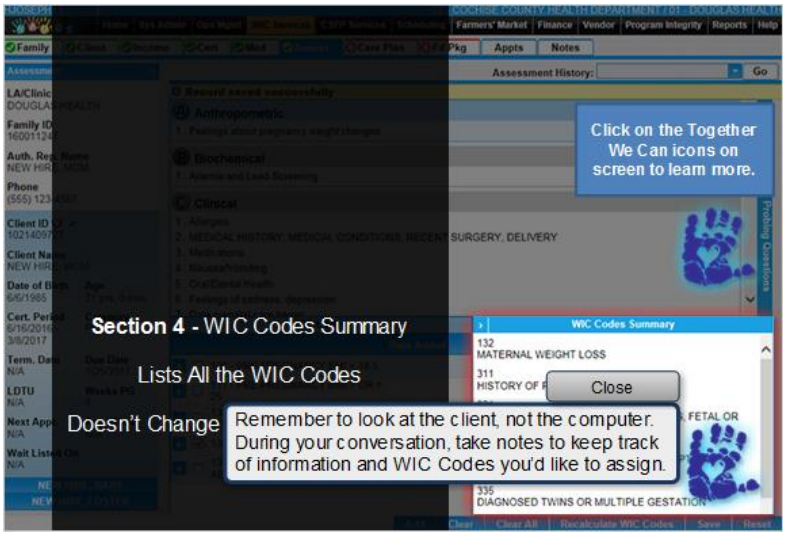
Notes:

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.

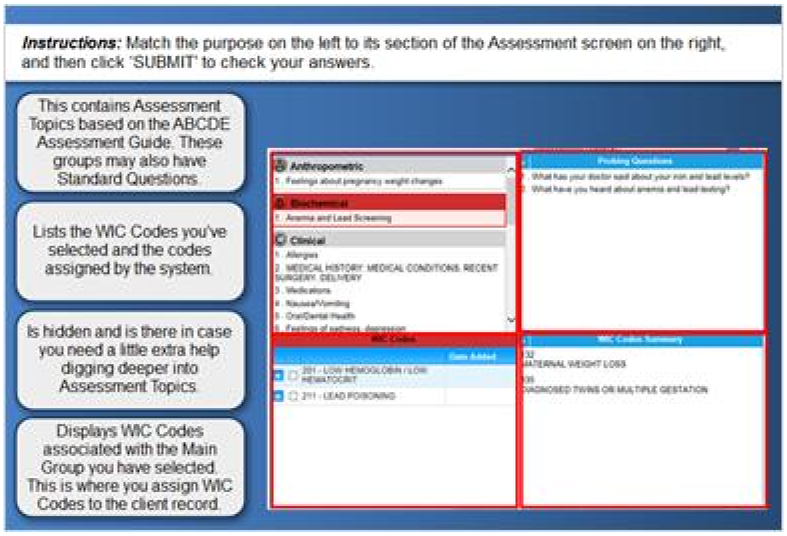
01 (SLIDE LAYER)



02 (SLIDE LAYER)



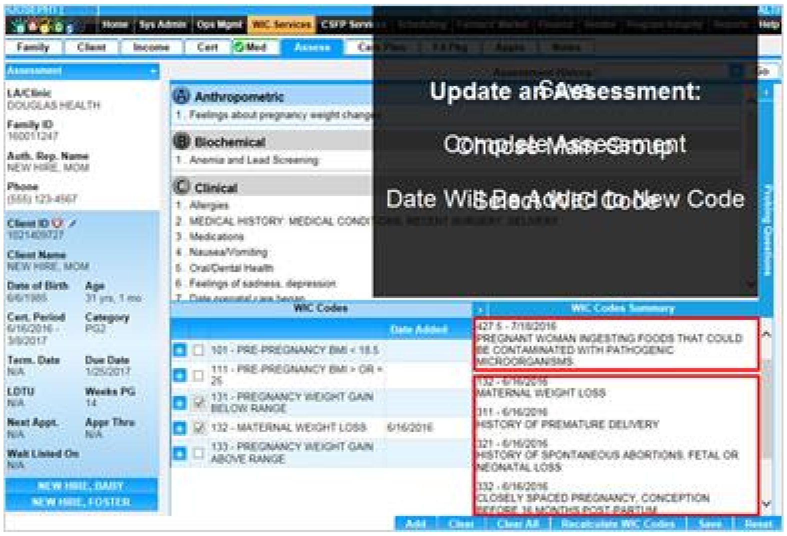
2.8 SELF-CHECK - ASSESSMENT SECTIONS



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



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.

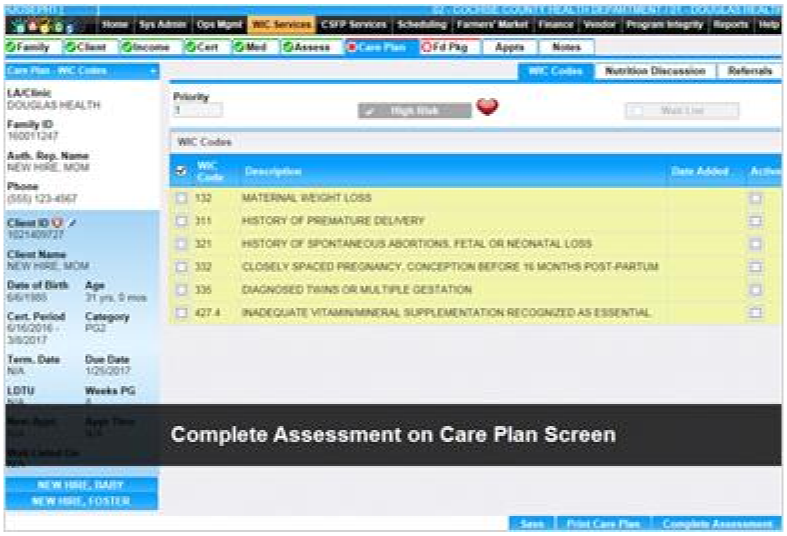
Update an assessment when the client provides information related to his or her health or nutrition status that leads to the assignment of more WIC Codes.

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



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.

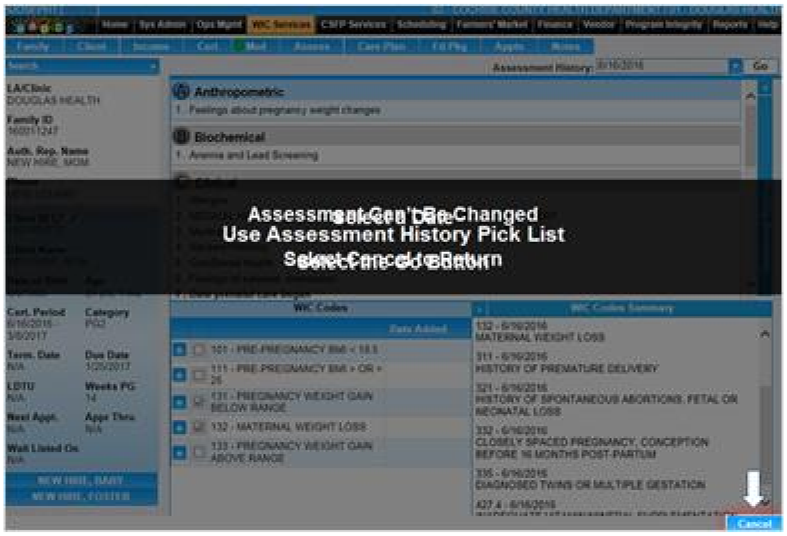
Select any WIC Codes that were discovered during the new ABCDE Assessment.

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

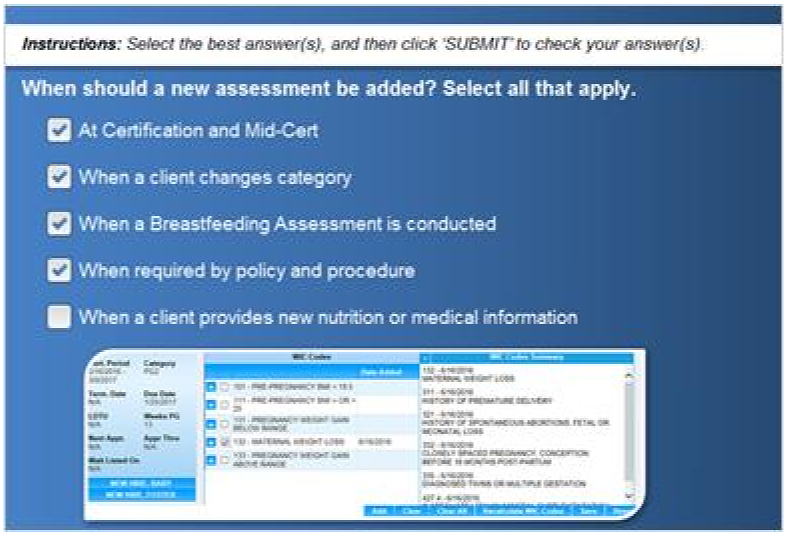


Notes:

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



2.13 BREASTFEEDING SURVEILLANCE

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.

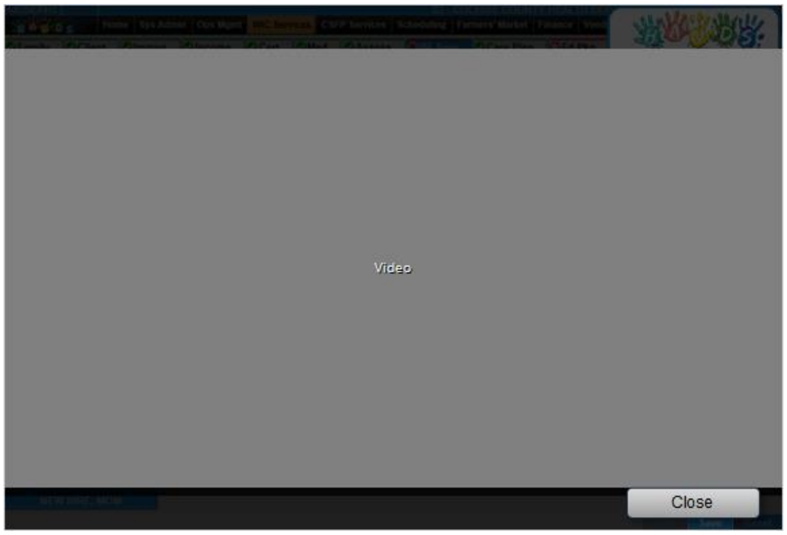
The Breastfeeding Surveillance screen collects information on breastfeeding initiation, duration, as well as the reason the client stopped breastfeeding, and exclusivity.

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.

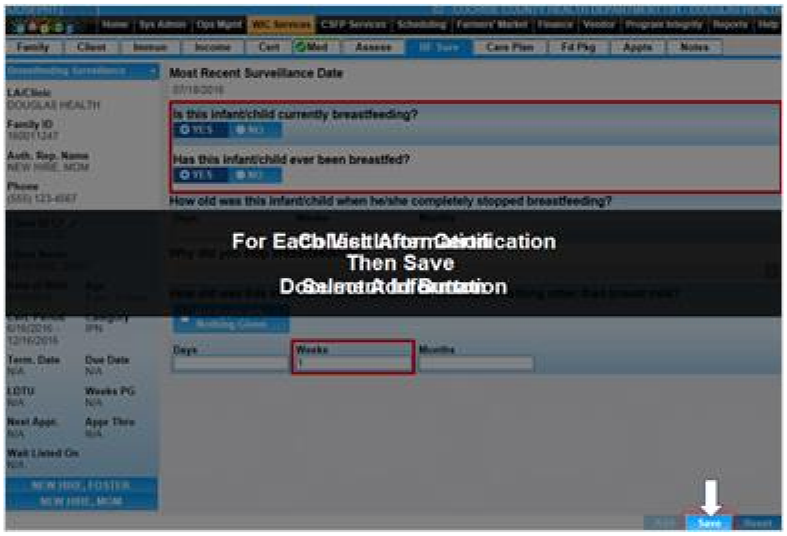
Work with the Authorized Rep. to collect breastfeeding initiation, duration, and exclusivity information. Then, complete the fields by entering data directly on the screen. If the client has stopped breastfeeding, select the reason why from the pick list. When finished, select the Save button.

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



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

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.

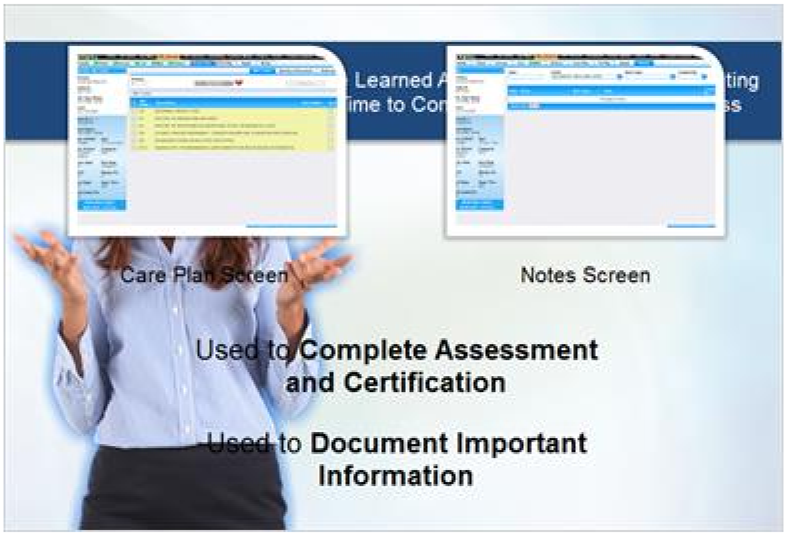
You learned about using the Assessment screen to record important health and nutrition information.

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



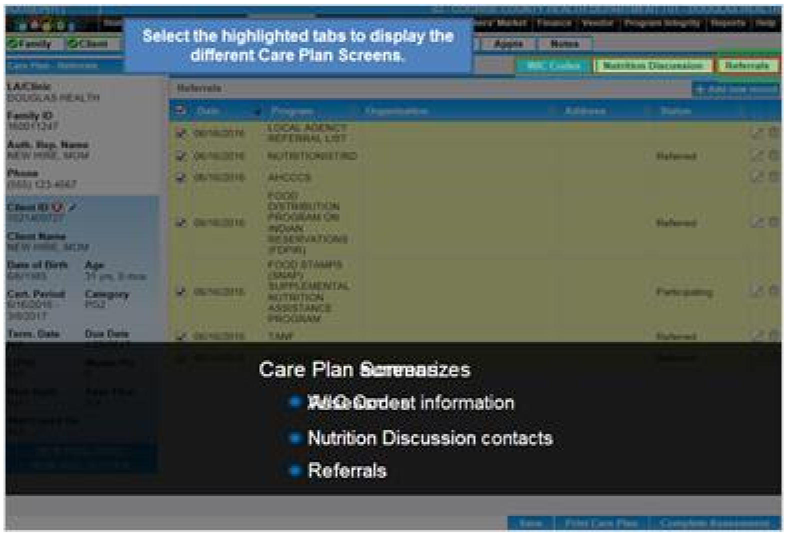
Notes:

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

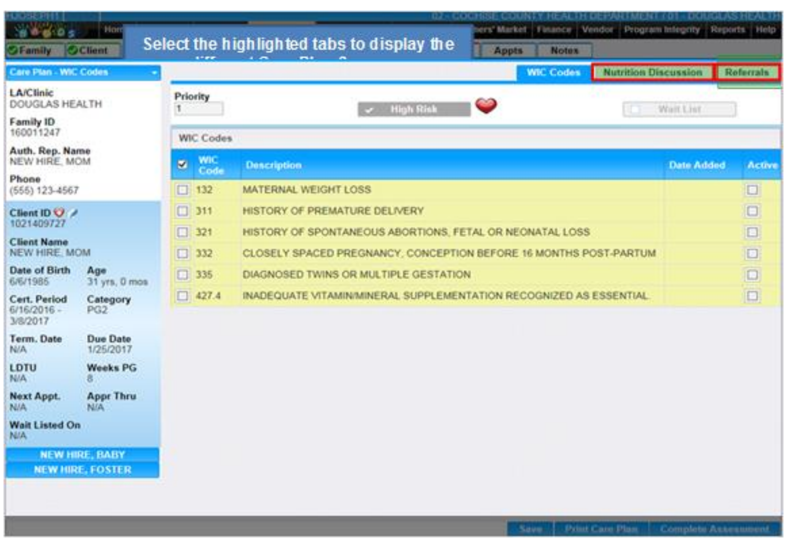


Notes:

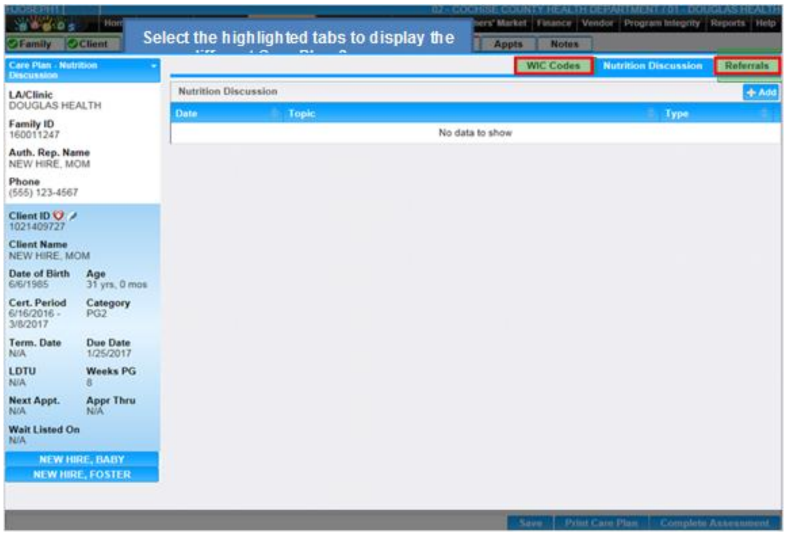
The Care Plan is an important part of the client's record. This screen, in combination with the Notes screen, gives a snapshot of the vital information contained within the client's record. It summarizes assessment, nutrition discussion, and referral information.

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.

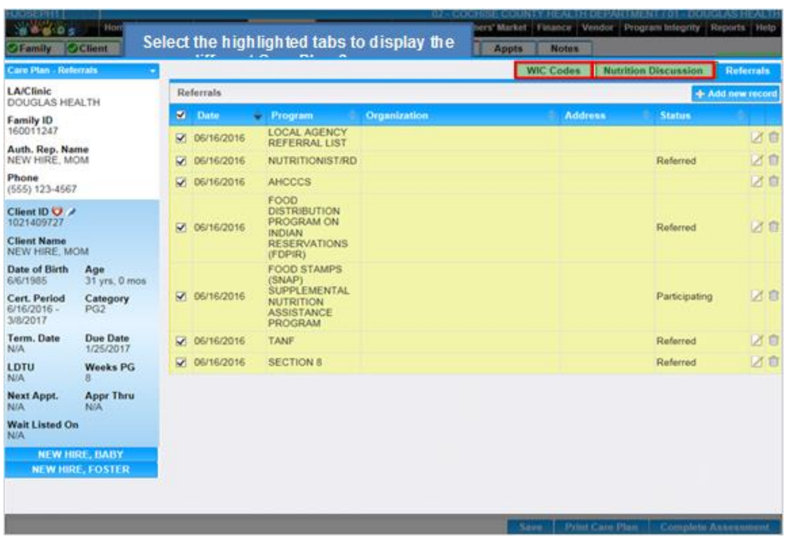
WIC CODES (SLIDE LAYER)



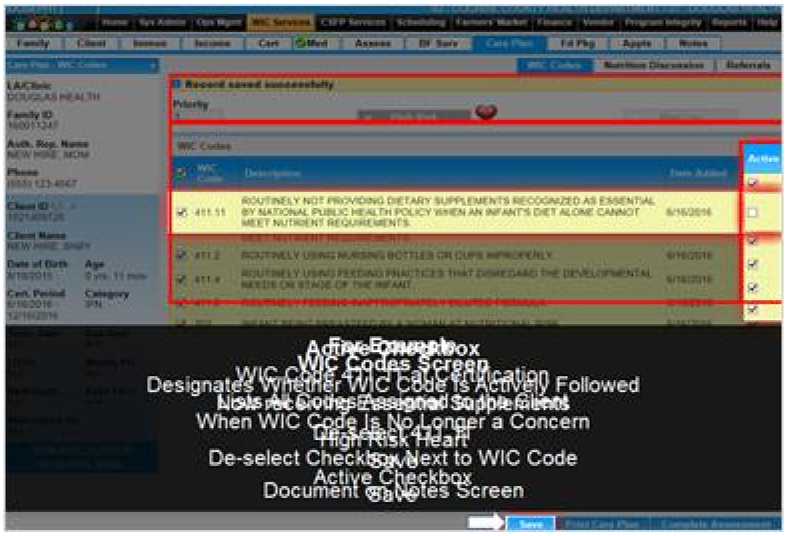
CP NUT DISCUSSION (SLIDE LAYER)



CP REFERRALS (SLIDE LAYER)



3.3 CARE PLAN - WIC CODES



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

Notes:

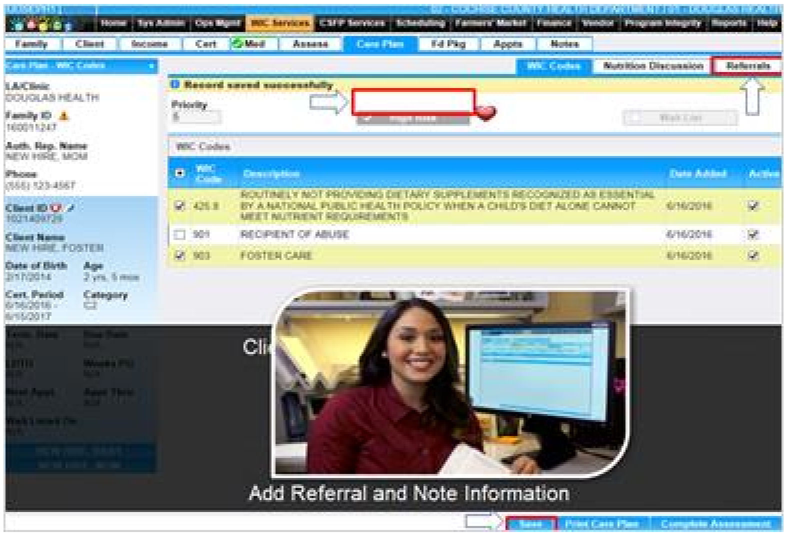
The High Risk Heart displays when a client has a WIC Code that is either High or Medium Risk. If the heart is red, the client needs to be seen by either a State-approved Nutritionist or Registered Dietitian (RD).

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

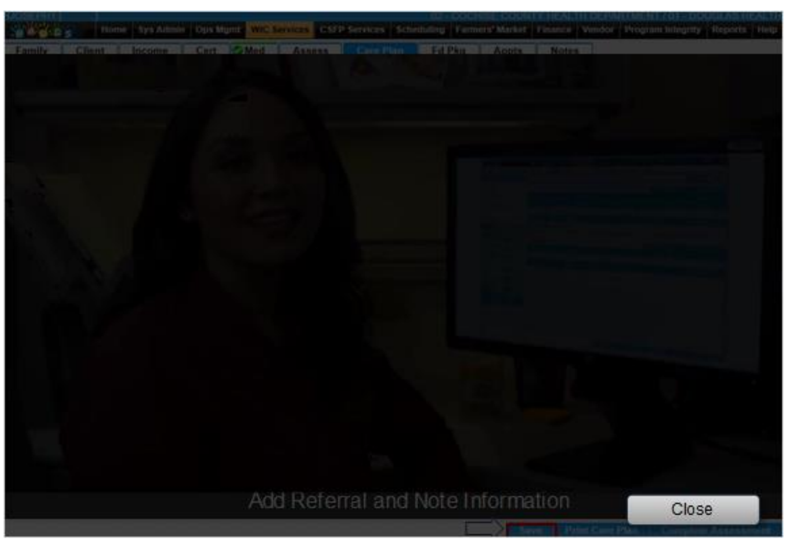


Notes:

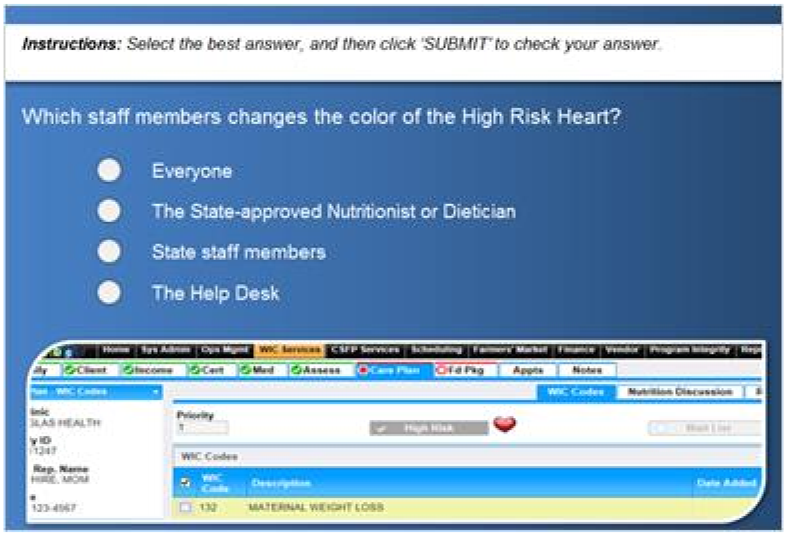
There are times when a client needs to see a State-approved Nutritionist or RD, even if the system has not marked them as High Risk. When this happens, select the High Risk checkbox on the WIC Codes screen, then select the Save button. Add the referral on the Referrals screen, and make sure to record 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.

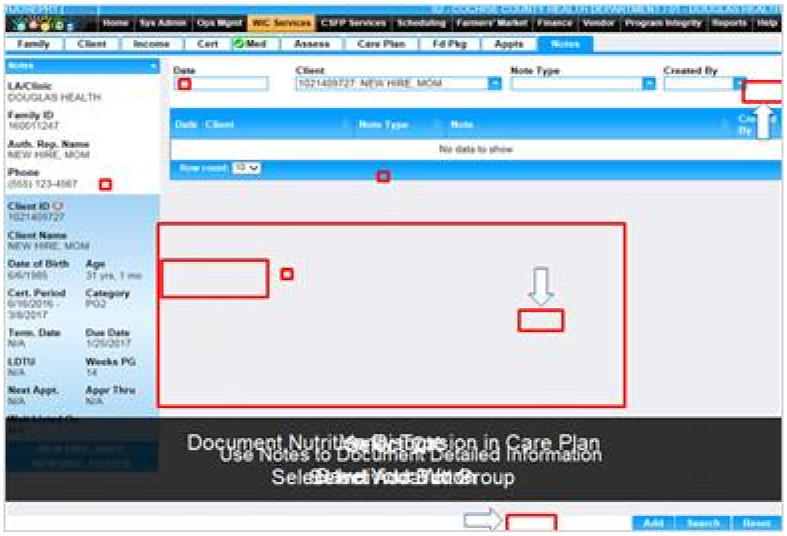
VIDEO EXAMPLE (SLIDE LAYER)



3.6 SELF CHECK - HIGH RISK HEART



3.7 CARE PLAN - NUTRITION DISCUSSION



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.

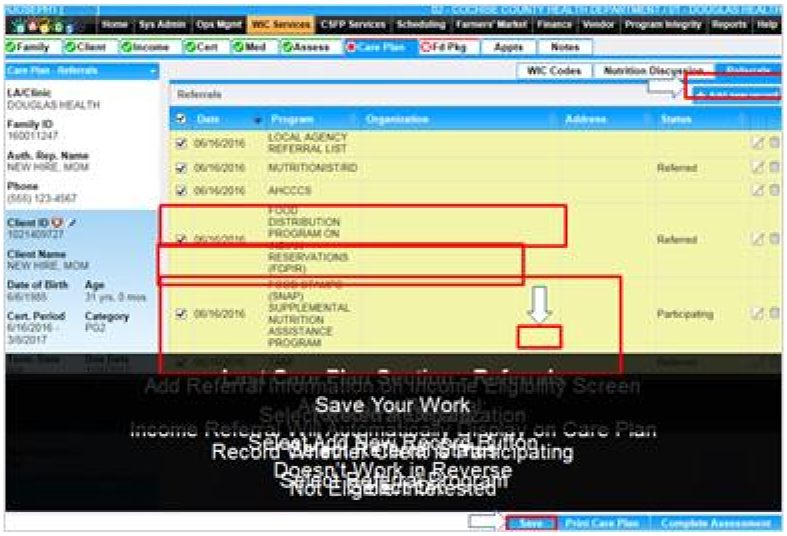
Use the Nutrition Discussion portion of the Care Plan to document which kind of nutrition contact, or discussion, you've completed.

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



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.

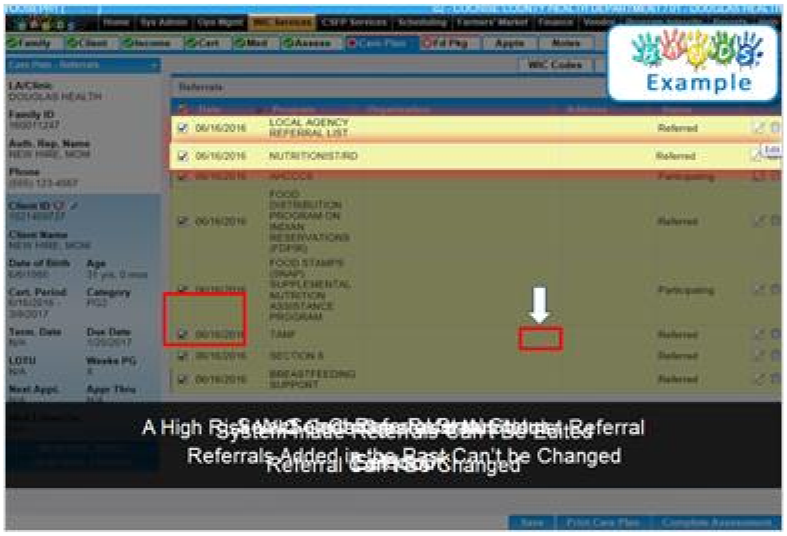
To make this process faster add referral information on the Income Eligibility screen. Referrals documented on the Income screen will automatically display on the Referrals screen. However, this doesn't work in reverse; making changes to the Referrals screen won't update the Adjunctive Eligibility Grid.

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



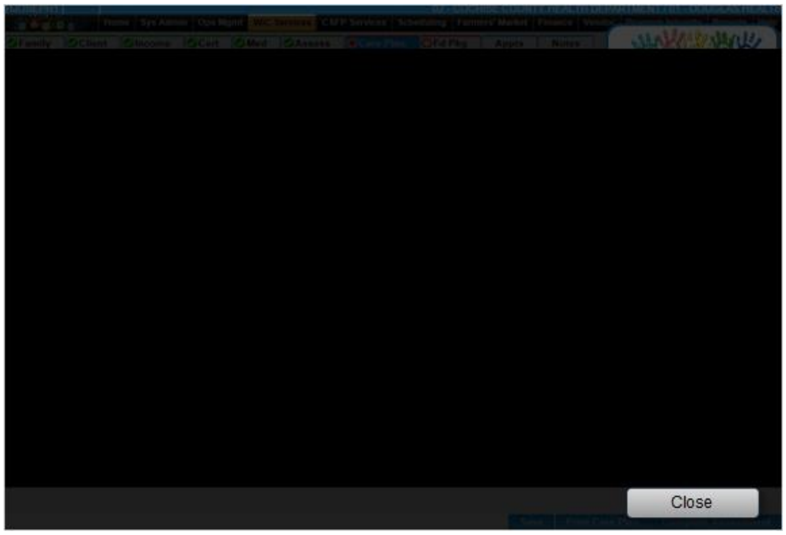
Notes:

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.

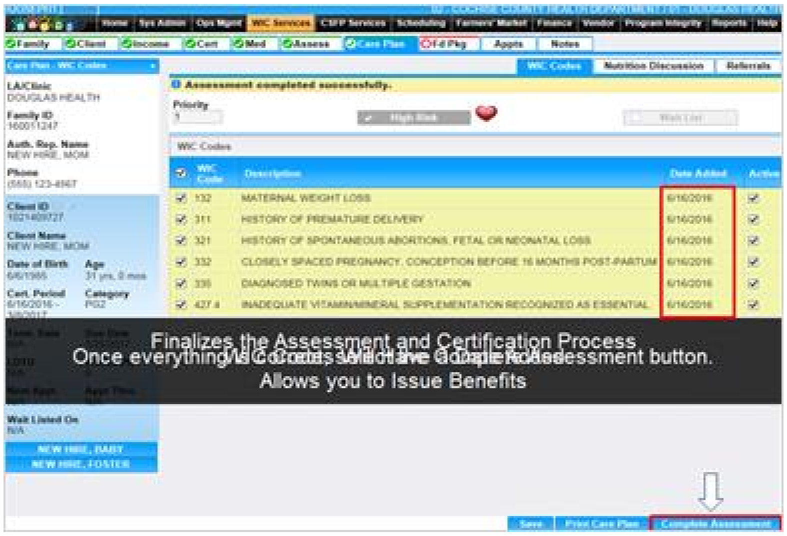
Some referrals are made by the system and can't be edited. In addition, referrals added in the past can't be changed. For example, a High Risk WIC Code automatically creates a Nutritionist referral. This referral can't be changed on the Referrals screen.

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

VIDEO EXAMPLE (SLIDE LAYER)



3.10 CARE PLAN - COMPLETE ASSESSMENT



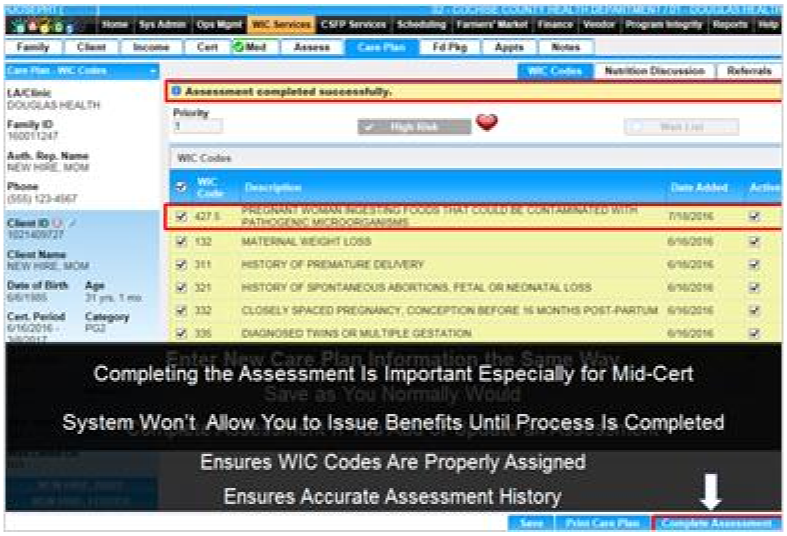
Notes:

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



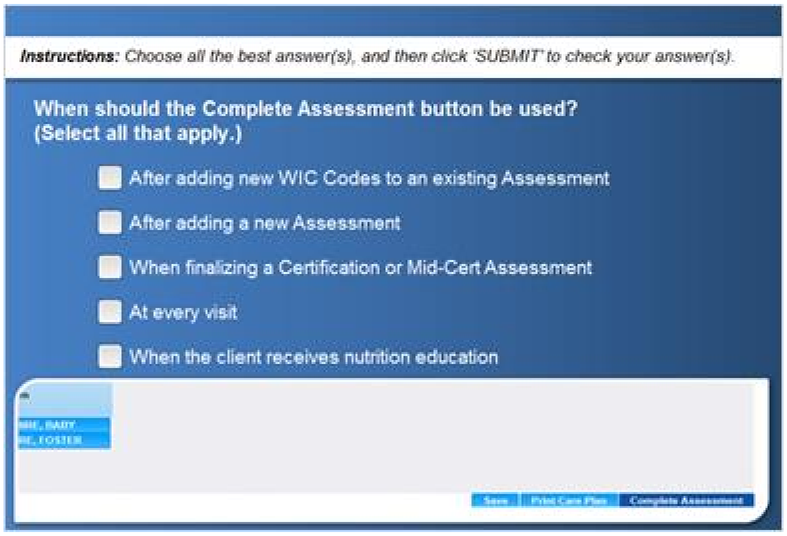
Notes:

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



3.13 INTRODUCTION TO NOTES

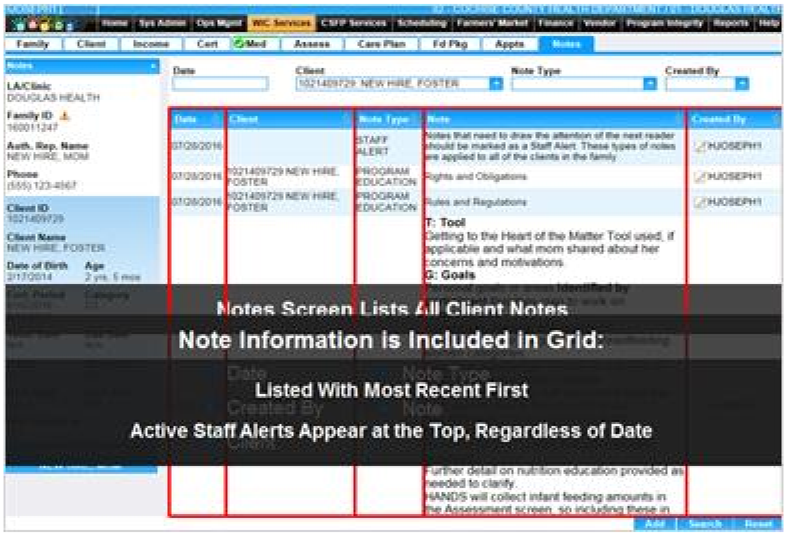
Notes:

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

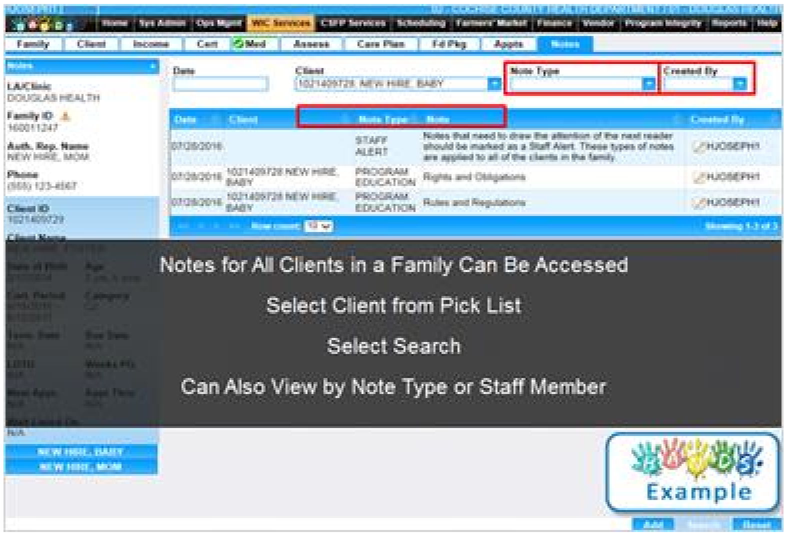


Notes:

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



Notes:

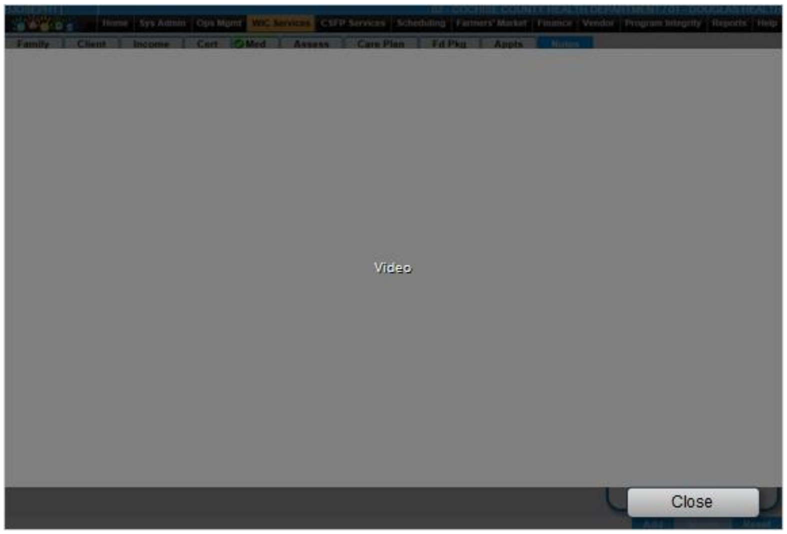
The notes for all of the clients in a family can be accessed using the same screen. To access another family member's notes, first select the client from the Client pick list.

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

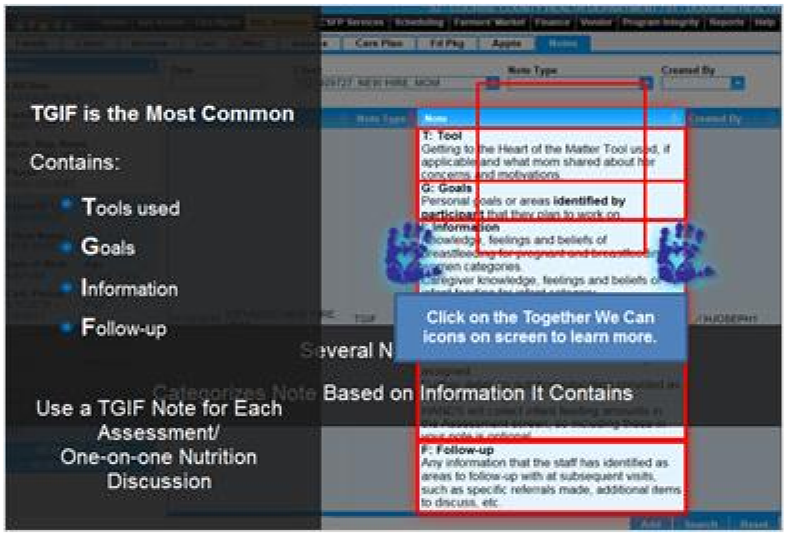
Notes can also be viewed by Note Type, using the Note Type pick list, or the staff member who created the note, using the Created By pick list.

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

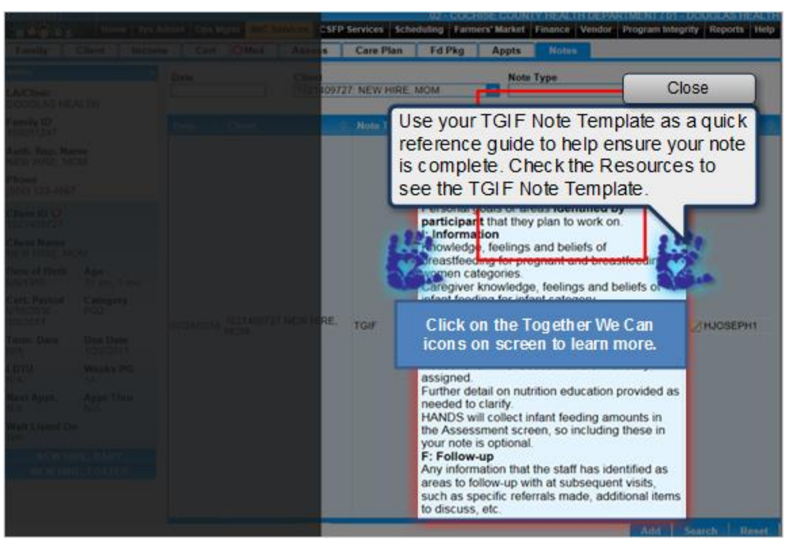


Notes:

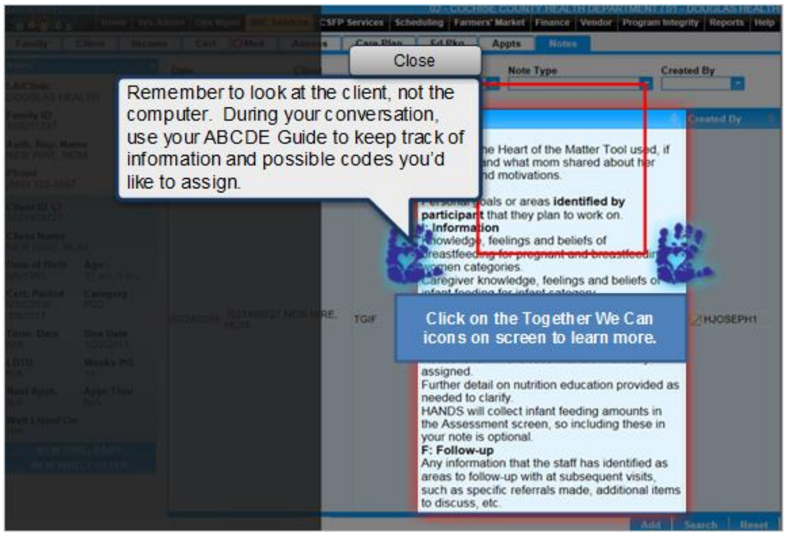
There are several Note Types in HANDS, and they may change from time to time. Selecting a Note Type categorizes the note based on the kind of information it contains.

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.

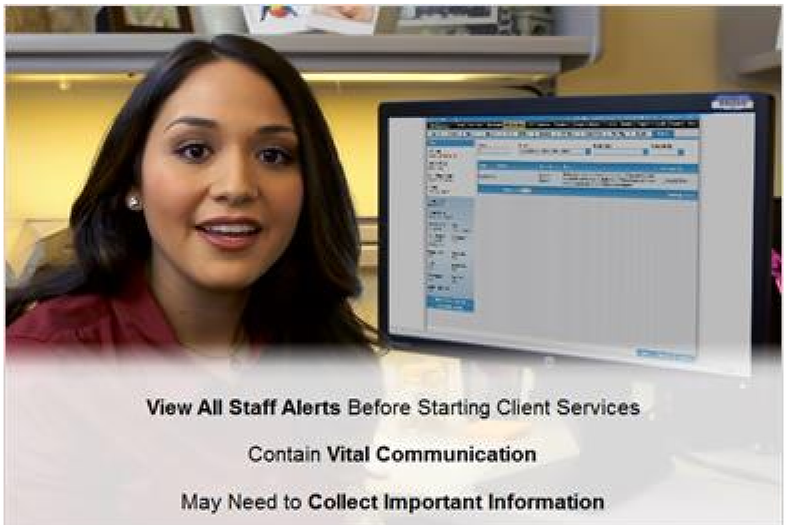
TOGETHER WE CAN 1 (SLIDE LAYER)



TOGETHER WE CAN 2 (SLIDE LAYER)



3.17 NORES - STAFF ALERT



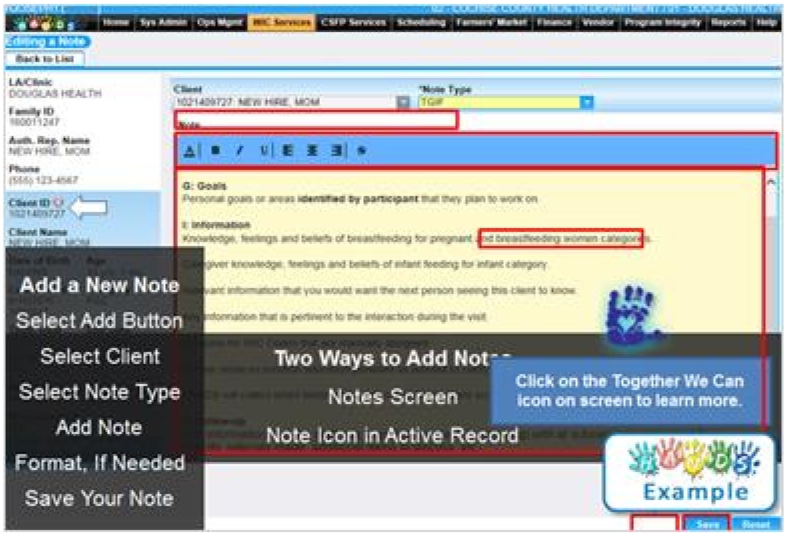
Notes:

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



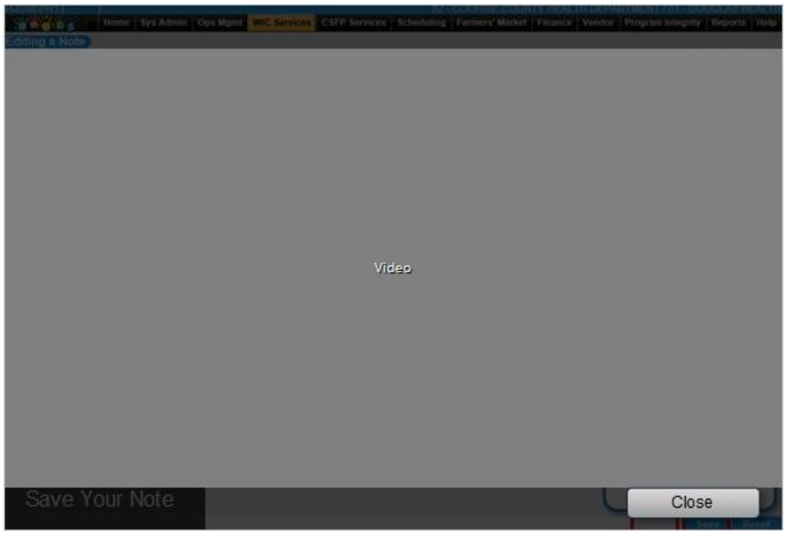
Notes:

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.

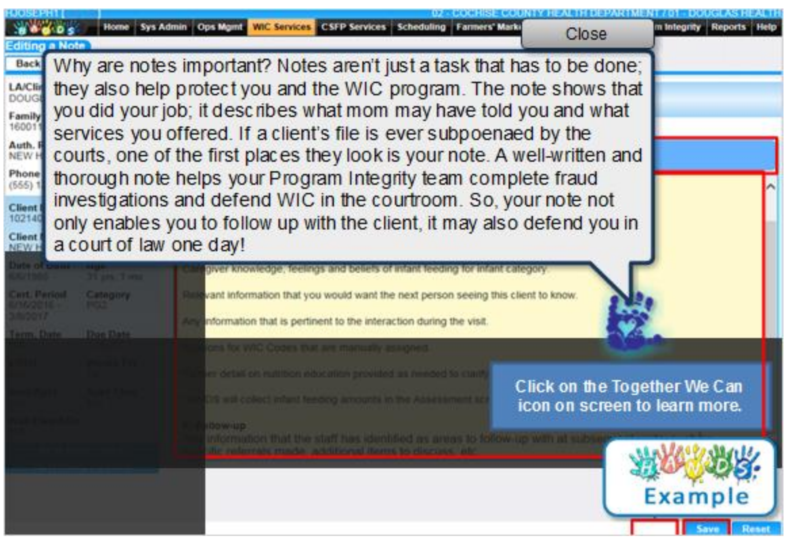
To add a new note using the Notes screen, select the Add button to open the Add screen. Select the client and the Note Type from the pick lists, and then add your note. Use the format menu to change the font style, or alignment of your note. Finish by selecting Save.

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

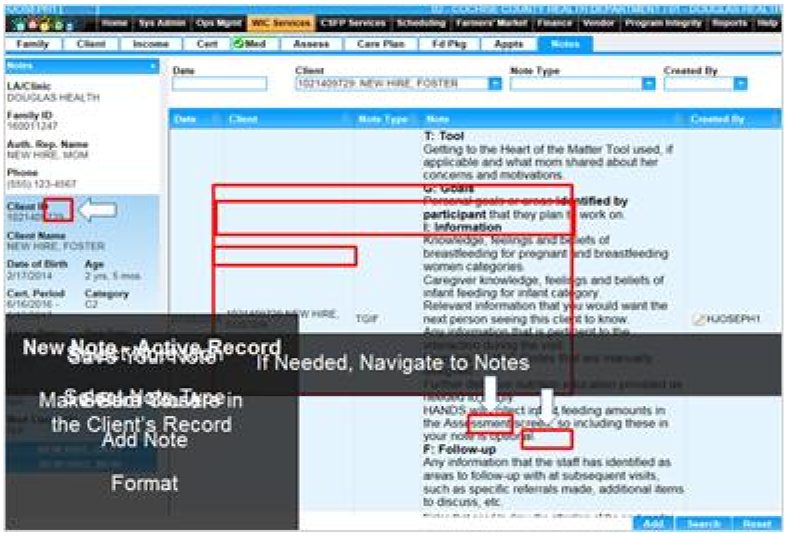
VIDEO EXAMPLE (SLIDE LAYER)



TOEGETHER WE CAN (SLIDE LAYER)



3.19 NOTES - ACTIVE RECORD



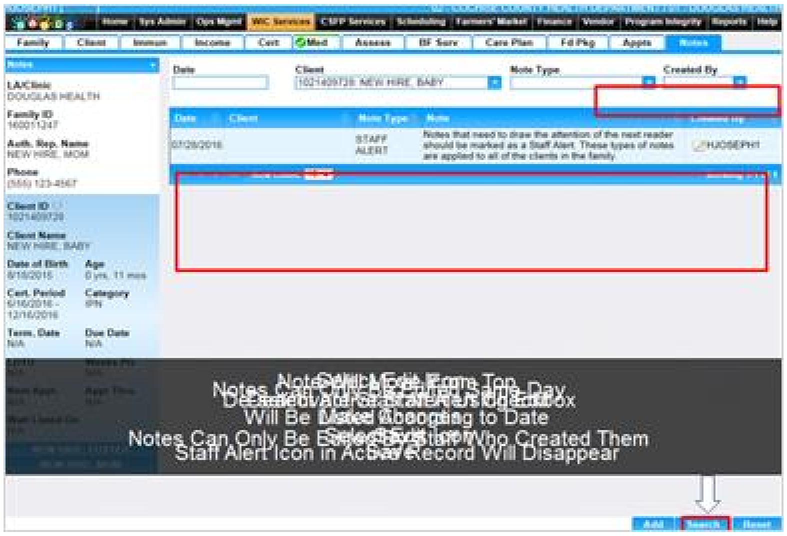
Notes:

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:

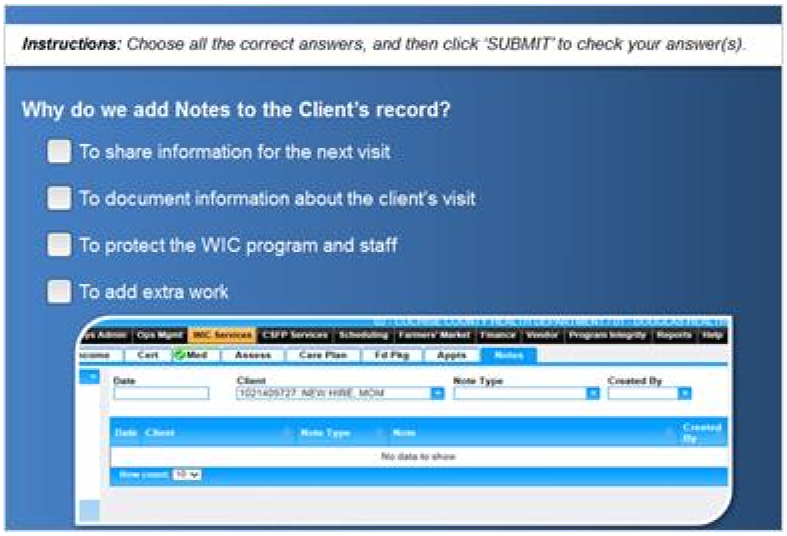
With the exception of deactivating a Staff Alert, notes can only be edited on the same day, by the staff member who created them. How do you edit a note you've created? First, select the Edit icon to open the edit window. Change the text, format, or Note Type. For this example, we will change the alignment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

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

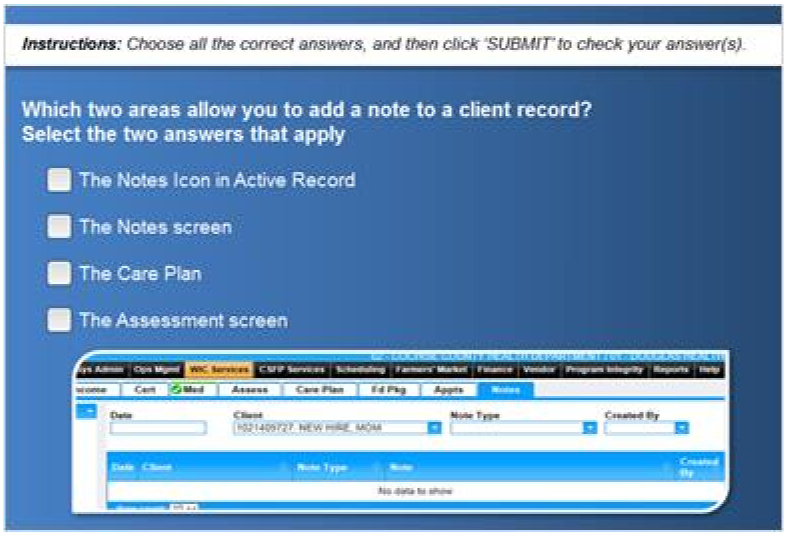
When a Staff Alert no longer applies, you can deactivate it using the edit process. Select the edit icon for the Staff Alert you wish to deactivate. De-select the Active Staff Alert checkbox, and select the Save button. This change is applied to all the clients in the family.

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.

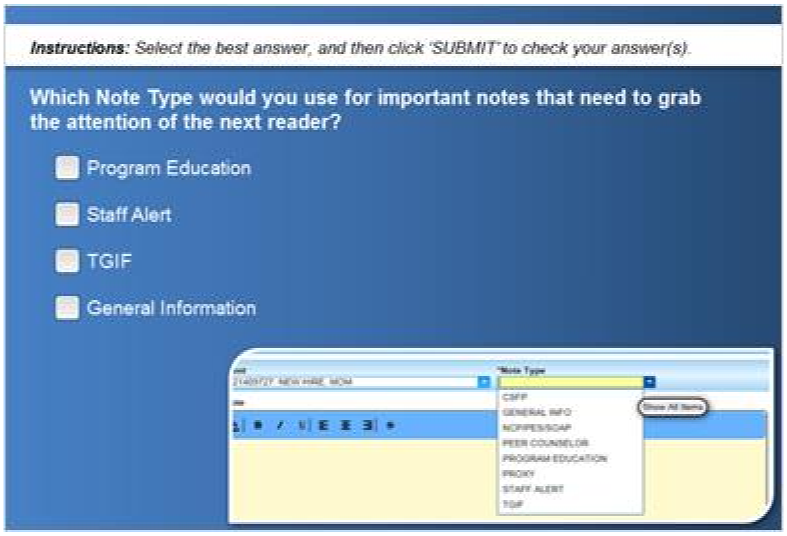
3.21 SELF CHECK - NOTES



3.22 SELF CHECK - ADD A NOTE



3.23 SELF CHECK - NOTE TYPES



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.

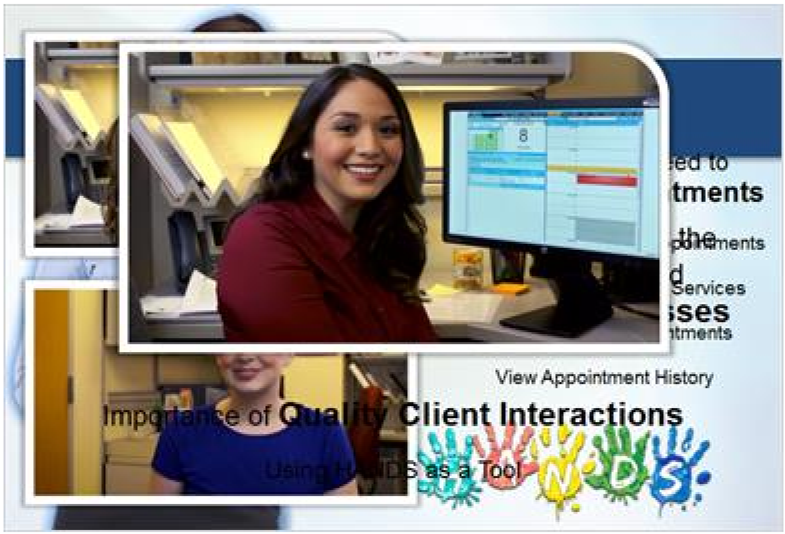
You learned about using the Care Plan screen to document and update WIC Codes, nutrition discussion and referral information.

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:

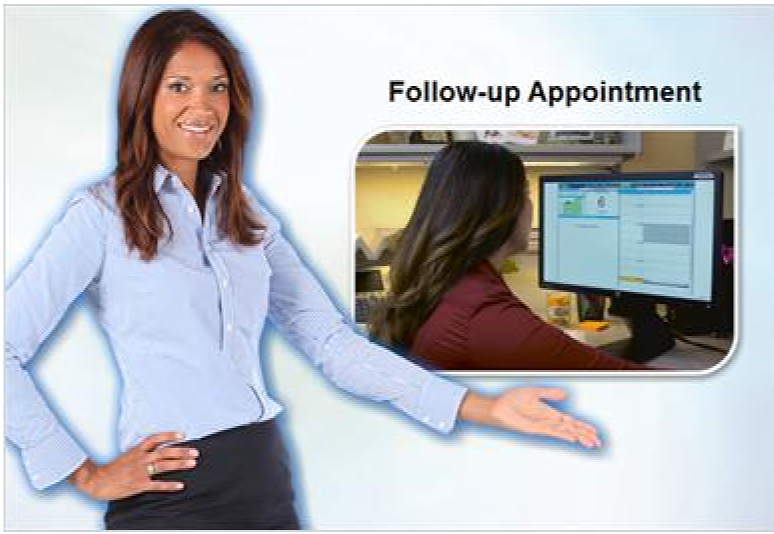
Now that you've learned about the certification and enrollment processes, it's time to learn about the screens you'll need to schedule appointments.

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.

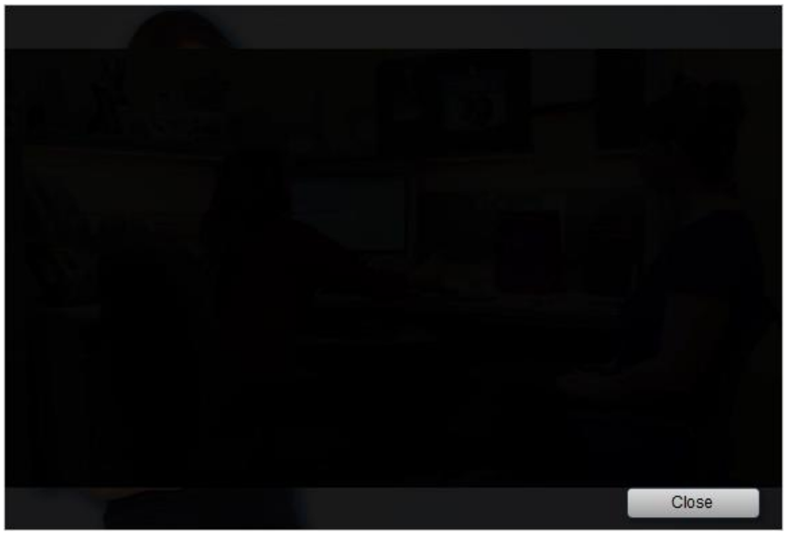
Lorena: Well we're all finished here. You can pick up your benefits at the front.

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

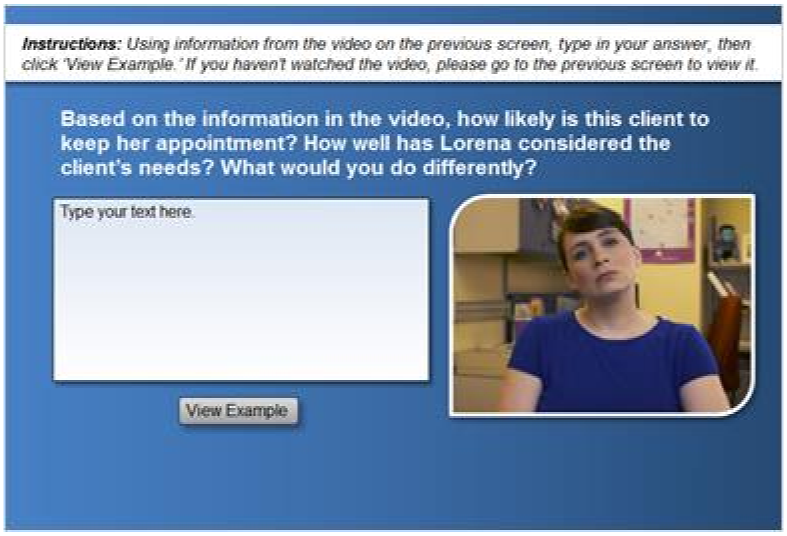
Lorena: Um, they're at the front where you came in. Naomi has them. Just ask someone up front for help.

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

VIDEO EXAMPLE (SLIDE LAYER)



4.3 VIDEO SCENARIO 1 - WHAT DO YOU THINK?



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?

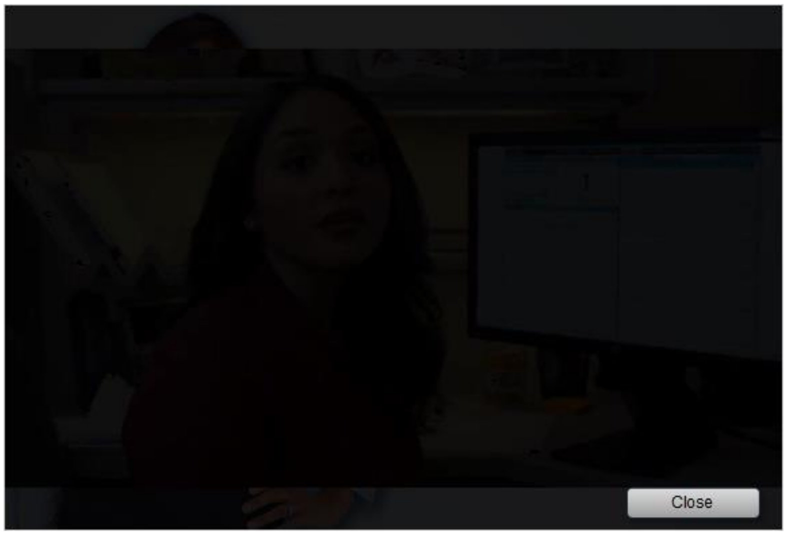
Yvonne: No, I can't think of anything. Thank you so much.

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.

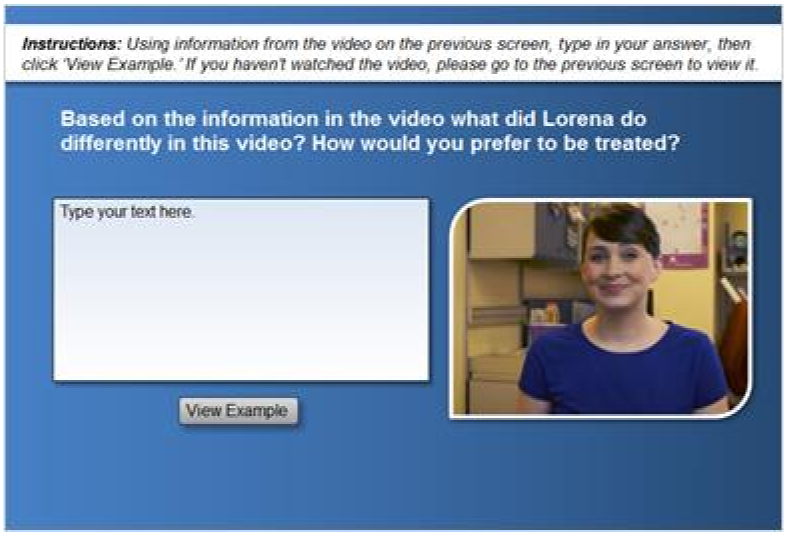
Yvonne: Oh, that would be great! Thank you so much for everything today!

Lorena: You're welcome.

VIDEO (SLIDE LAYER)



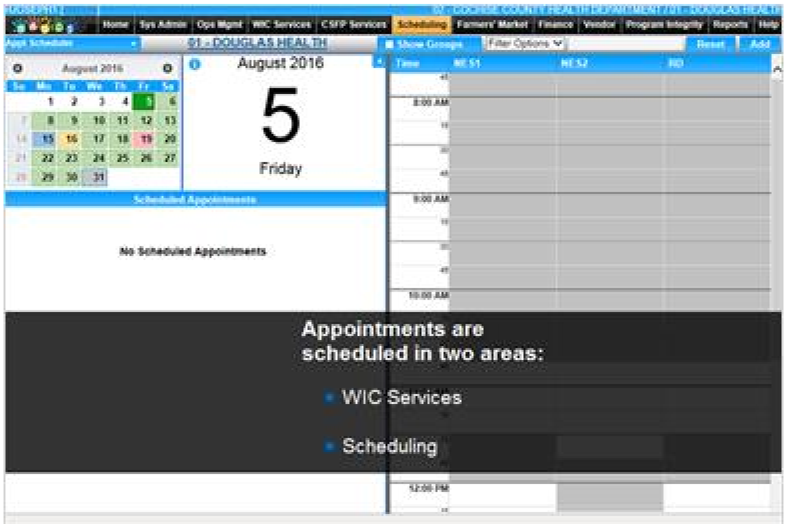
4.5 VIDEO SCENARIO 2 - WHAT DO YOU THINK?



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



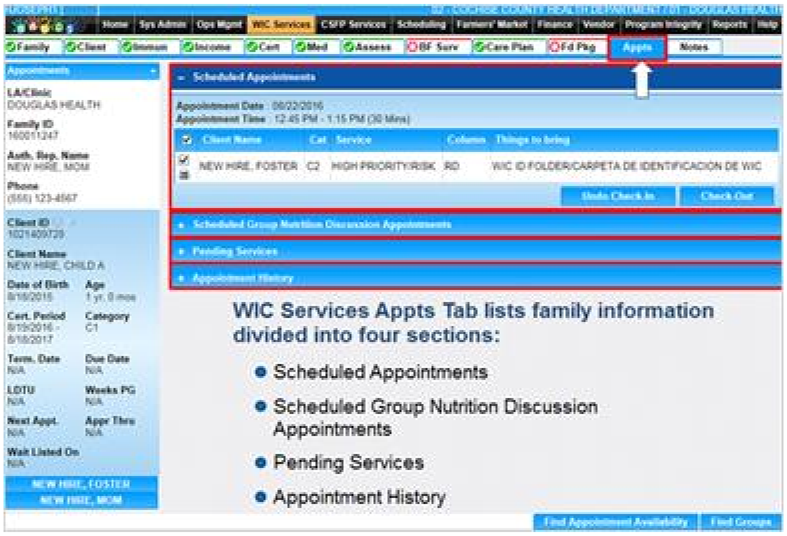
Notes:

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



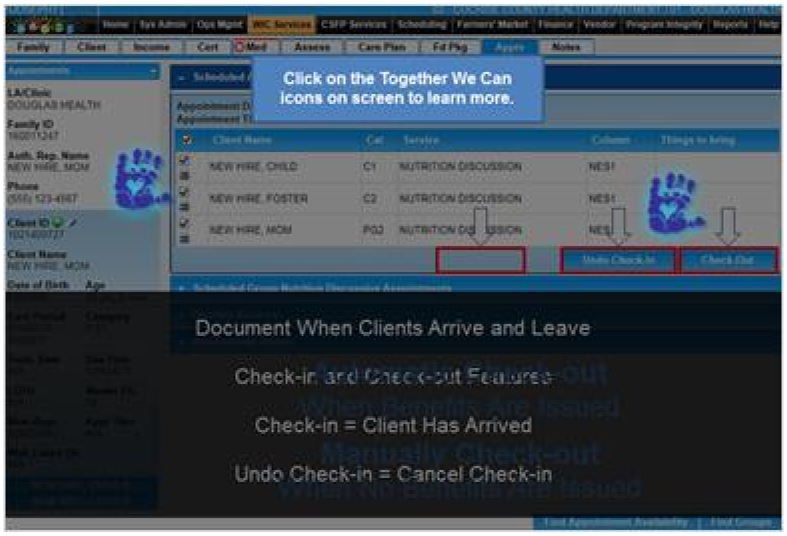
Notes:

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



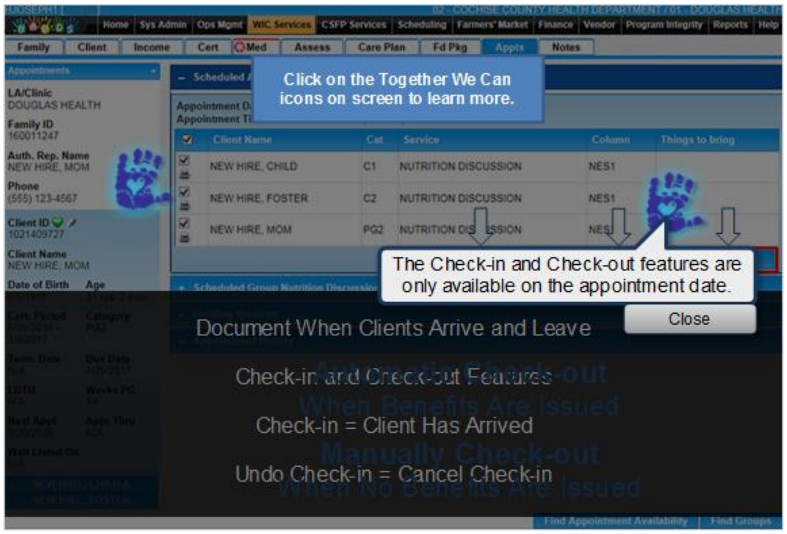
Notes:

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.

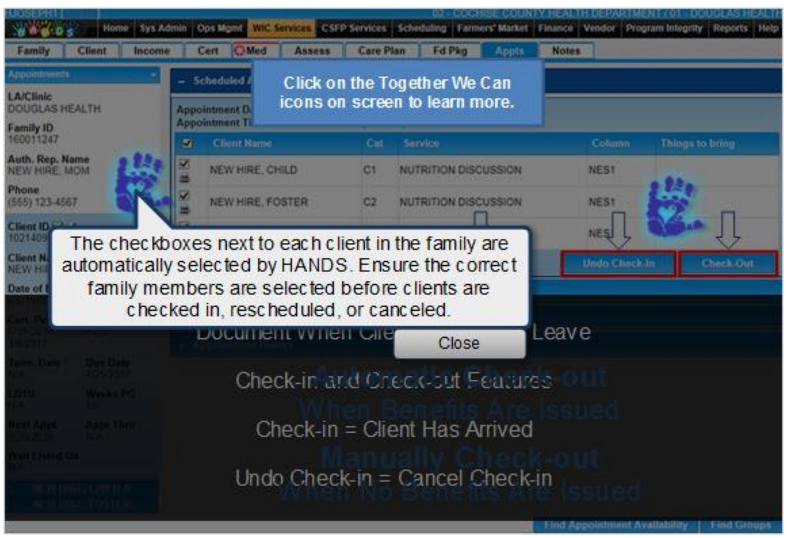
Document the time clients arrive and leave using the Check-in and Check-out features. Select the Check-In button to indicate that the client has arrived for his or her appointment. If the client is checked in by accident, select the Undo Check-In button to cancel the check-in.

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.

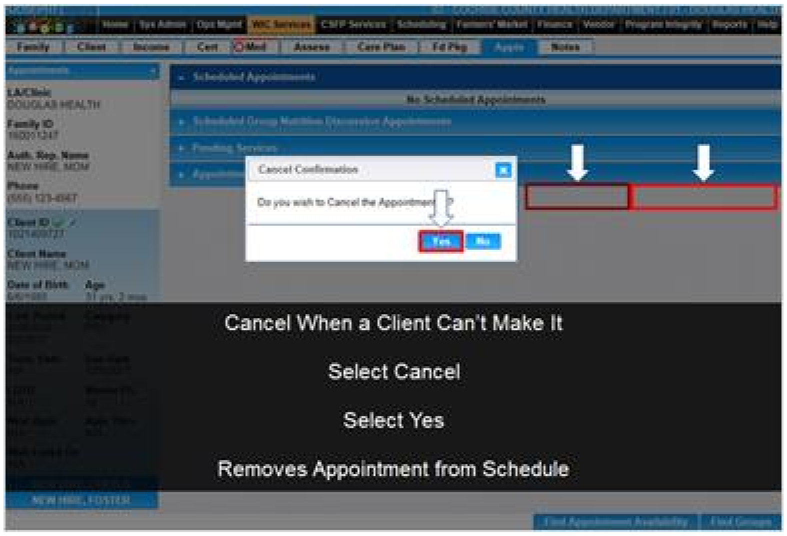
TOGETHER WE CAN (SLIDE LAYER)



TOGETHER WE CAN 2 (SLIDE LAYER)



4.9 SCHEDULED APPOINTMENTS - RESCHEDULE AND CANCEL

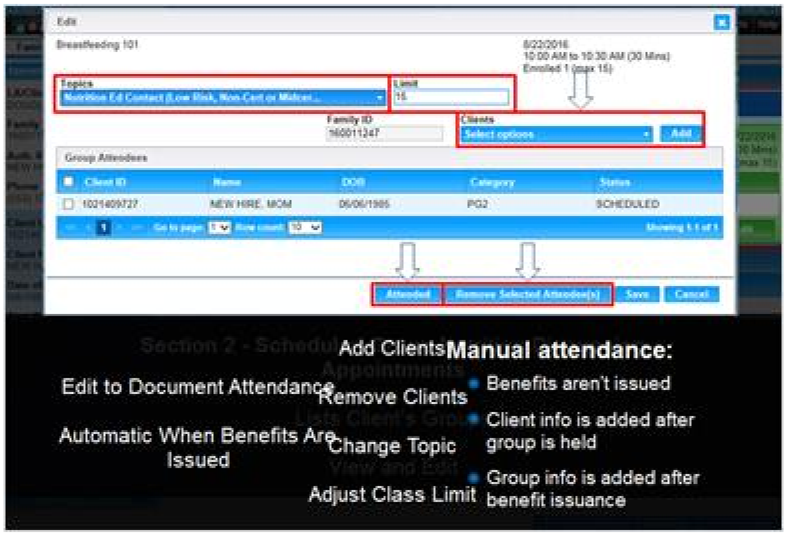


Notes:

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



Notes:

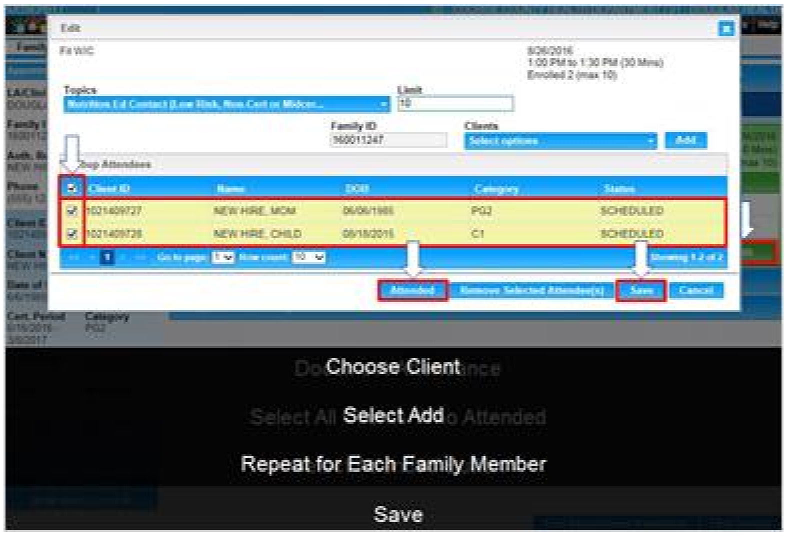
The second section is Scheduled Group Nutrition Discussion Appointments. This section lists the groups in which your client has enrolled. You'll view and edit groups in this section.

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



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.

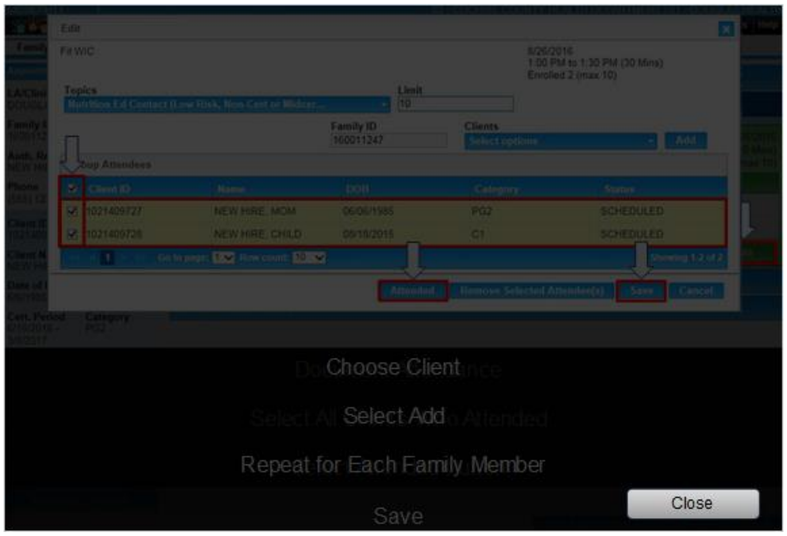
If you wish to select all of the clients within a group, select the checkbox in the header of the Group Attendees grid. Then select the Remove Selected Attendee(s) button.

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

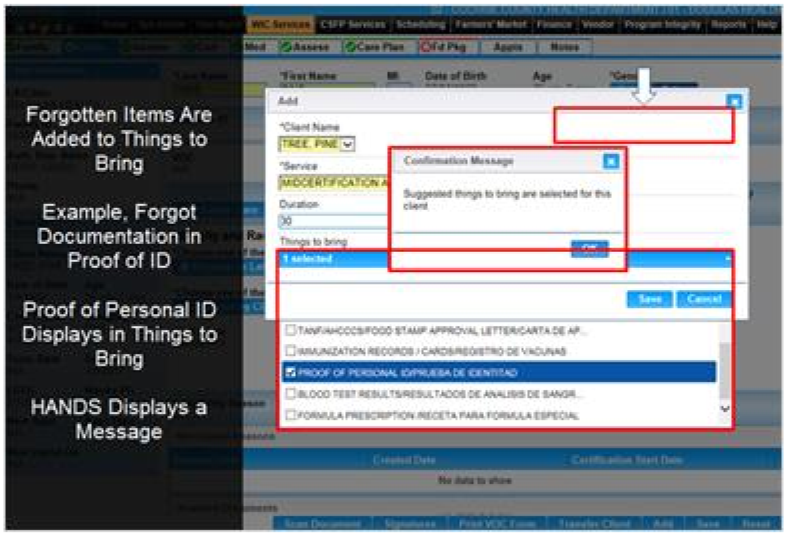
The process to document client attendance is similar to removing a client from the group. Start by selecting the Edit button. Find the client or clients that were present during the group on the list of Group Attendees. Then select the checkbox next to each Client ID, and then select the Attended button.

Select the Save button when you're finished.

VIDEO EXAMPLE (SLIDE LAYER)



4.12 APPOINTMENTS - PENDING SERVICES



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.

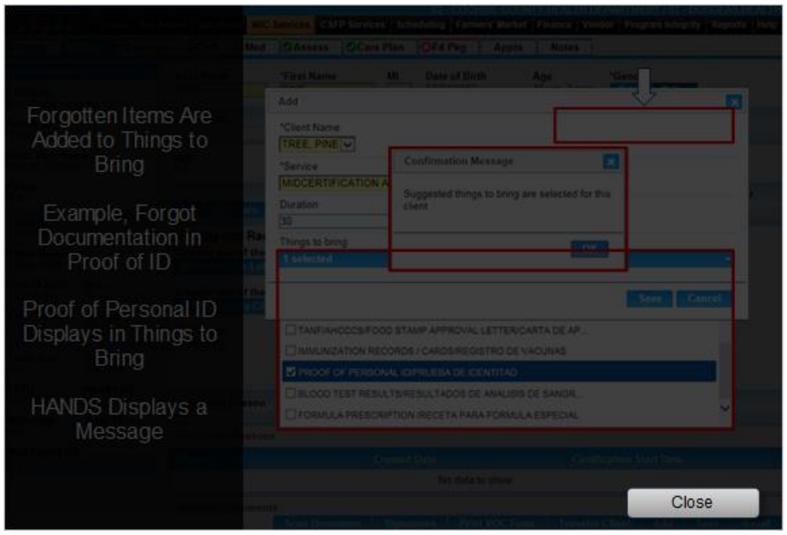
Select the Add button to document a Pending Service. Select the client from the Client Name pick list, and then select the type of visit the client needs from the Service pick list. Next, review the items in the Things to Bring pick list and edit the list if needed. Select the Save button when you're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

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

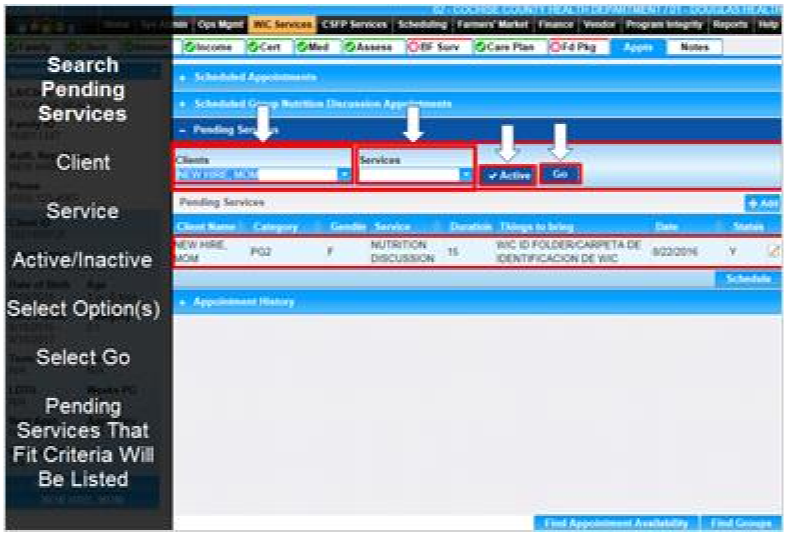
If the client has forgotten any items and these items are documented in HANDS, they will automatically be added to Things to Bring.

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)



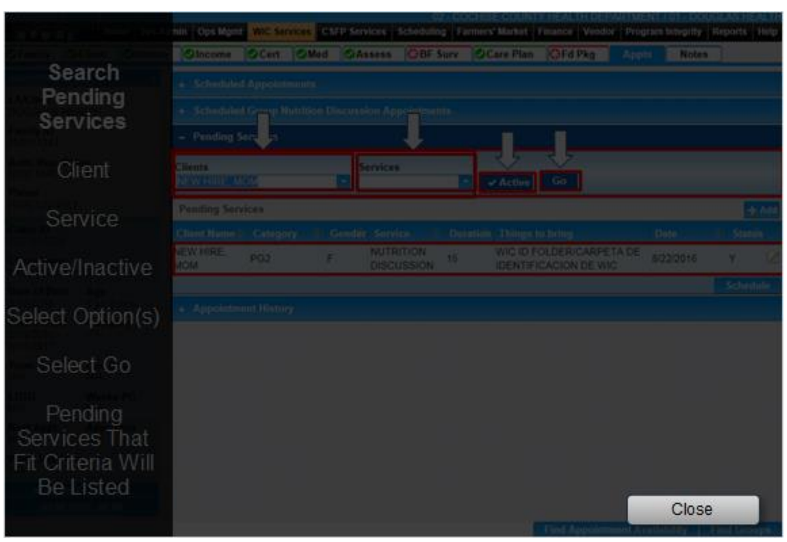
4.13 PENDING SERVICES - SEARCH



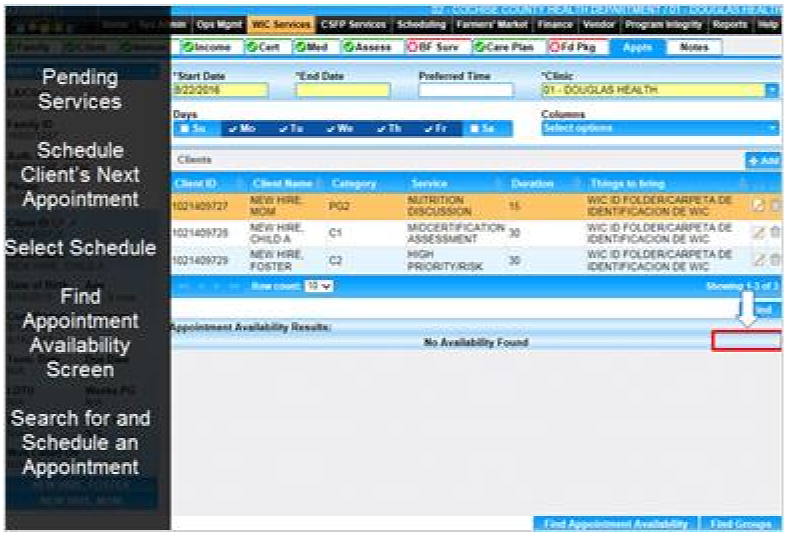
Notes:

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)



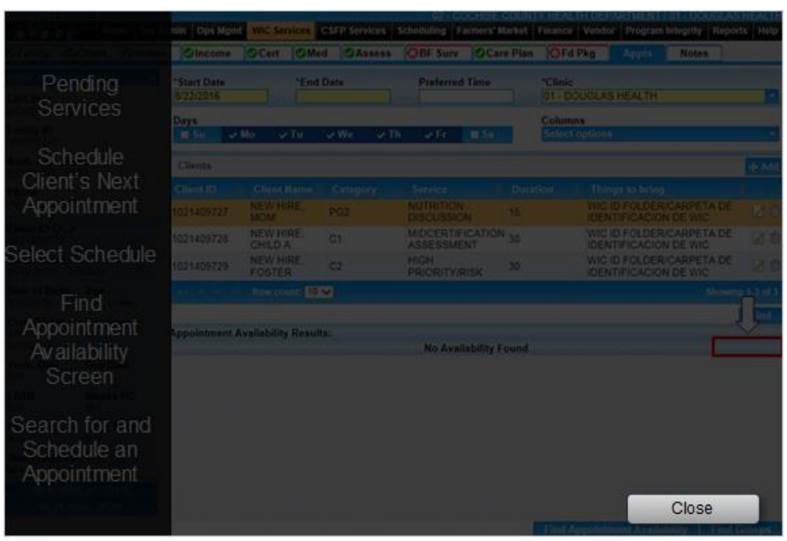
4.14 PENDING SERVICES - SCHEDULE



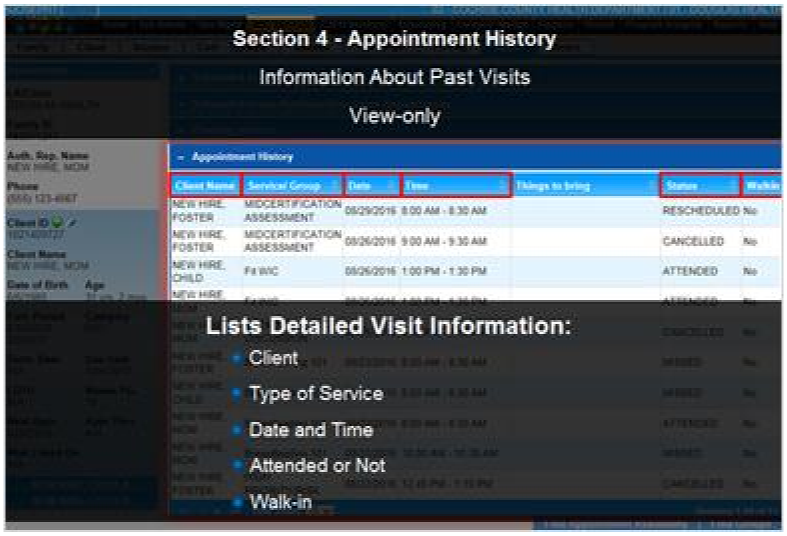
Notes:

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

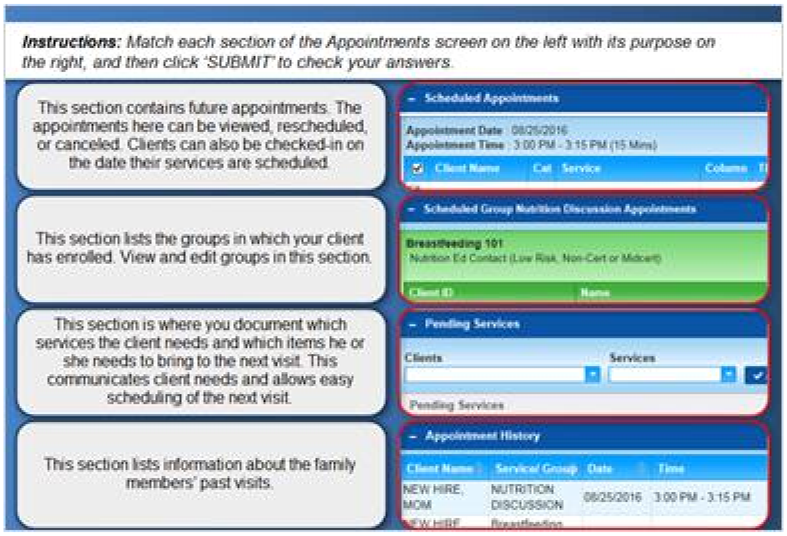


Notes:

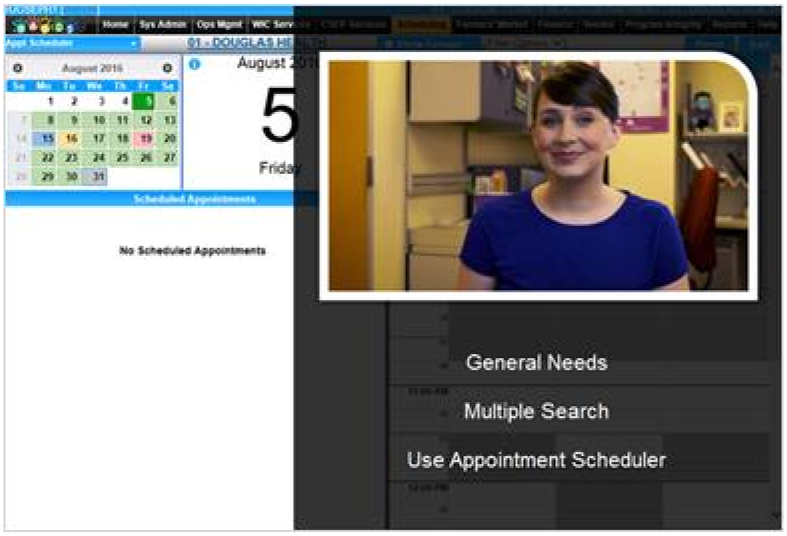
The fourth and final section on the Appointments screen is Appointment History. The Appointment History section lists information about the family members' past visits. This section is view-only and can't be changed.

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



4.17 APPOINTMENTS - SCHEDULING VISITS



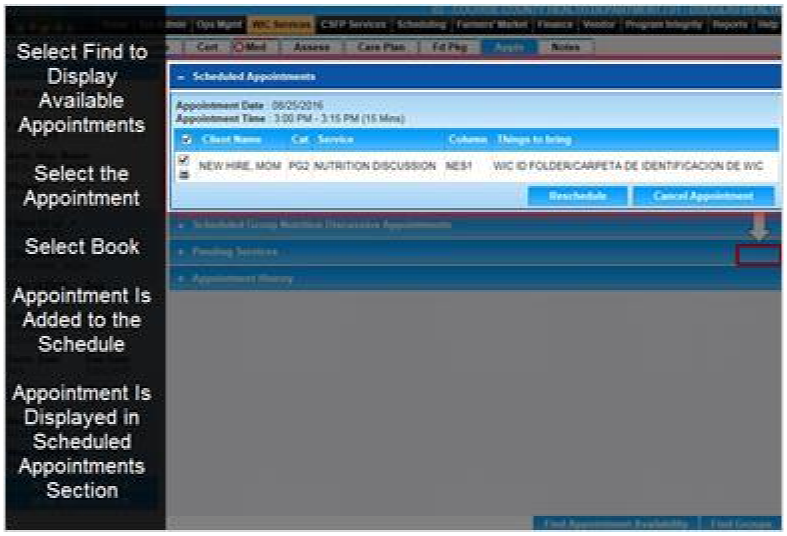
Notes:

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.

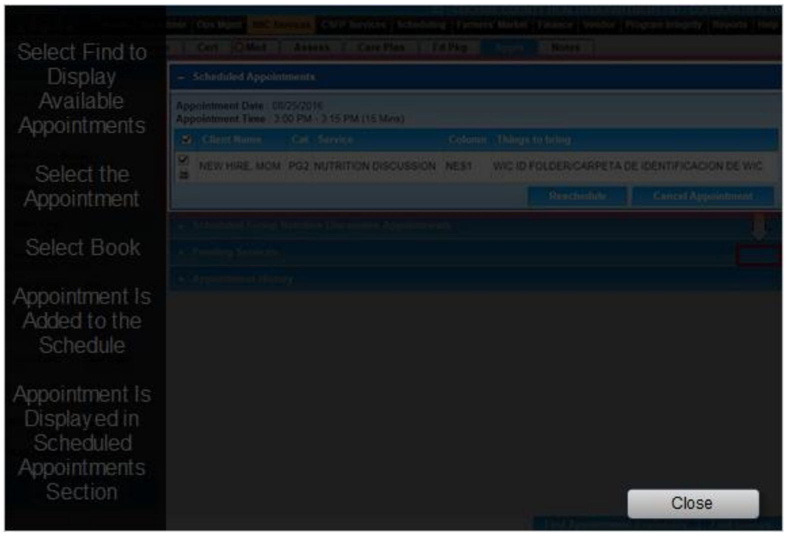
When you're finished, select the OK button to return to the main screen. Repeat this process for each client within the family needing an appointment.

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

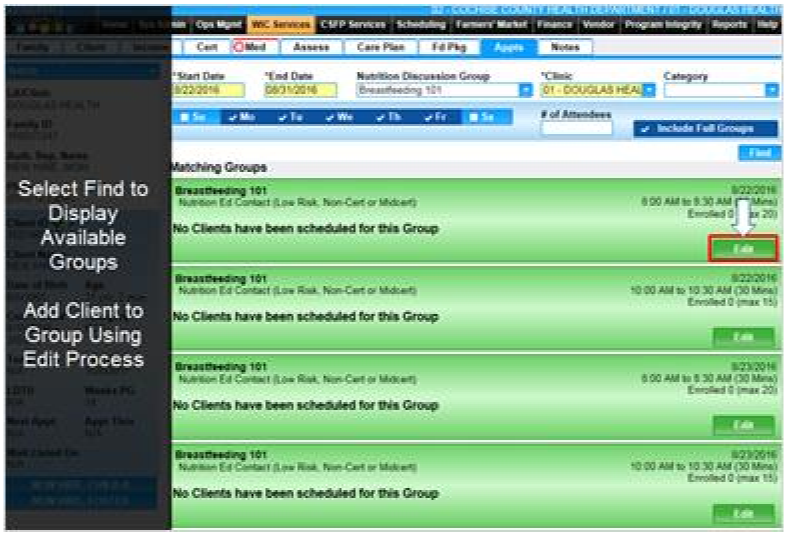
After the client has decided on an appointment that works, select the circle to the left of the client's name to schedule it.

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:

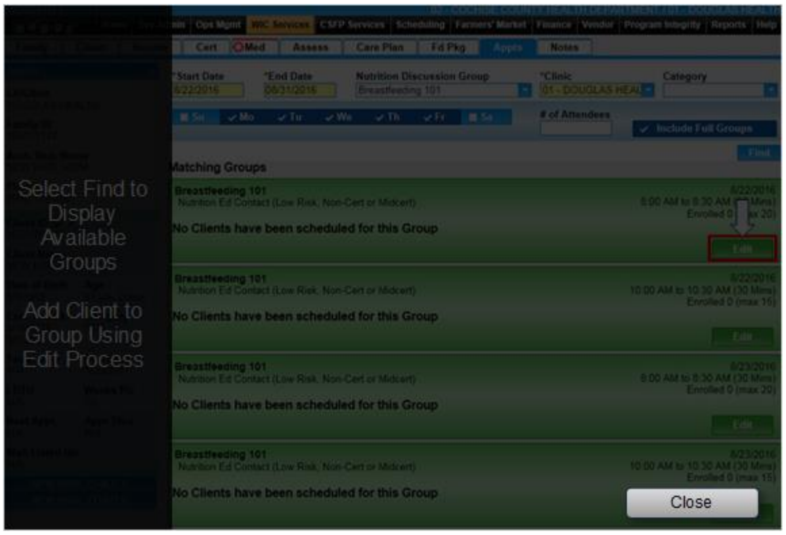
What if your client is interested in attending a group? Select the Find Groups button. The Groups Availability Search screen will display.

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.

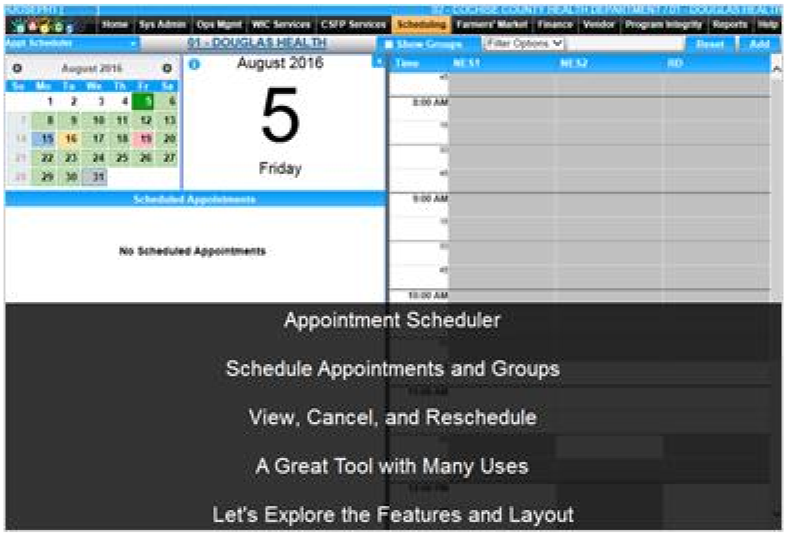
After search criteria have been entered select the Find button to display the available groups.

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



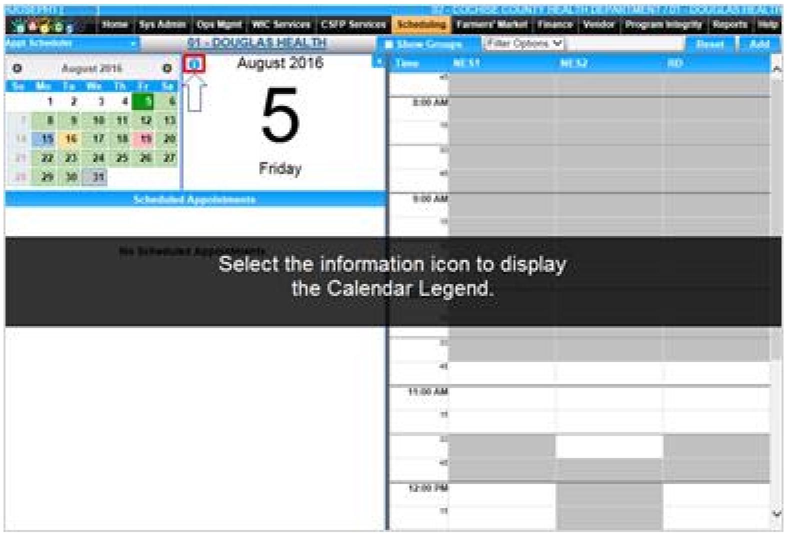
Notes:

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.

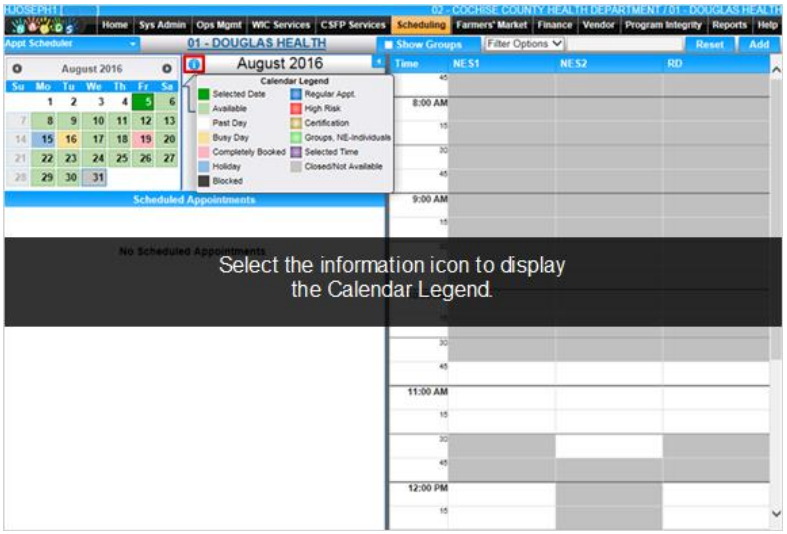
Color is also used to indicate when appointments are available. Days with a lot of appointment availability are light green, while days with only a few available appointments are yellow.

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.

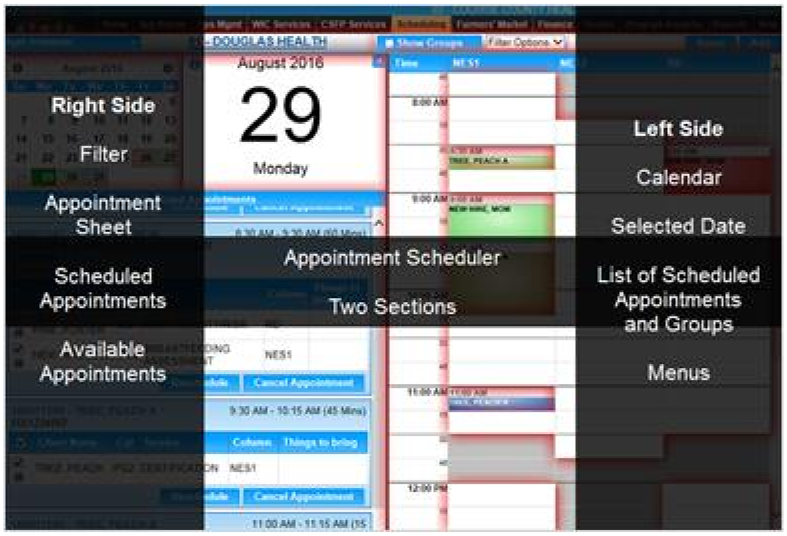
Now you try it. Select the information icon to display the Calendar Legend.

COLOR CODE (SLIDE LAYER)



4.22 SELF-CHECK - COLOR CODING

4.23 APPOINTMENT SCHEDULER - OVERVIEW



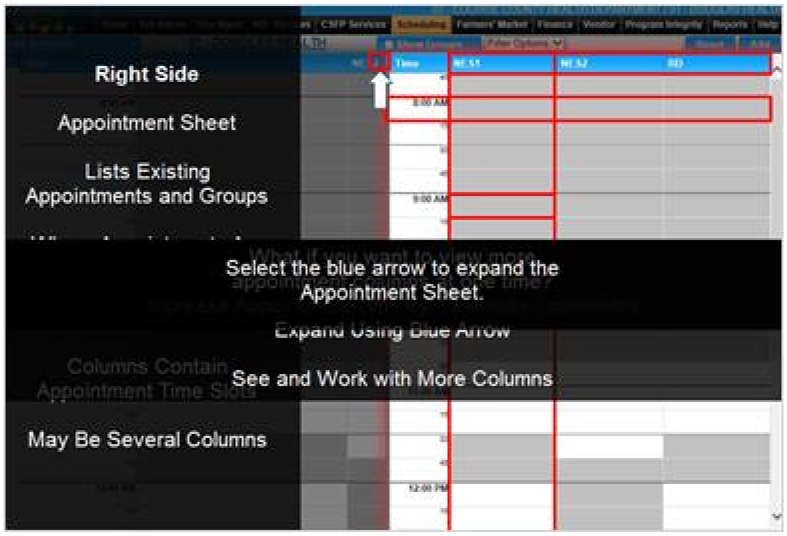
Notes:

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:

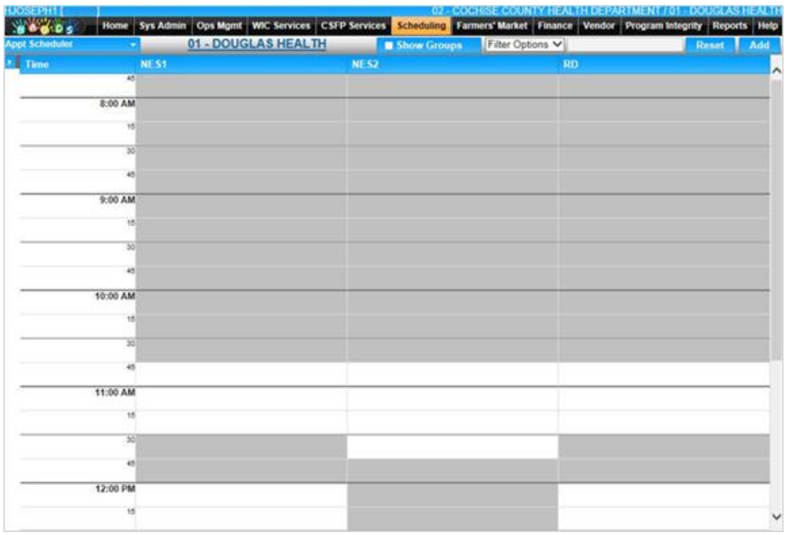
Let's start with the right side of the screen. The Appointment Sheet can be found here. The Appointment Sheet lists existing appointments and groups. This is also where appointments are scheduled.

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.

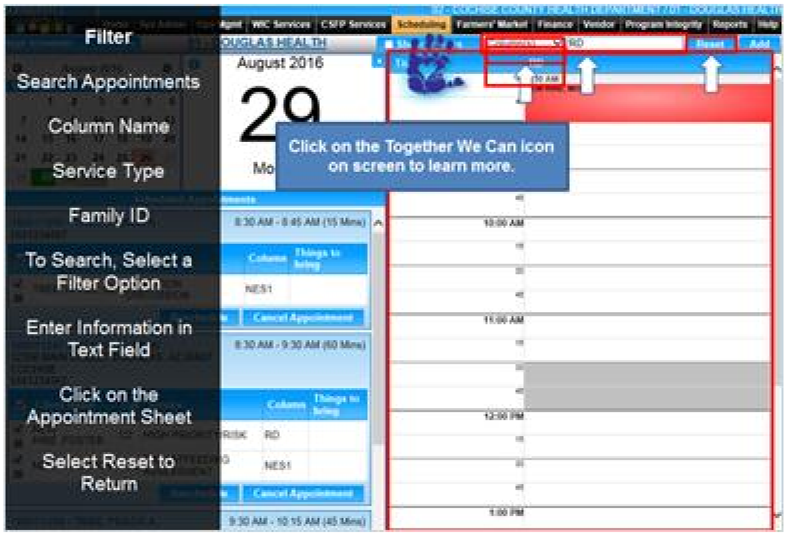
Notice that each time slot on the Appointment Sheet is 15 minutes. This is the shortest appointment time. Appointment time can be increased by fifteen minute increments. We will learn how to do this in a few minutes. What if you want to view more appointment columns at one time? Expand the Appointment 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)



4.25 APPOINTMENT SCHEDULER - FILTER



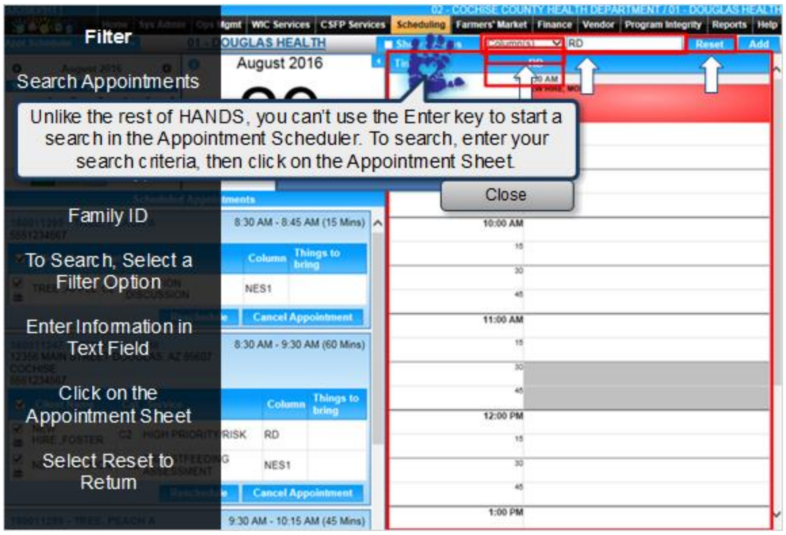
Notes:

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.

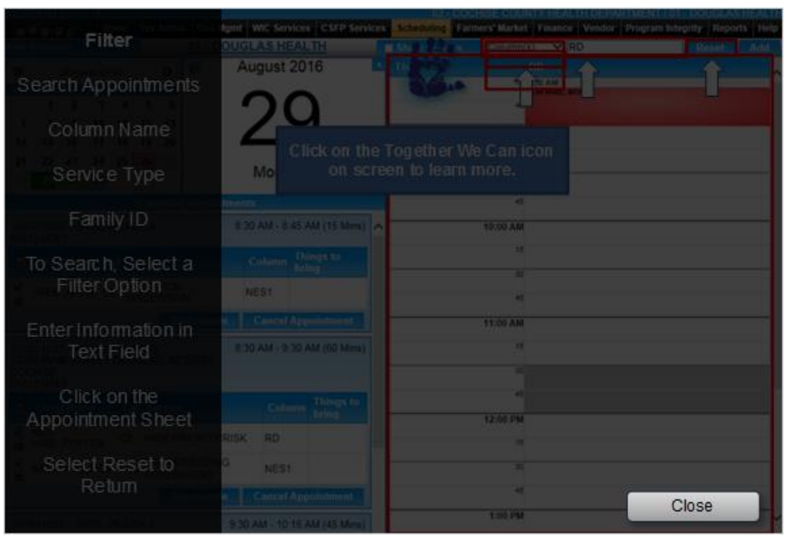
To search, select an item from the Filter Options pick list. Enter what you are looking for in the text field next to the pick list. For our example, we are looking for RD columns. After you've entered search information, click on the Appointment Sheet to display the search results.

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

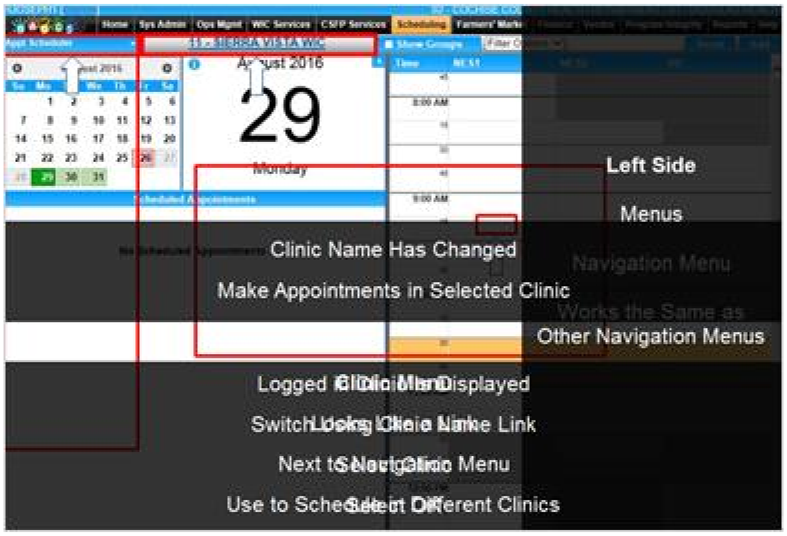
TOGETHER WE CAN (SLIDE LAYER)



VIDEO EXAMPLE (SLIDE LAYER)



4.26 APPOINTMENT SCHEDULER - MENUS



Notes:

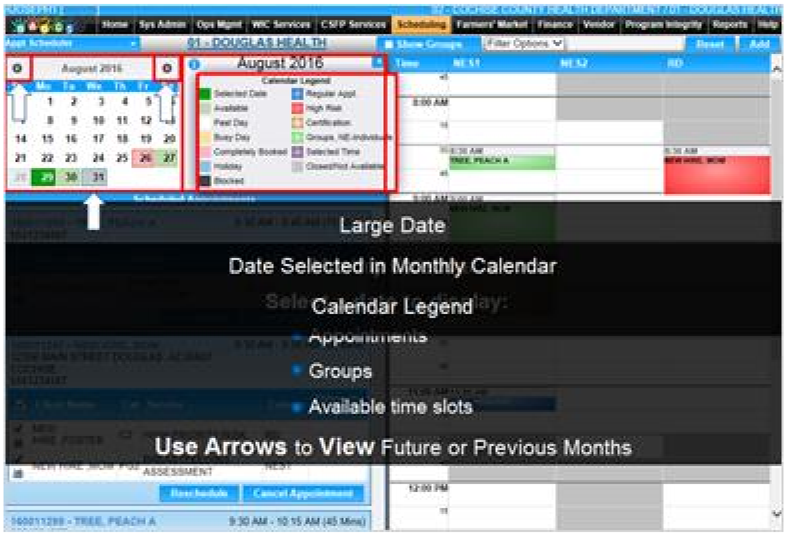
Now let's look at the left side of the screen. Notice the two menus in the top-left section of the screen. The first, in the upper-left corner of the screen, is the Navigation menu. It works the same as the other navigation menus you learned about in Module 1. Use this menu to navigate throughout the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



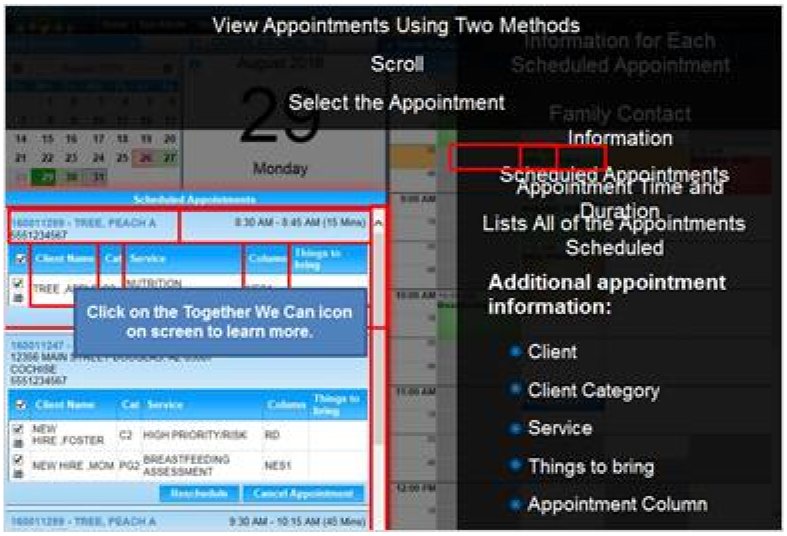
Notes:

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:

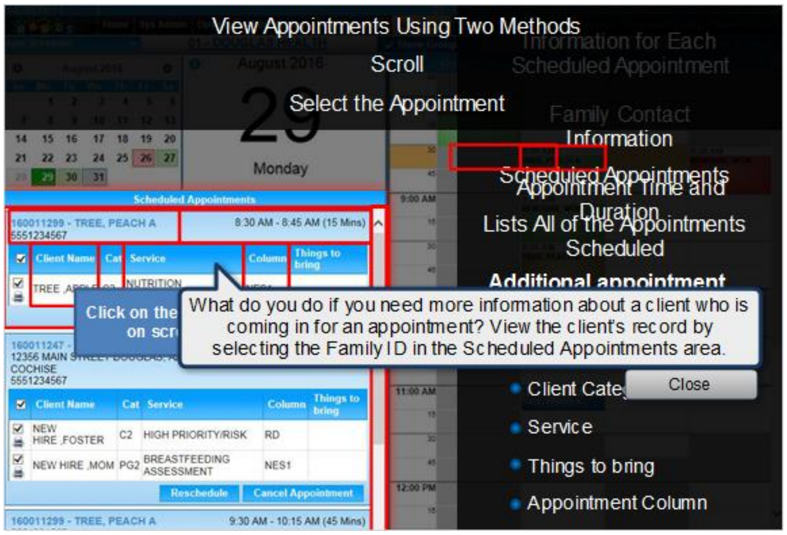
The Scheduled Appointments area is also on the left-hand side of the screen. This area lists all of the appointments scheduled for the calendar date you've selected.

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

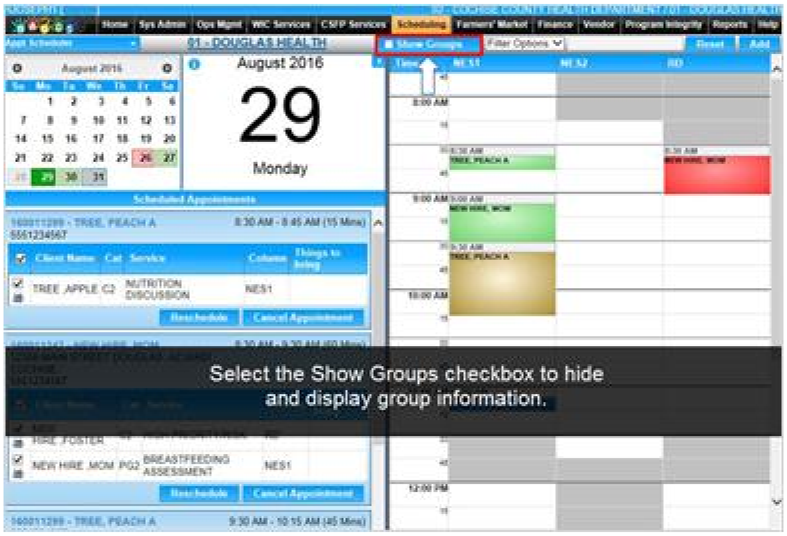
This information includes each client attending the appointment, the client's category, the service to be provided, and items the client needs to bring to the appointment. The appointment column in which the client is scheduled is also displayed.

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)



4.29 SCHEDULED APPOINTMENTS - GROUPS



Notes:

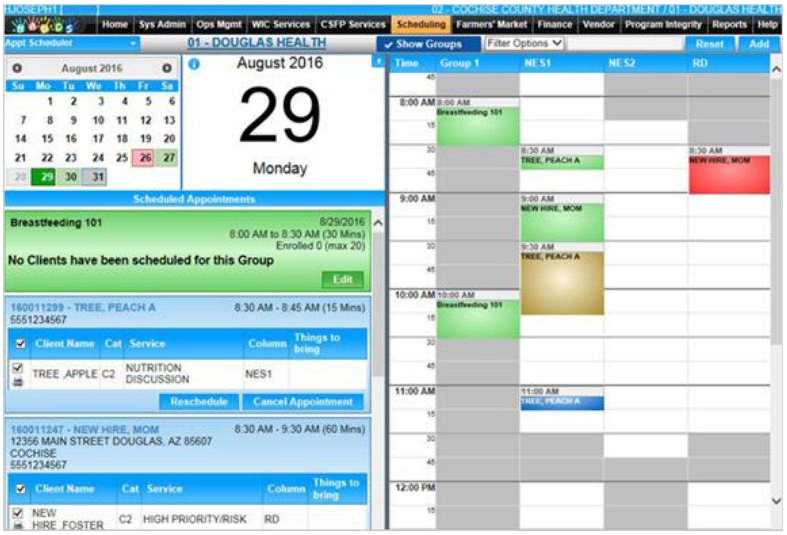
Groups for the day are listed in the Scheduled Appointments section as well. Group information is hidden on the schedule. To display groups select the Show Groups checkbox at the top of the screen.

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

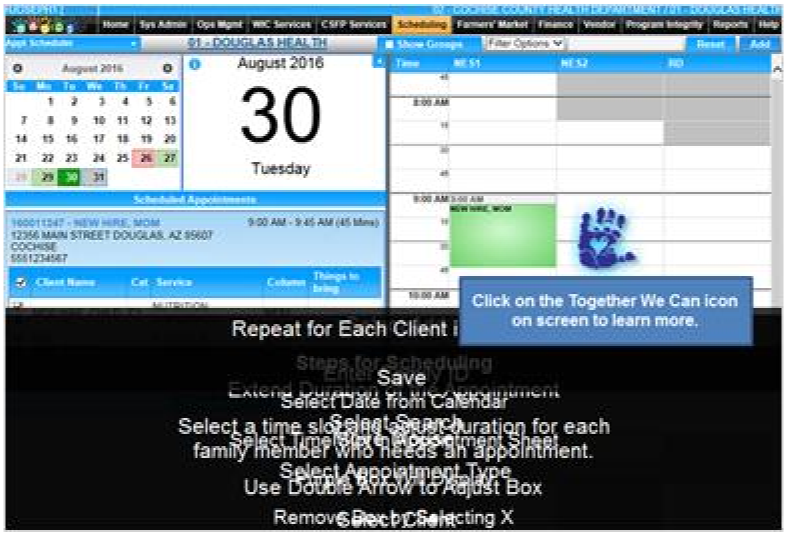
Client details will display if there are clients enrolled in the group. These details include Client ID, Name, Date of Birth, and Category.

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

SHOW GROUPS (SLIDE LAYER)



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.

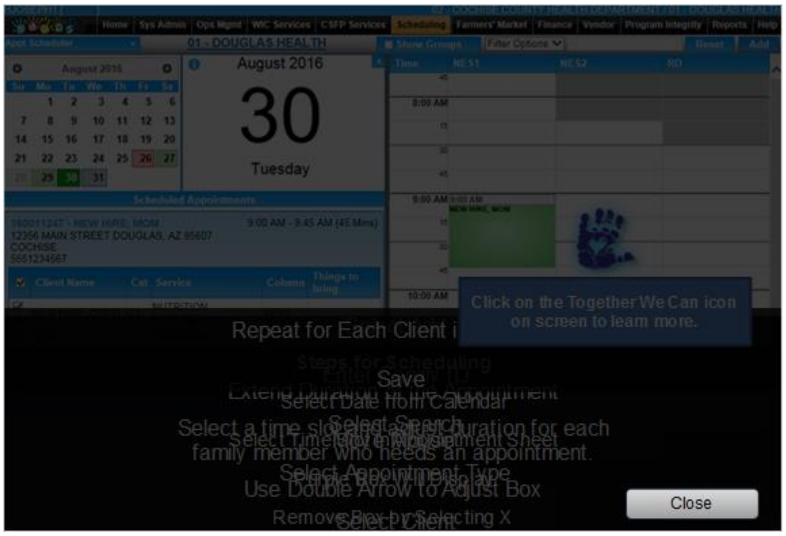
Next, select the Add button at the top right-hand corner of the screen. The Add pop-up displays. Enter the Family ID, and select the Search button. This retrieves the family information.

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

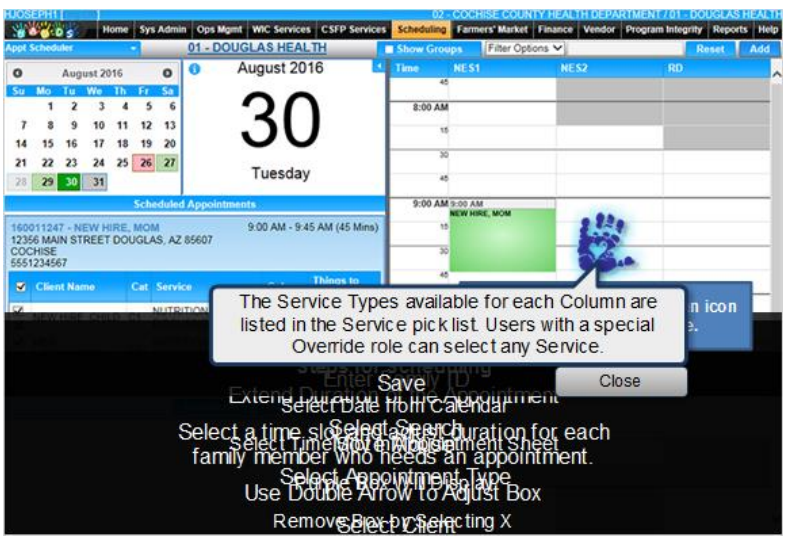
Repeat this process for each client in the family who needs an appointment.

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

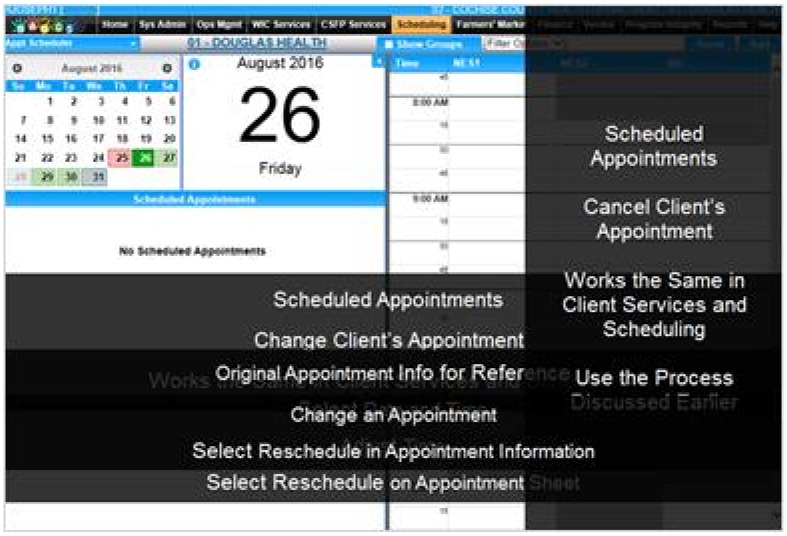
VIDEO (SLIDE LAYER)



TOGETHER WE CAN (SLIDE LAYER)



4.31 APPOINTMENT SCHEDULER - RESCHEDULE AND CANCEL



Notes:

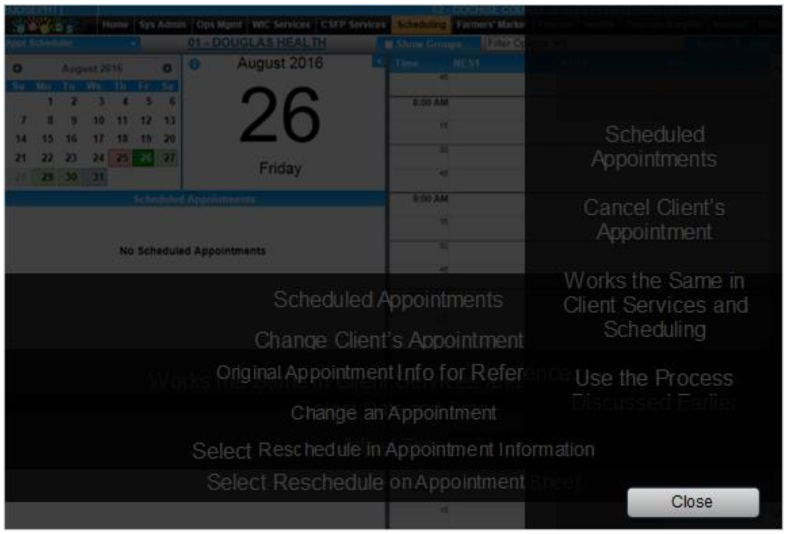
Use the Scheduled Appointments area to change a client's appointment. These processes work the same in both the Client Services and Scheduling modules.

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.

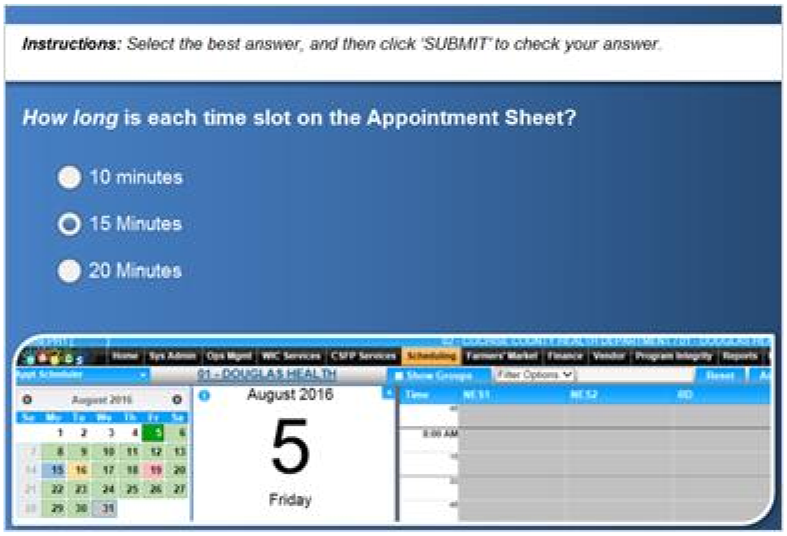
Use the Appointment Sheet to select the date and time that works for the client, and adjust the time slot duration. Select the Reschedule button in the Appointment Sheet to complete the process.

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.

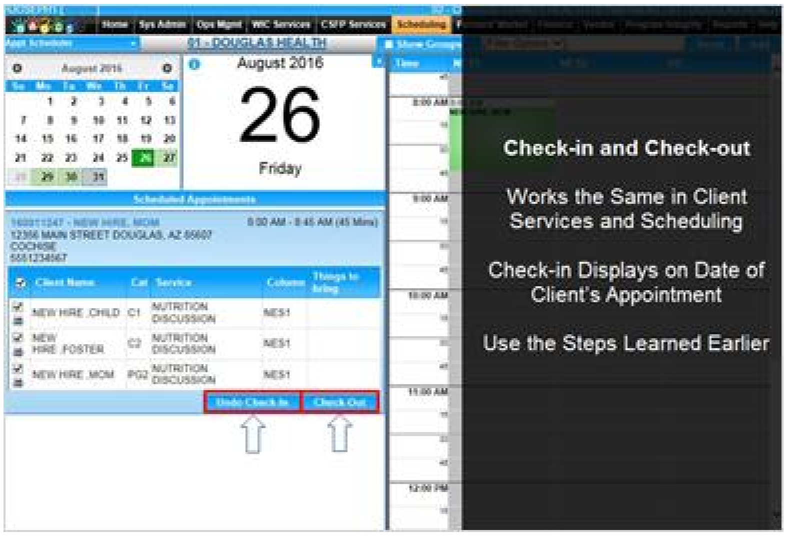
VIDEO EXAMPLE (SLIDE LAYER)



4.32 SELF-CHECK APPOINTMENT SHEET



4.33 APPOINTMENT SCHEDULER - CHECK-IN AND CHECK-OUT

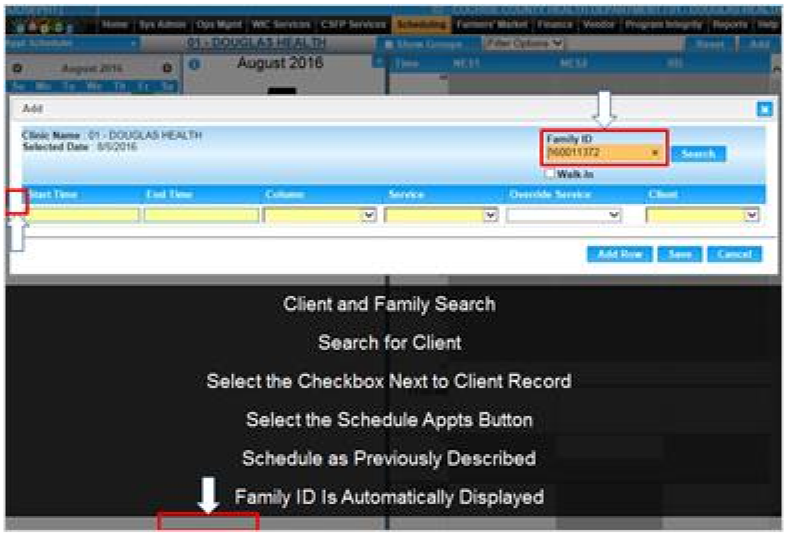


Notes:

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:

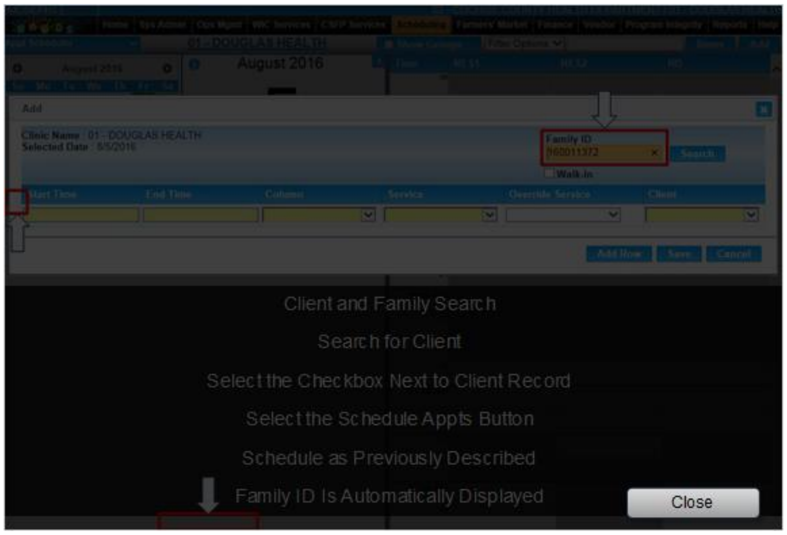
Appointments can also be scheduled through the Client and Family Search screen.

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.

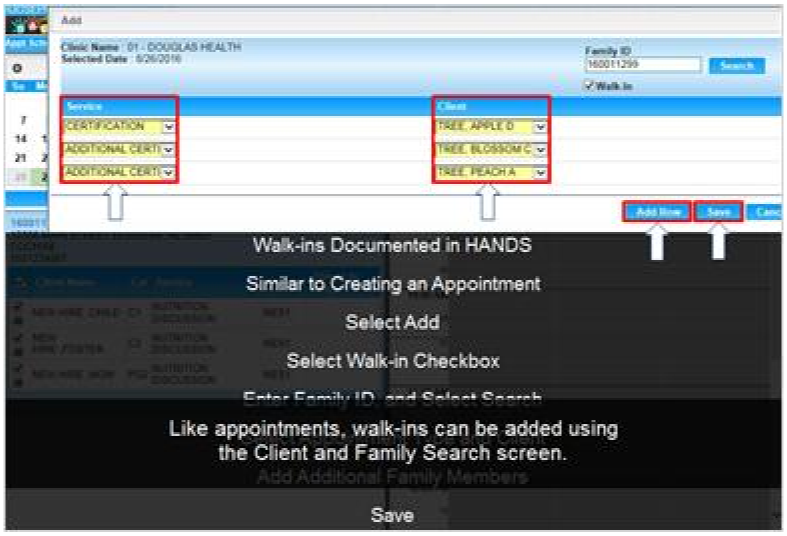
Next, go to the Scheduling module by selecting the Schedule Appointments button.

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



Notes:

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

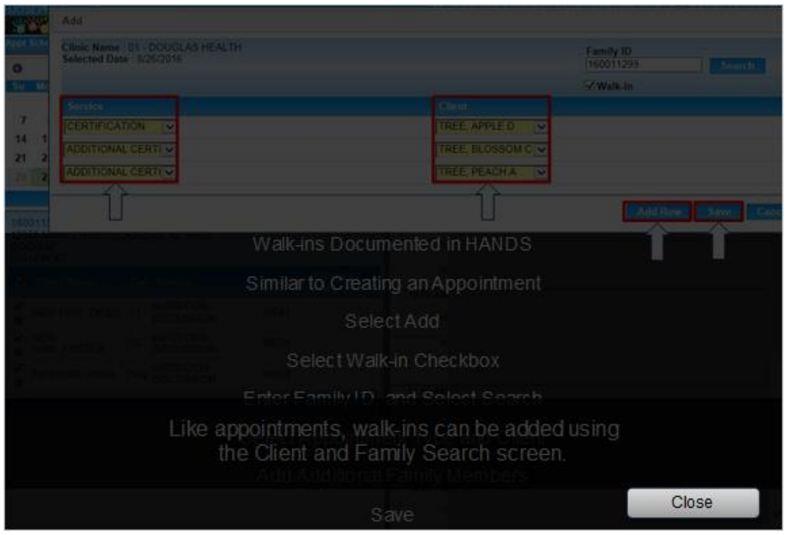
When a client comes into the clinic for services, but doesn't have an appointment, select the Add button on the Appointment Sheet. This will display the Add Window.

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

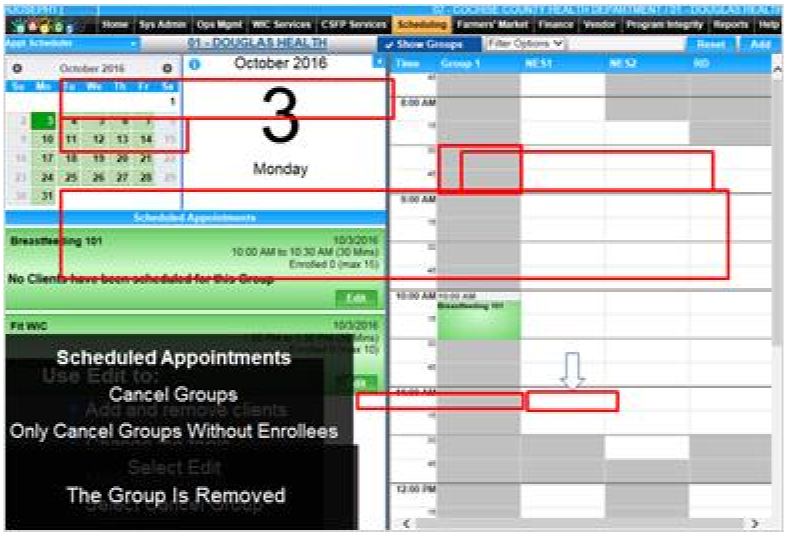
Then, select the appointment type from the Service pick list and the client from the Client pick list. Add additional family members by selecting the Add Row button.

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



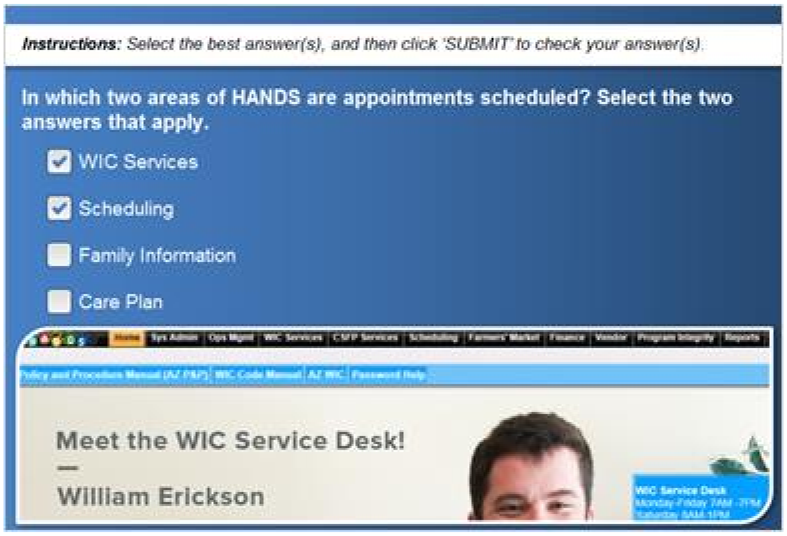
Notes:

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



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:

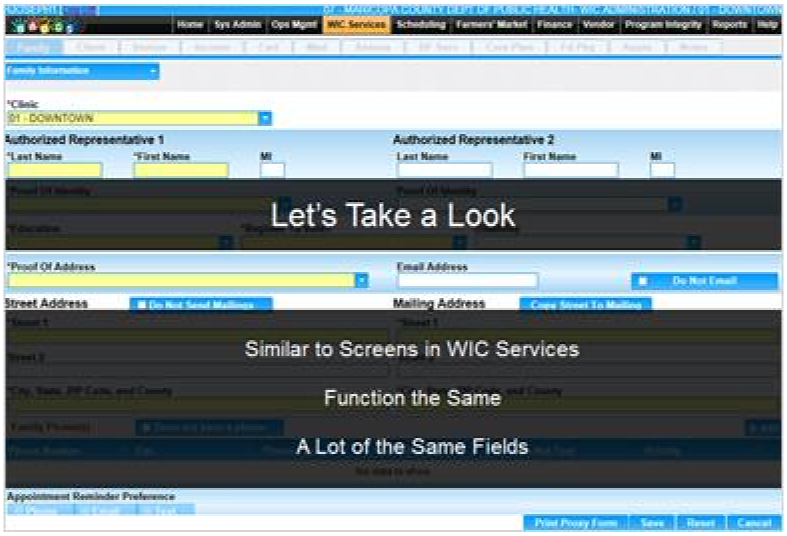
Now that you've learned about the HANDS screens you'll use most often, it's time to learn about some useful screens that you may not use every day.

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



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

Notes:

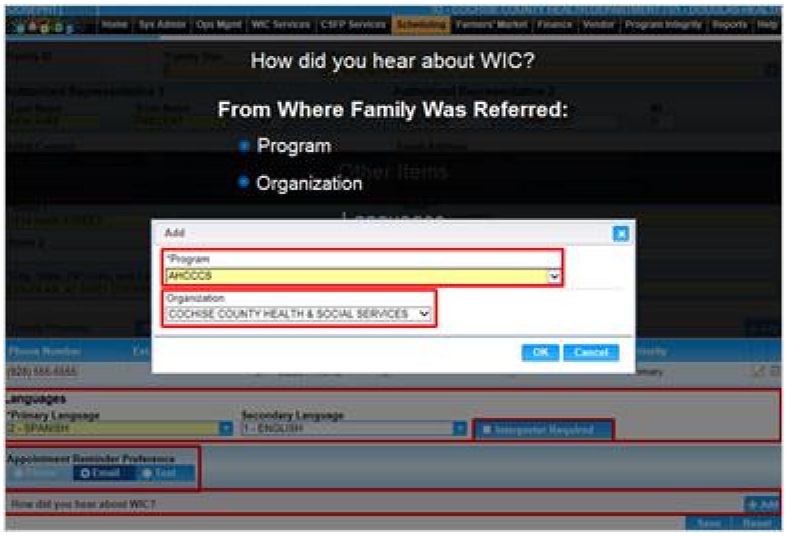
The Family Information screen in the Precertification module has a lot of the same fields as the Family Information screen in WIC Services. The screen also has some additional fields to help determine client eligibility.

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



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

Notes:

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

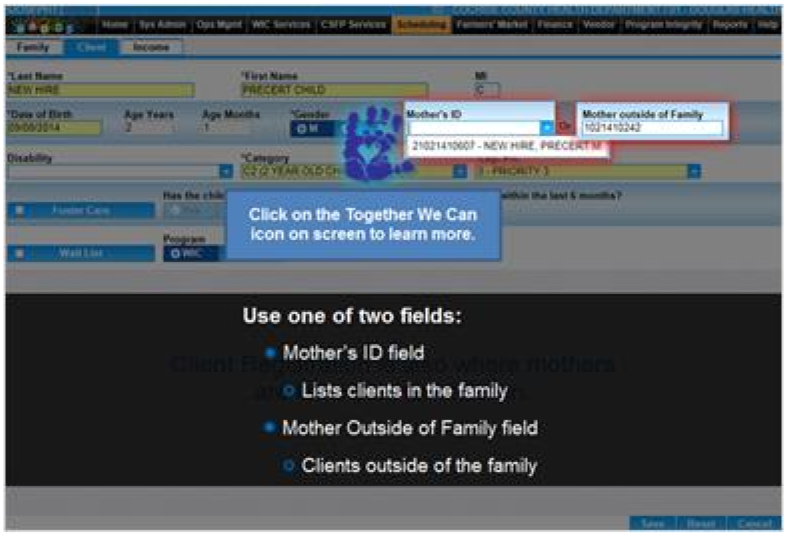
Like the screen in WIC Services, the Client Registration screen in Precertification is where basic information about your client is documented.

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



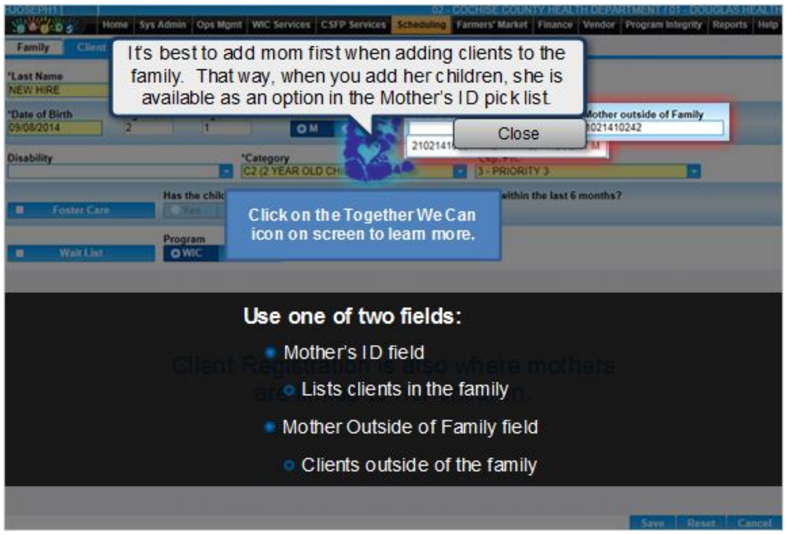
Notes:

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.

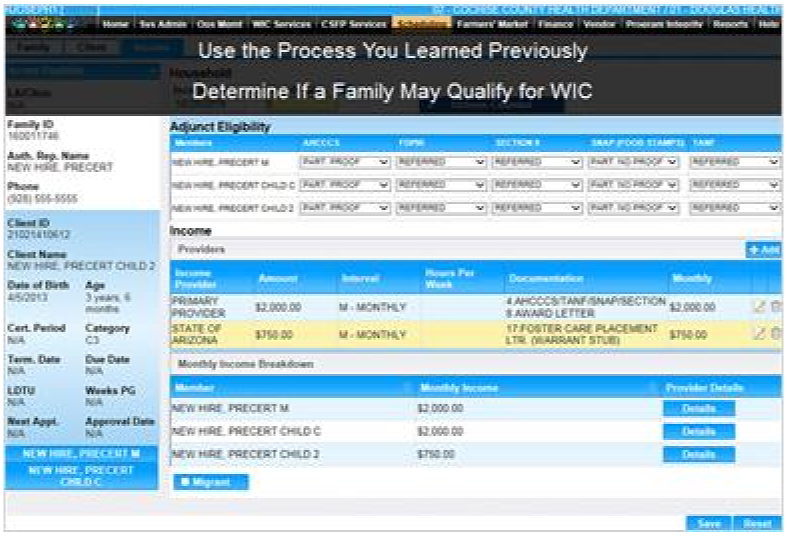
Use the Mother's ID field to select from the eligible clients in the family.

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)



5.7 PRECERTIFICATION - INCOME



Notes:

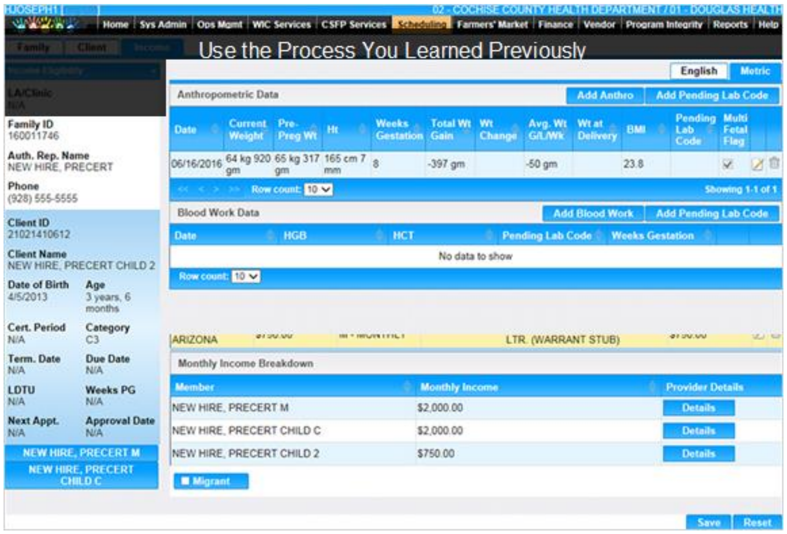
The last of the Precertification screens is the Income Eligibility screen, or Income screen, for short. The Income screen in Precertification is exactly the same as the Income screen in WIC Services. However, in Precertification, this screen is optional.

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

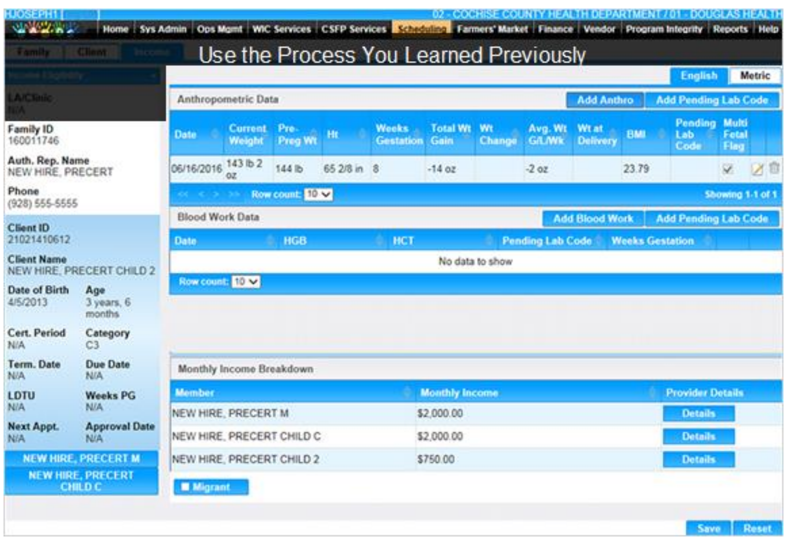
This information includes Family Size information, Adjunct Eligibility or referrals to Adjunctively Eligible programs, household income, and other eligibility information.

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)



METRIC (SLIDE LAYER)



5.8 INCOME - ADJUNCT ELIGIBILITY

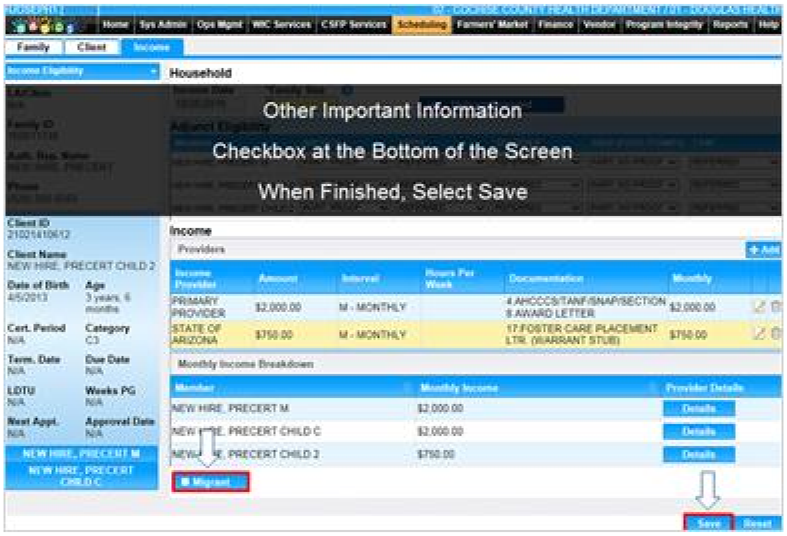
Notes:

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

Document whether or not the clients are participating in these programs, 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



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.

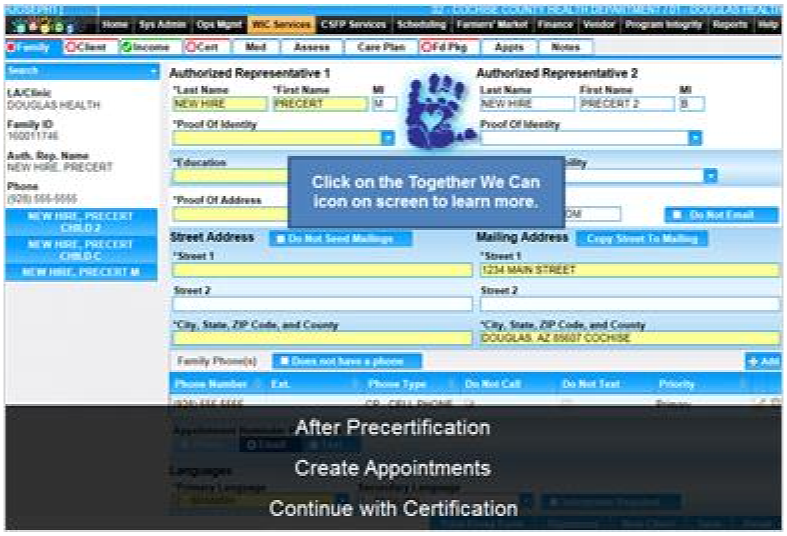
You'll also document foster family members separately from other members of the family.

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



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.

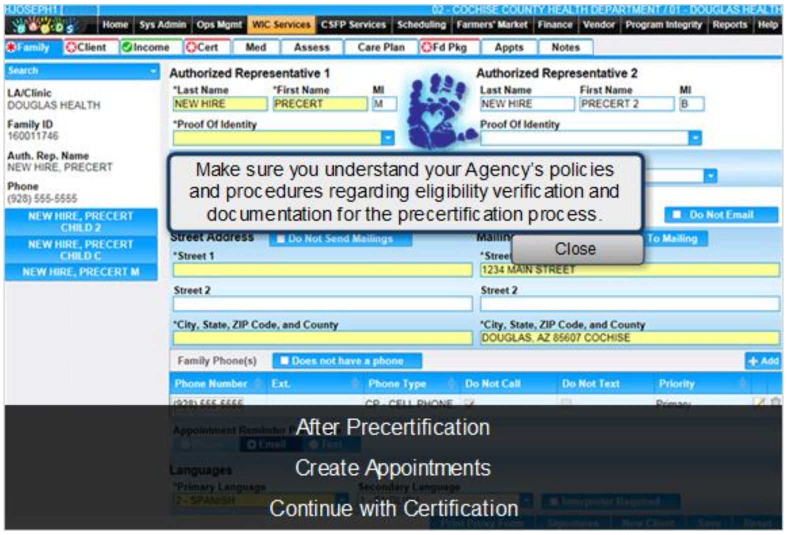
The main grid lists the name of the client and his or her Monthly Income.

Select the Details button to see more information about each client.

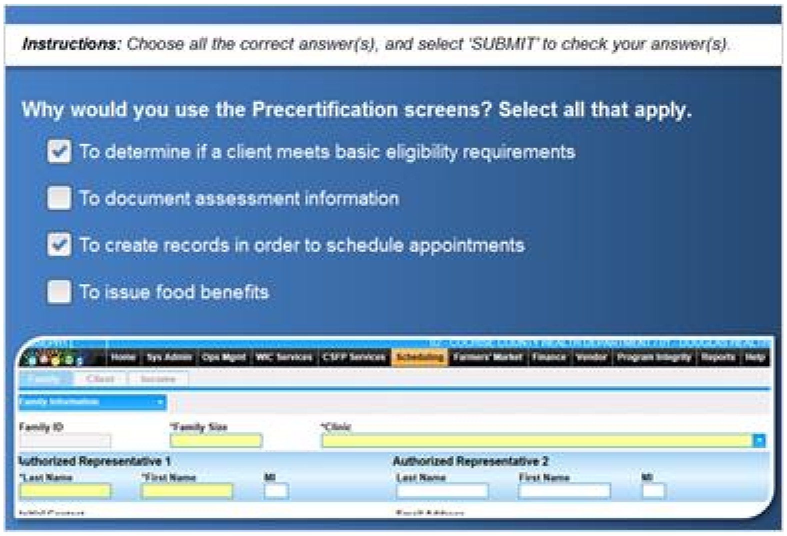
If there are multiple income providers for the client, it will list how much comes from each provider per month for that client.

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

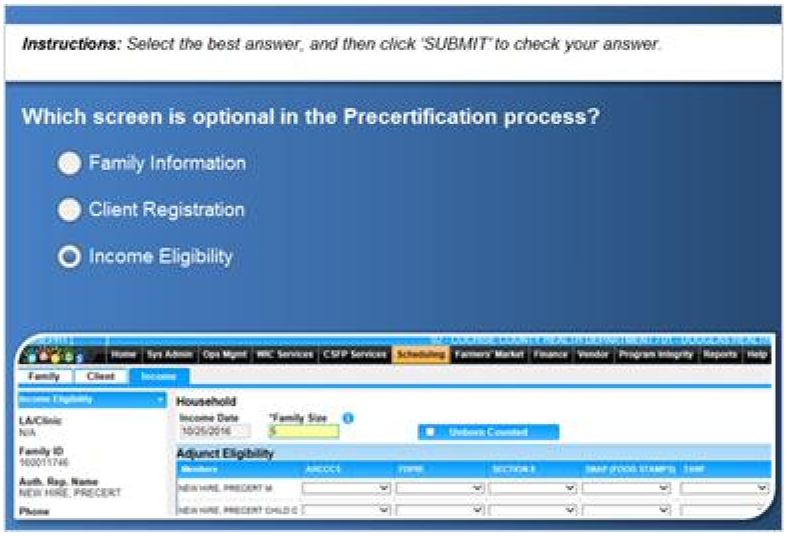
TOGETHER WE CAN (SLIDE LAYER)



5.11 SELF-CHECK - THE PURPOSE OF PRECERTIFICATION



5.12 SELF-CHECK - PRECERTIFICATION SCREENS



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

Notes:

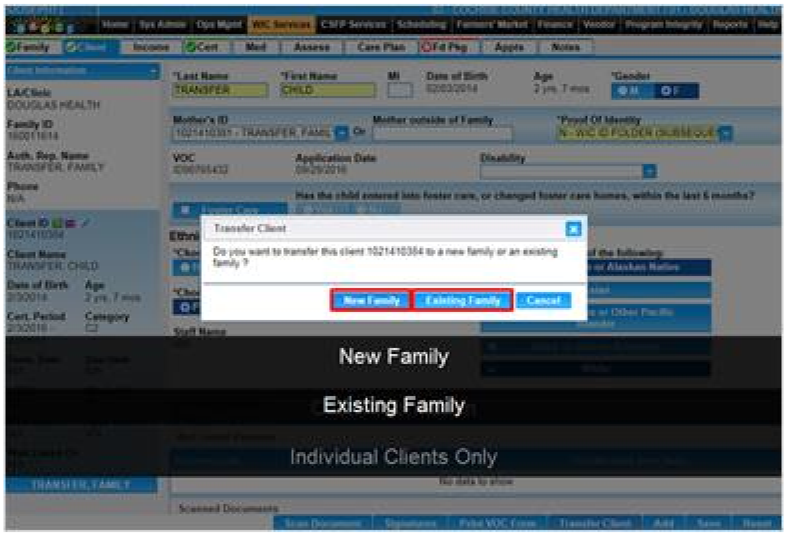
You've learned about some of the screens that help provide services to clients. Now it's time to learn about a few more.

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



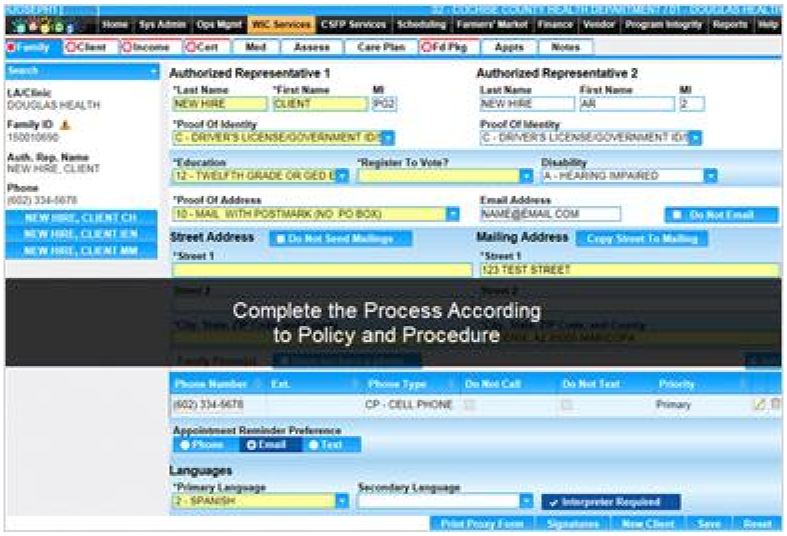
Notes:

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



Notes:

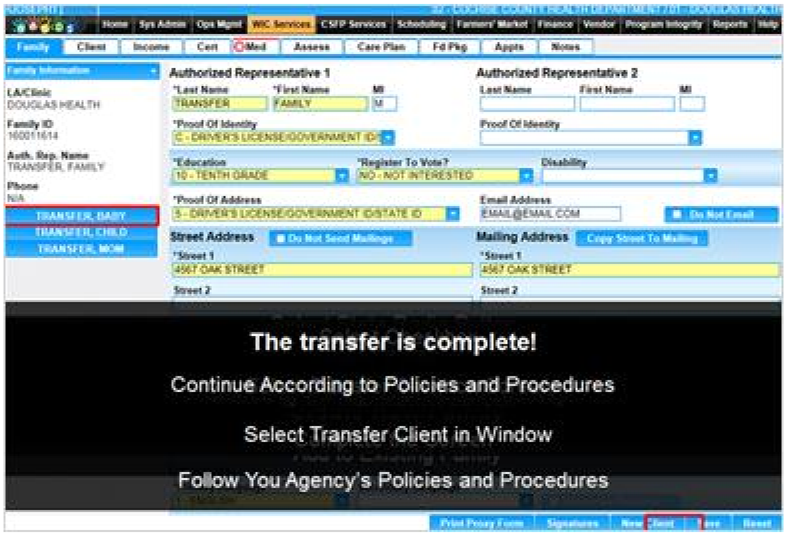
As we just learned, the Client Family Search screen can be used to transfer an entire family.

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



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.

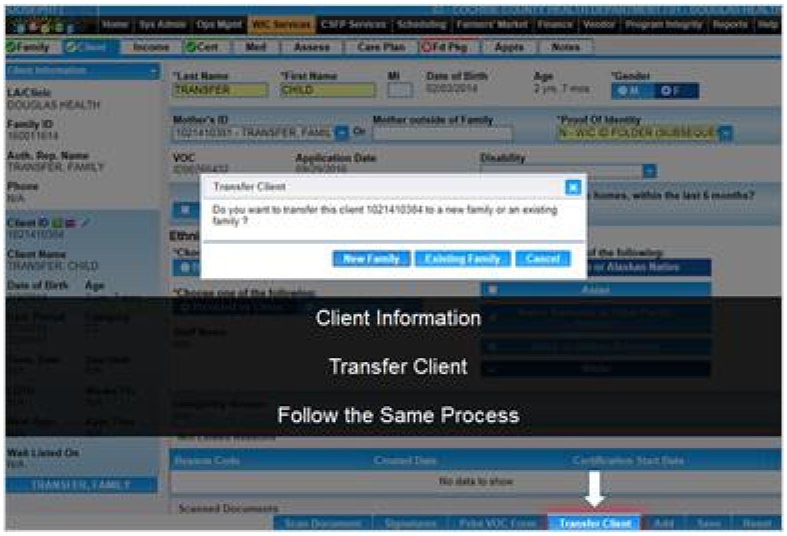
Select New Family to create a new family record for the client. This will take you to a blank Family Information screen. Complete the Family Information screen to finish the transfer process. Make sure you follow your Agency's policies and procedures.

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.

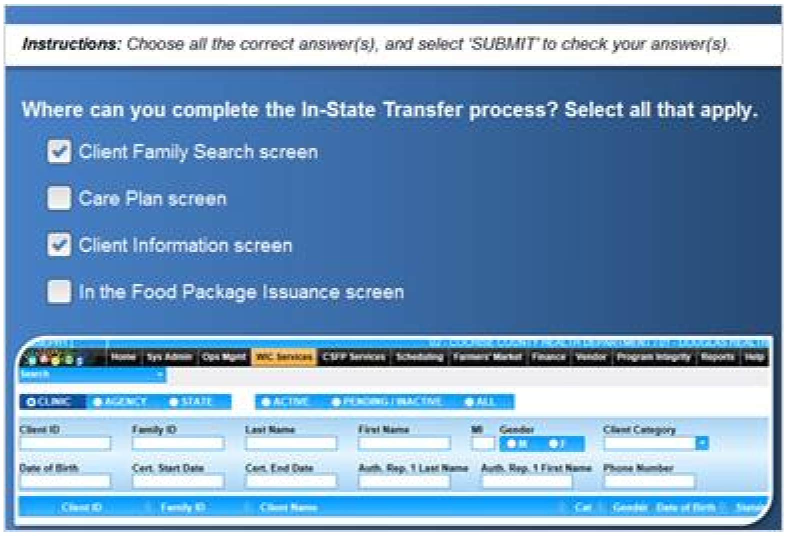
6.5 IN-STATE TRANSFER - CLIENT INFORMATION



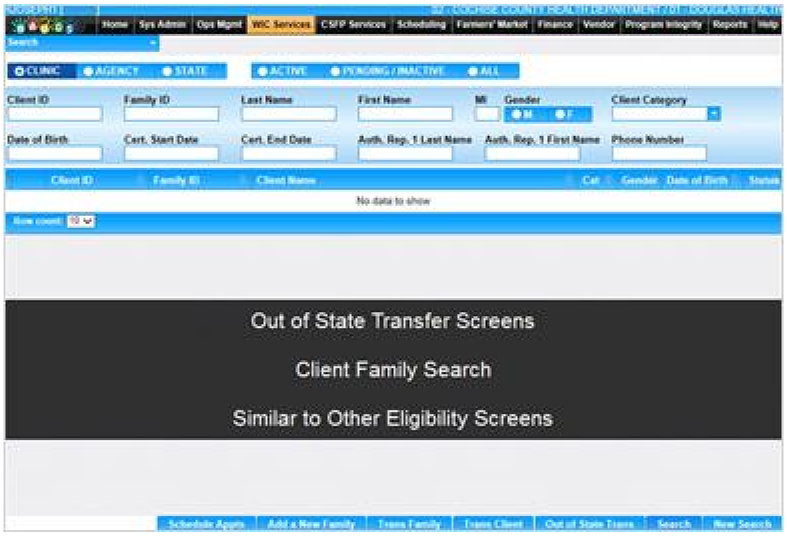
Notes:

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



6.7 OUT OF STATE TRANSFER

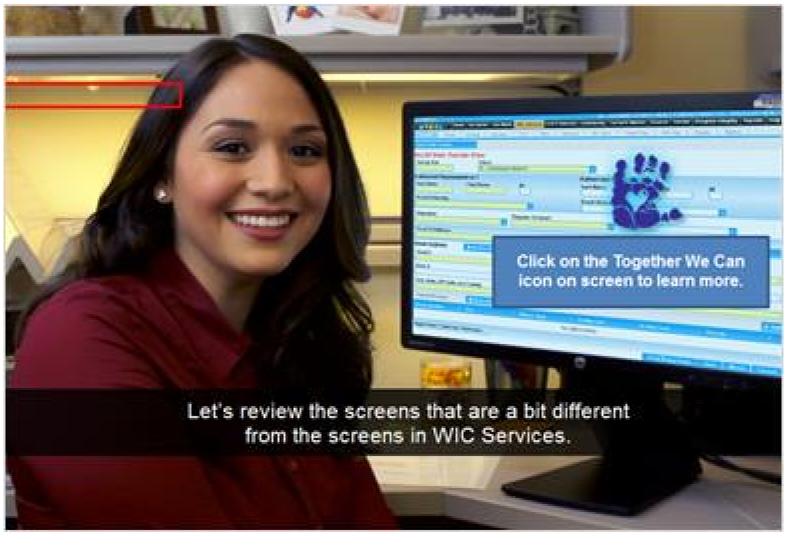


Notes:

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:

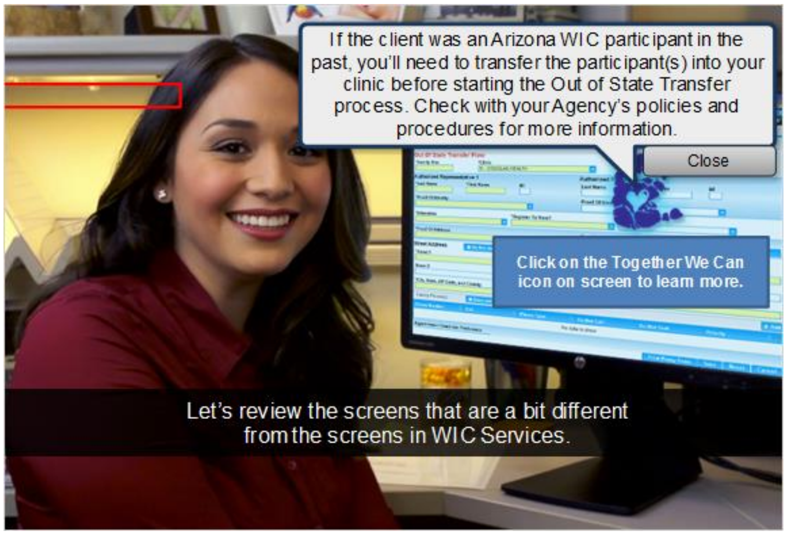
Start on the Client Family Search screen. Like starting a certification, start by searching for the client to see if his or her record is already in HANDS.

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

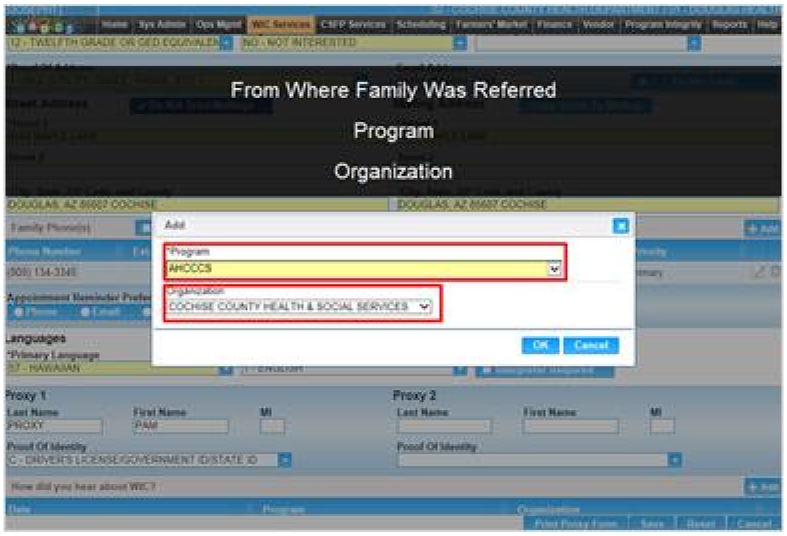
All of the screens involved in Out of State Transfer will display a red message letting you know that you are in the Out of State Transfer Flow instead of the regular Certification Flow.

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



Notes:

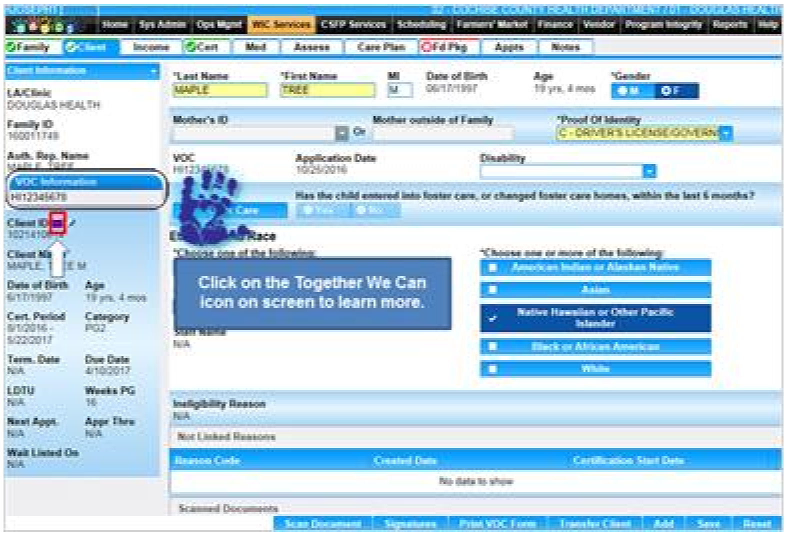
The Family Information screen in the Out of State transfer process has a lot of the same fields as the Family Information screen in WIC Services. The screen also has a Family size field.

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.



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.

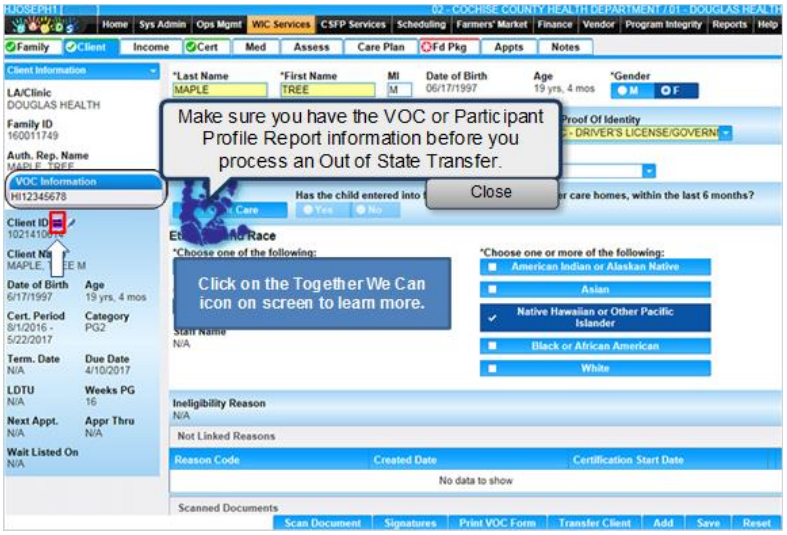
Complete the fields as you would complete them in WIC Services, and then select Save.

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.

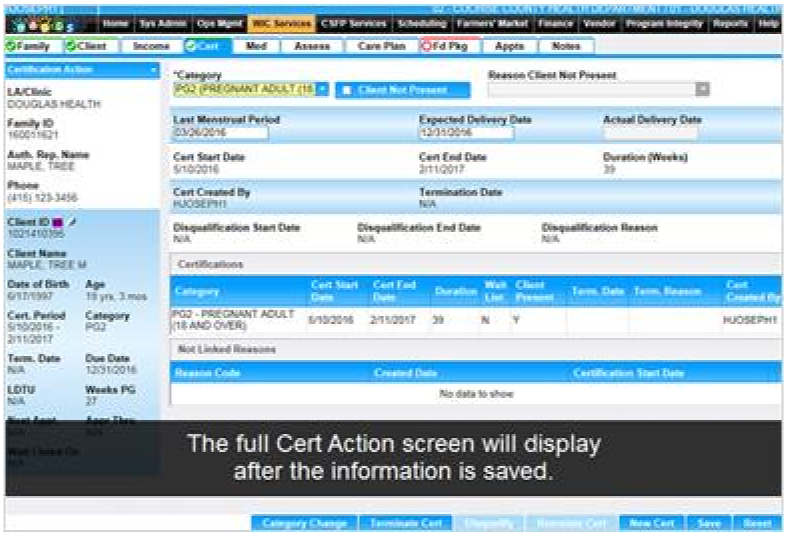
Select Cancel to stay on the Client Information screen and add more clients to the family.
Select the Yes button to go to the Cert. Action screen.

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)



6.11 OUT OF STATE TRANSFER - CERTIFICATION ACTION



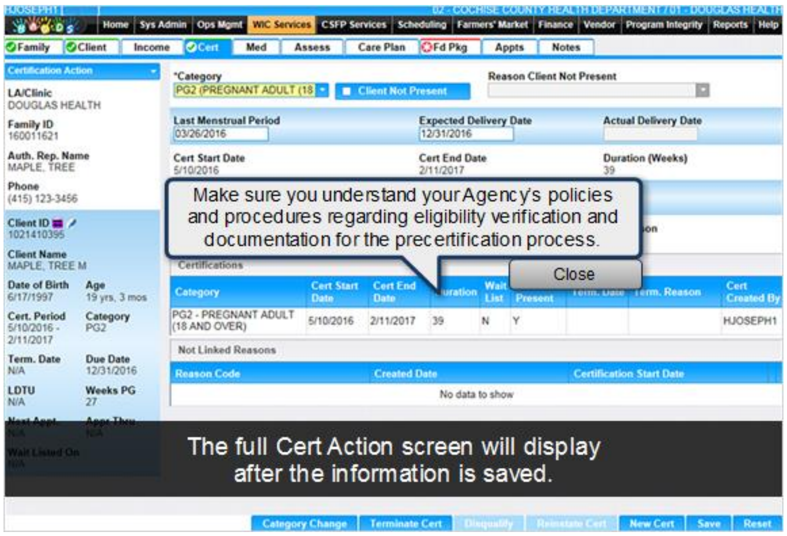
Notes:

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.

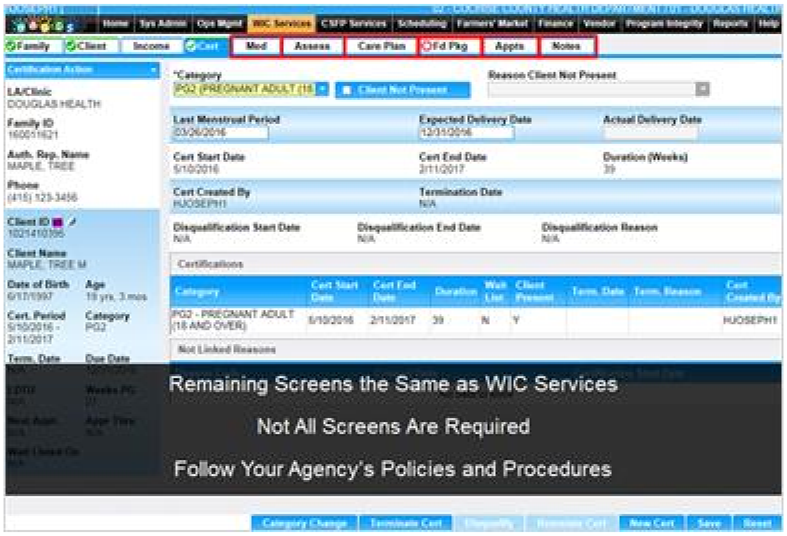
Document the client's Start Date and Priority Level using information on the client's VOC form. Complete the other fields as you normally would.

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

TOGETHER WE CAN (SLIDE LAYER)



6.12 OUT OF STATE TRANSFER - OTHER SCREENS

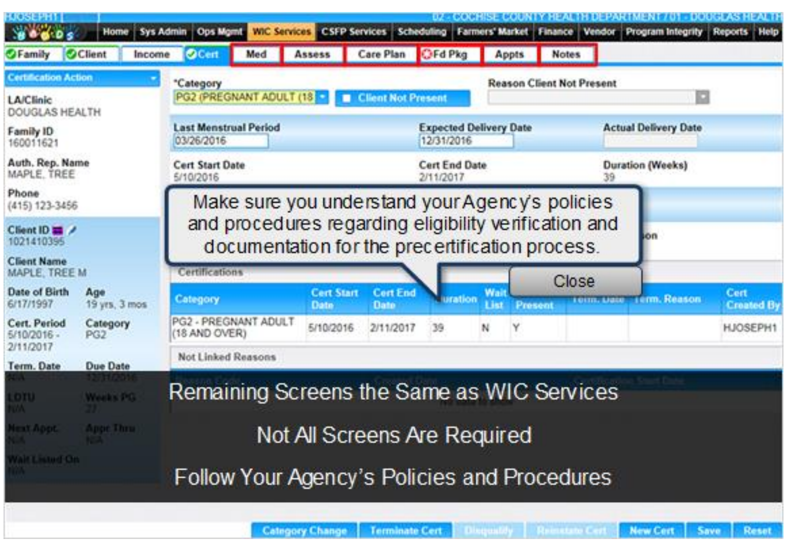


Notes:

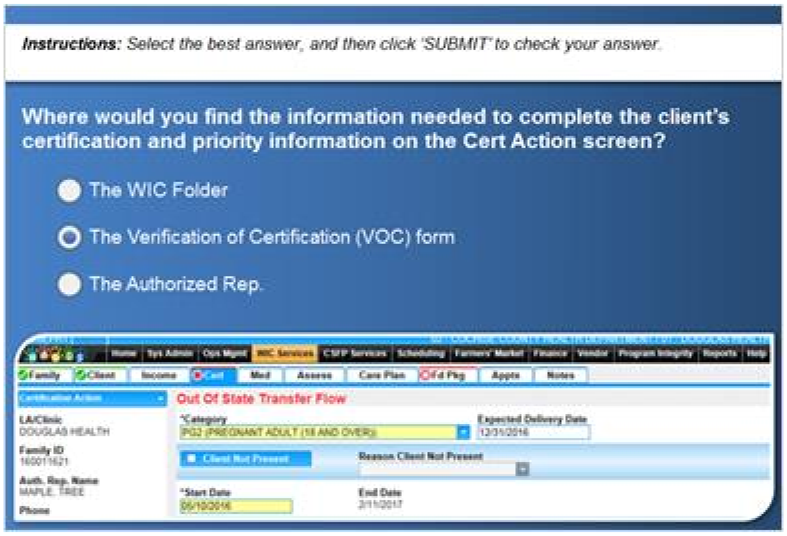
The remaining screens in the Out of State Transfer Flow are exactly the same as the screens in WIC Services.

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.

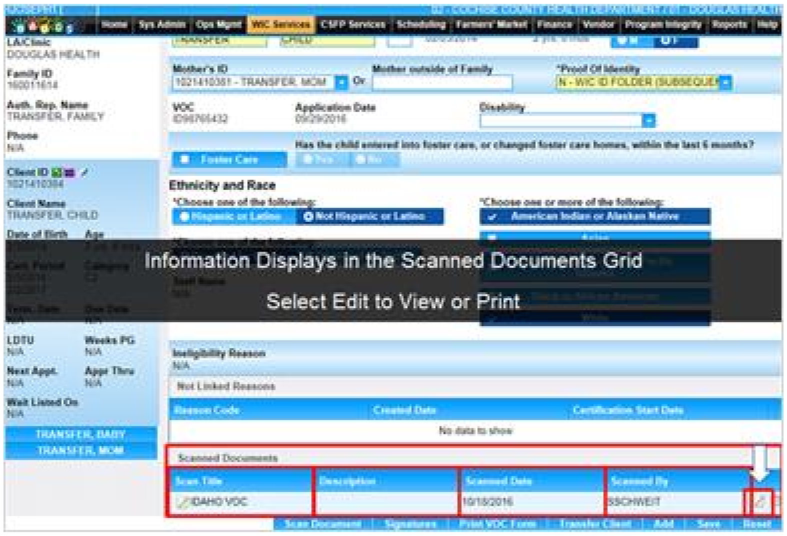
TOGETHER WE CAN (SLIDE LAYER)



6.13 SELF-CHECK - OUT OF STATE TRANSFERS



6.14 OUT OF STATE TRANSFER - SCANNING



Notes:

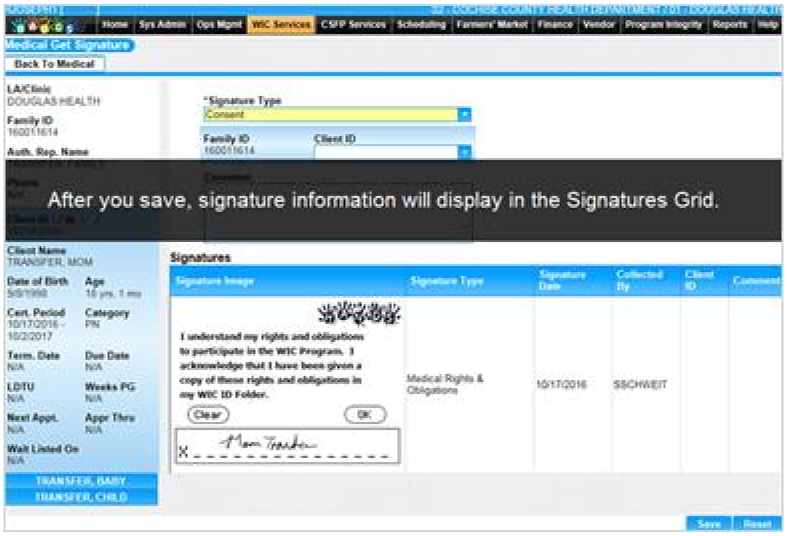
The scanning functionality is available on the Client Information screen in the Out of State Transfer process. You'll need to scan in the client's VOC when you are adding him or her to the system.

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.

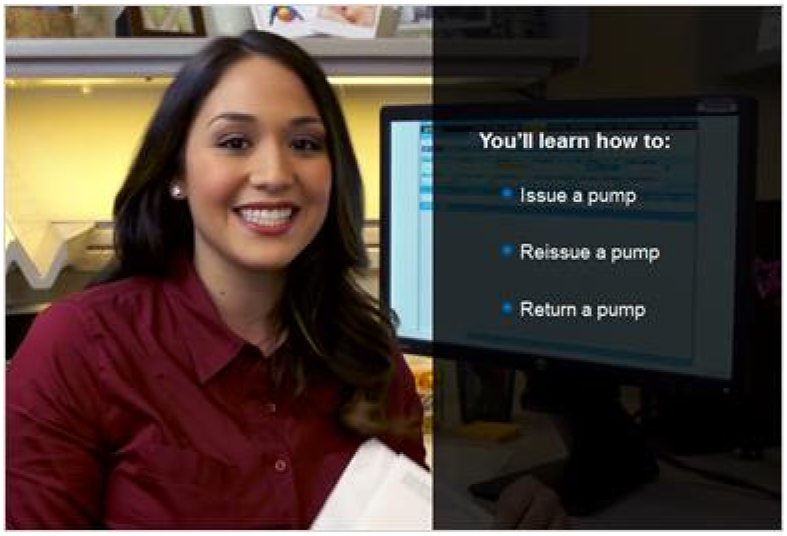
You learned how to transfer WIC families and clients who participate in your State Agency. You know how to create records for families and clients who participate in other State WIC programs.

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



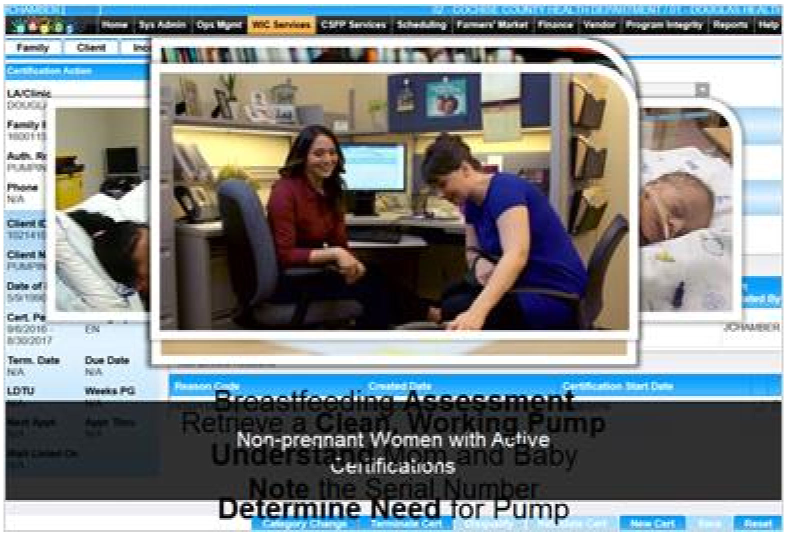
Notes:

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.

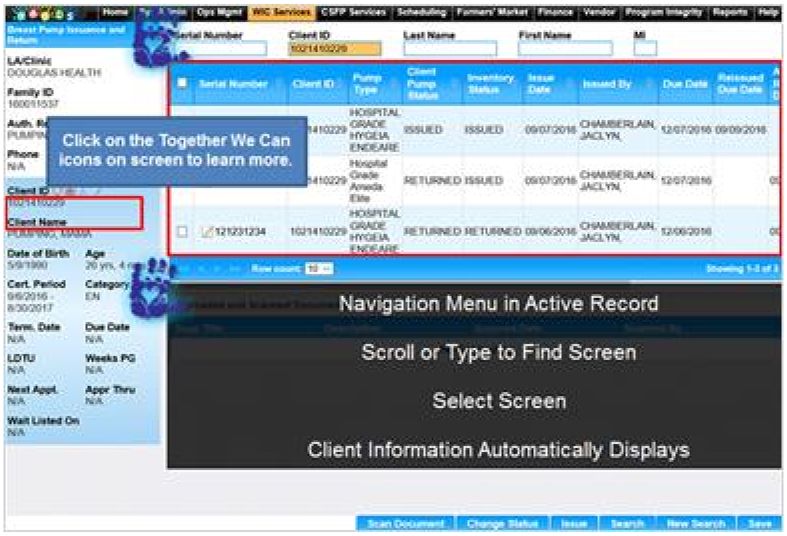
So, what needs to be done before issuing a pump in HANDS? First, make sure the client is in an active certification. Then, make sure the client's category is eligible for a breast pump. HANDS will only issue pumps to non-pregnant women with active certifications.

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



Notes:

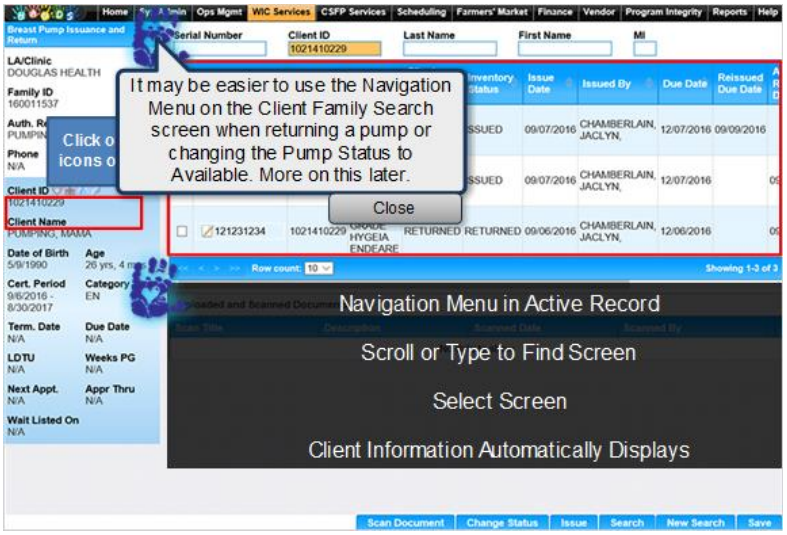
To issue a pump in HANDS, navigate to the Breast Pump Issuance and Return. The screen does not have its own tab on the Certification Flow Menu; however, there are a couple of ways to get there.

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

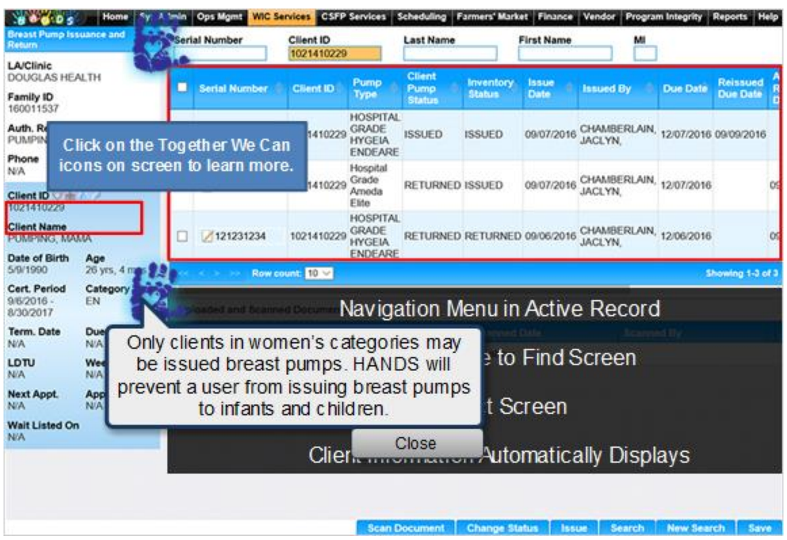
You can also get to the Breast Pump Issuance and Return screen using Active Record. After a client has been selected, select the Navigation Menu in Active Record. Search for the Breast Pump Issuance and Return screen by scrolling, or typing in the search field.

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.

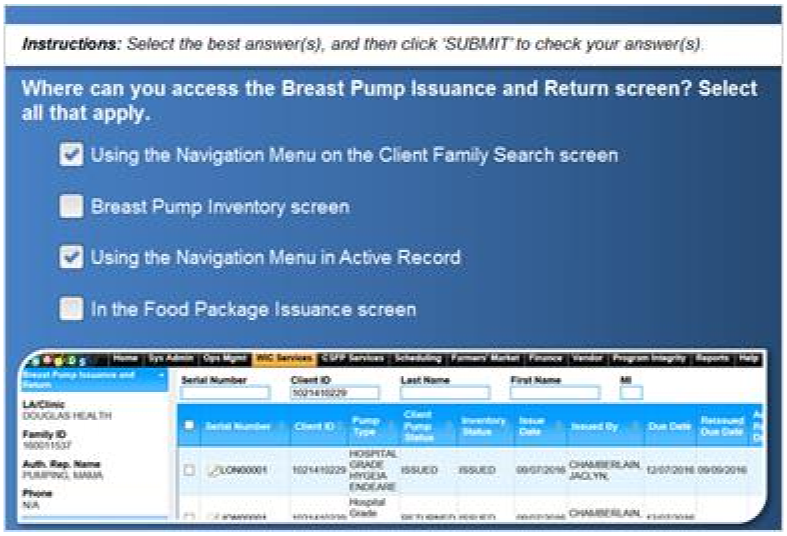
TOGETHER WE CAN (SLIDE LAYER)



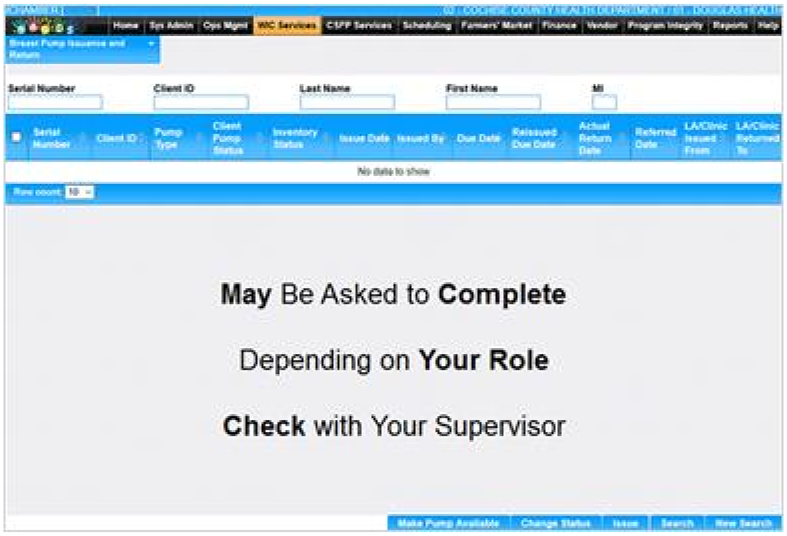
TOGETHER WE CAN - COPY (SLIDE LAYER)



7.4 SELF-CHECK - NAVIGATION



7.5 BREAST PUMP ISSUANCE AND RETURN SCREEN FUNCTIONS



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.

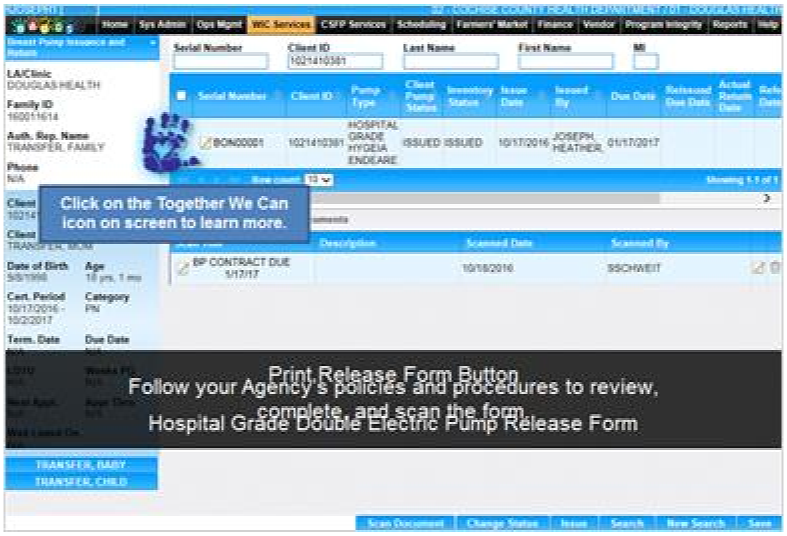
If the screen is accessed through Active Record, any documents that have been scanned into the client's record will display in the Uploaded and Scanned documents grid on the bottom of the screen.

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



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.

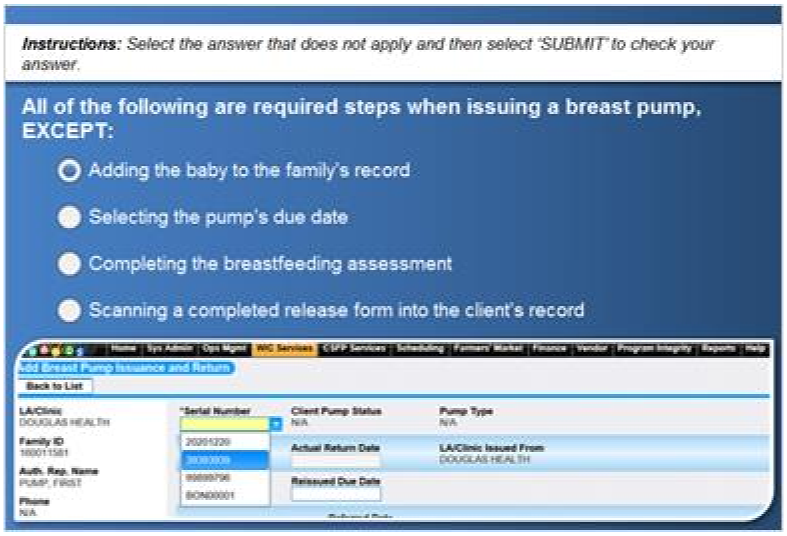
This will take you back into the Issue screen. Select the Print Release Form button to print the Hospital Grade Double Electric Pump Release Form.

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

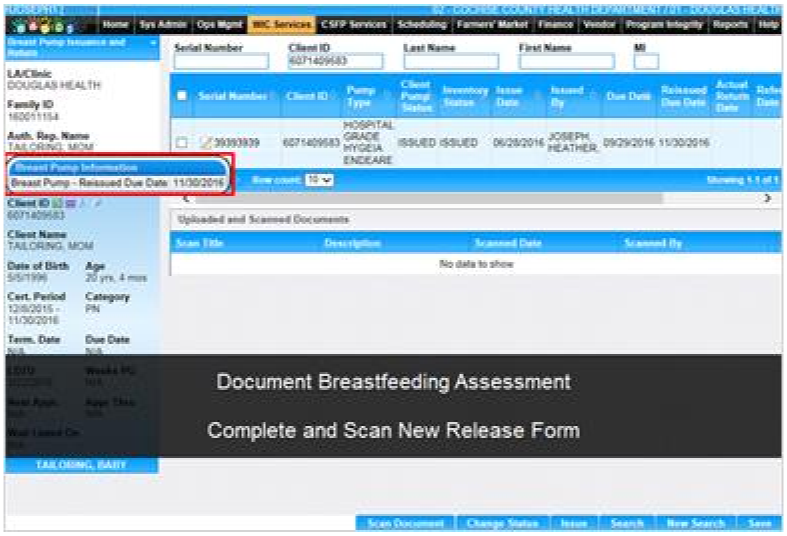
TOGETHER WE CAN (SLIDE LAYER)

7.7 SELF-CHECK - ISSUE A BREAST PUMP

(Multiple Choice, 10 points, 2 attempts permitted)



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



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

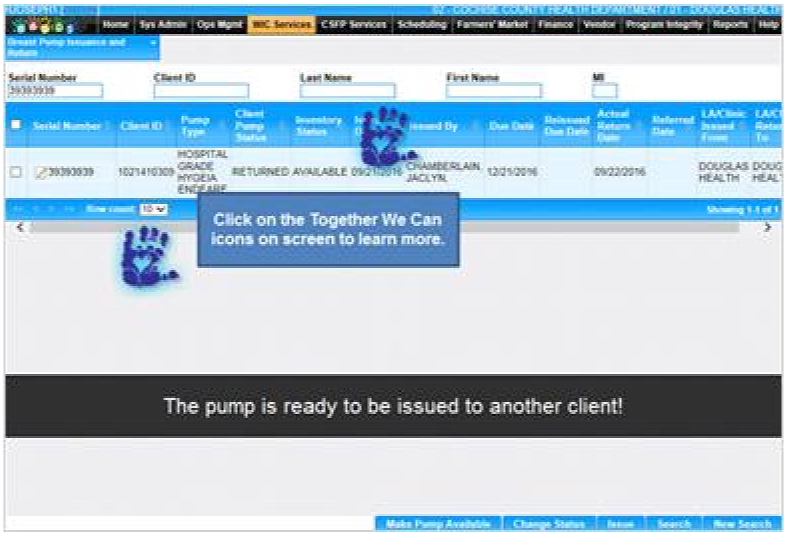
Notes:

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



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.

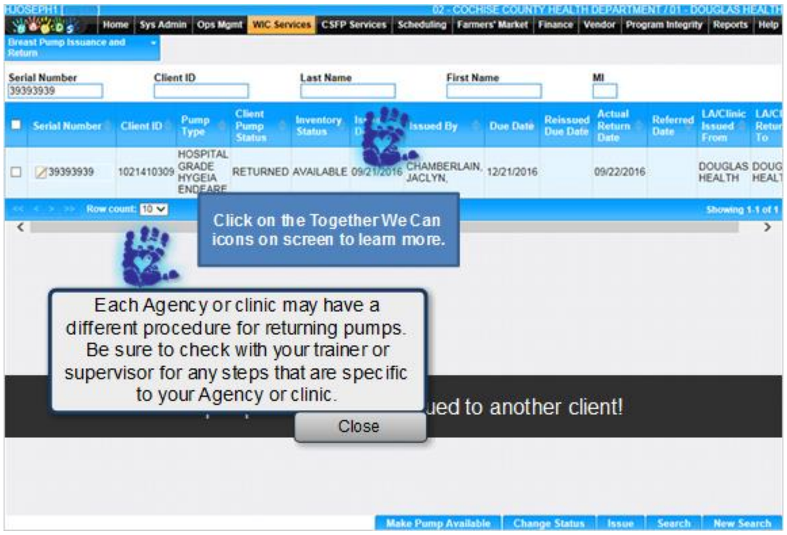
To make returned pumps available in HANDS, navigate to the Breast Pump Issuance and Return screen using the Navigation Menu on the Client Family Search screen. Then, enter the pump's serial number, and select the Search button.

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.

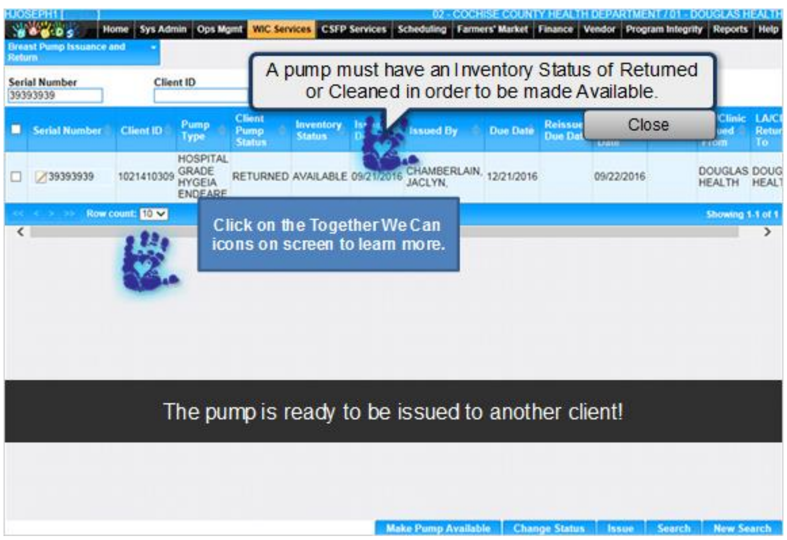
A window will appear verifying that you want to make the selected pump or pumps available. Select Yes to continue, or Cancel to return to the main screen. Selecting Yes will display a new window confirming the pump's availability.

Select OK to return to the main screen. The pump is now ready to be issued to another client.

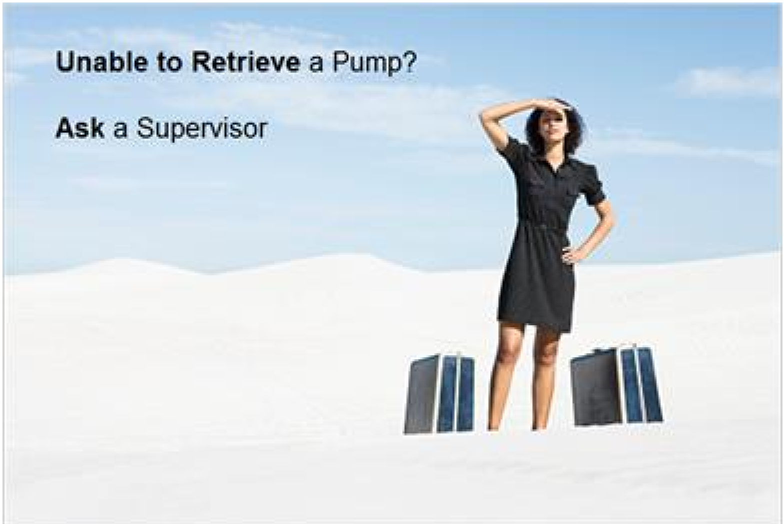
TOGETHER WE CAN (SLIDE LAYER)



TOGETHER WE CAN - COPY (SLIDE LAYER)



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.

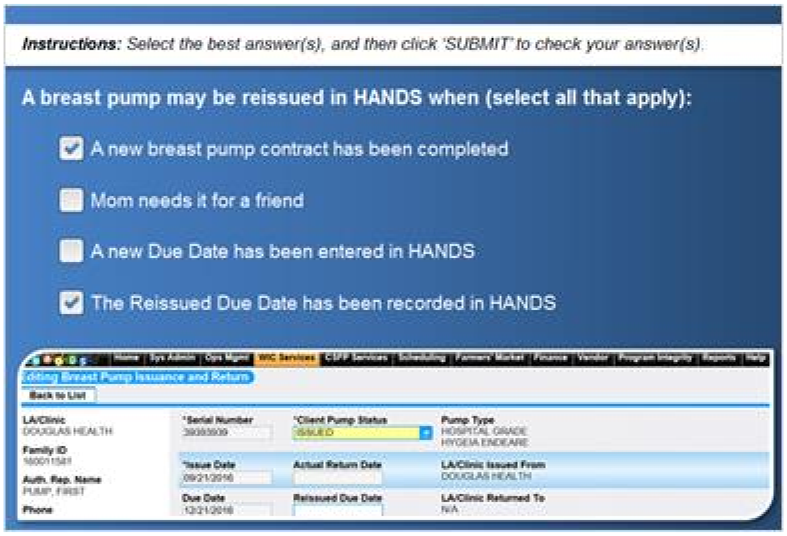
If the pump belongs to another Agency or clinic, it will not show up in a search. If you receive a pump that is not issued to a client in your clinic, or cannot be found when searching, check with your supervisor.

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



7.13 SUMMARY

Notes:

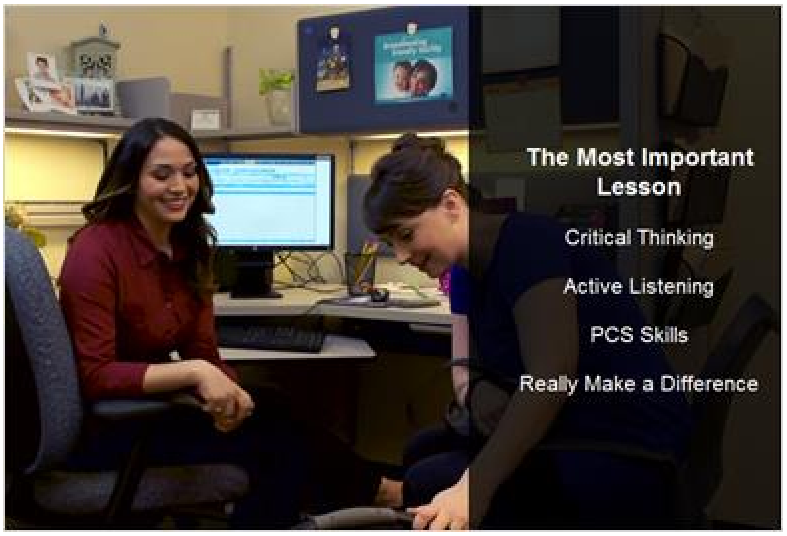
Great Job! You've completed Module 10 of the HANDS New Hire course.

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.