Arizona WIC Training

HANDS New Hire Course

Part 2

Trainer Guidebook

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WHAT WILL THE TRAINEE LEARN?

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

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

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

The HANDS New Hire course consists of 10 Modules

- Module 1: Introduction to HANDS
- Module 2: Intake
- Module 3: Eligibility
- Module 4: Assessment Part 1
- Module 5: Assessment Part 2
- Module 6: Completing the Certification
- Module 7: Appointments
- Module 8: Precertification
- Module 9: Transfers
- Module 10: Breast Pump Issuance and Return

After completing the HANDS New Hire course, the trainee will:

1. Be able to log into and navigate through HANDS
2. Search for and retrieve client/family records
3. Complete the certification process for a client
4. Understand how to update family and client records
5. Know how to issue benefits to a family
6. Demonstrate understanding of the Appointment Scheduling screens and functions in HANDS
7. Consider how they themselves can provide excellent customer service to WIC participants

INSTRUCTION LEVEL

Prerequisite for taking the HANDS New Hire course: WIC 101

ITEMS NEEDED FOR THIS COURSE

- Pen or pencil
- Access to Arizona WIC Manuals, either a hard copy or on the website, http://azdhs.gov/prevention/azwic/agencies/index.php#manuals
    - To save paper, you do not need to make copies of or print the policies or procedures
- Access to Local Agency policies and procedures
- Job aids:
    - Types of System Messages
    - Linking a Mother and Her Children
    - Income
    - Out of State Transfer Process
    - Growth Chart Reference Sheet
    - Tips for Creating Useful Notes
    - Assessment Resources

THINGS TO REMEMBER

- Each trainee shall receive a guidebook for this course, which is theirs to keep.
- Trainees are encouraged to take notes, highlight, or write in their guidebook.
- Training group size may be comprised of one or more trainees.
- If they need help or have questions about the information in the baby behavior course, trainees are encouraged to ask the trainer.
- As the trainer, you will assess the trainee's competence to apply the knowledge and skills taught in the baby behavior course training. A competent trainee offers appropriate answers to questions and demonstrates the ability to use critical thinking in the face-to-face activities and interactive discussions in this guidebook. If the trainee cannot determine appropriate responses or apply the information learned to typical scenarios in the WIC setting, the trainer will note the need for additional training.

RESOURCES

1. HANDS Help Desk 1-888-432-9225
2. CMA HANDS Clinic Training Manual
3. USDA WIC Home http://www.fns.usda.gov/wic/women-infants-and-children-wic
4. Arizona WIC Home http://www.azdhs.gov/prevention/azwic/index.php
5. Arizona HANDS Training Website http://www.azdhs.gov/azwic/trainers/index.htm
6. Arizona WIC - Resources for Trainers http://azdhs.gov/azwic/together/change.htm
7. Arizona Nutrition Assessment Training http://azdhsmedia.com/hands/index.php
8. Arizona WIC Local Agencies Home http://azdhs.gov/azwic/local_agencies.htm
9. Arizona WIC Program Policy and Procedure Manual http://azdhs.gov/prevention/azwic/agencies/index.php#manuals
10. Arizona WIC Laboratory Manuals http://azdhs.gov/documents/prevention/azwic/manuals/azwic-lab-manual.pdf
11. Arizona WIC Risk Manual http://azdhs.gov/documents/prevention/azwic/manuals/nutrition-risk-manual.pdf
12. Arizona WIC Anthropometrics Module http://azdhs.gov/documents/prevention/azwic/manuals/wic-anthropometrics-module.pdf

MODULE 4: ASSESSMENT PART 1

TRAINEE'S STEPS:

Begin the LMS HANDS New Hire course. Please complete the following steps:

- ☐ If necessary, log back into: https://az.train.org/DesktopShell.aspx
- ☐ If necessary, re-open the HANDS New Hire LMS course
- ☐ Complete Module 4: Assessment Part 1
- ☐ Complete the HANDS New Hire Activity 4 either individually, with other trainees, or with your trainer
- ☐ Meet with your trainer to discuss Module 4 and HANDS New Hire Activity 4

TRAINER'S STEPS:

- ☐ Have the trainee complete Activity 4, either individually, or as a group with the other trainees. As the trainer, you may decide whether or not to be present while the trainee works on the activity.
- ☐ Once finished, the trainee shall meet with the trainer to review the answers to the activity. Please answer all questions the trainee may have, and clarify any incorrect answers.

HANDS NEW HIRE ACTIVITY 4

COMPETENCY:

1. Trainee can identify the sections of the Medical screens.
2. Trainee is able to document anthropometric and blood work data.
3. Trainee understands how to utilize Weight Gain Grids and Growth Charts.

MEDICAL

1. What are your Agency's policies and procedures for collecting anthropometric measurements?

   Facilitate a discussion about your Local Agency's policies and procedures for collecting anthropometric measurements. Review the WIC Anthropometric Module.

2. What are your Agency's policies and procedures for collecting blood work?

   Facilitate a discussion about your Local Agency's policies and procedures for collecting blood. Review the Arizona WIC Laboratory Manual.

3. When would you use a Pending Lab Code?

   Facilitate a discussion about your Local Agency's policies and procedures for Pending Lab Codes. Review Chapter 2 in the Arizona WIC Program Policy and Procedure Manual and the WIC Anthropometric Module.

4. How is the Medical screen linked to the Assessment screen?

   The data entered on the medical screen may trigger the assignment of WIC Codes on the Assessment screen.

5. What would you do if you noticed an error related to anthropometrics on the Assessment screen?

   If errors are noticed on the same day that data was entered, go back and correct them. If errors are noticed during subsequent visits, create a note explaining the error and provide the correct data, if possible.

6. How would you start a conversation about a client's growth/weight gain?

Facilitate a conversation on talking with a client about growth/weight gain. An example could be:

> **"Starting conversations about growth can be difficult. Here are some suggestions. You could offer the Growth Chart with one of these questions, "Would you be interested in seeing where your child plots on the growth grid?" or "Would you like to see how your weight has been tracking?""**

7. What would you do if a client didn't want to talk about growth/weight?

   If the client is not interested or declines, remember to "roll with resistance" and move on. No matter where they are in the graph, you'll always end up talking about diet and physical activity during the D assessment.

8. How are Pending WIC Codes and benefit issuance related?

   Each Pending WIC Code is assigned a number of months of benefits. The correct code must be selected in order to ensure a client receives the appropriate benefits.

9. Where is the Multi Fetal Flag checkbox? Why is it important?

   The Multi Fetal Flag checkbox is located on the Add Anthro window on the Medical screen. Selecting the Multi Fetal Flag checkbox will add WIC Code 335 Diagnosed Twins or Multiple Gestation to the client record. Selecting the checkbox also allows you to provide your client with food packages made especially for mothers with multiples.

10. Is birth data required for foster children?

    Sometimes, birth information for children in foster care isn't available, so these fields are not required for children who have the Foster Care checkbox selected on the Client Information screen. Emphasize that even though the information isn't required, staff should enter it if available.

11. When do you need to change the R (recumbent) and S (standing) button?

HANDS automatically selects the R, or recumbent height, button for all children under 24 months of age and the S, or standing height, button for children over 24 months.

In some cases, you may need to change the Recumbent or Standing information from the HANDS default when you add anthropometric information. For example, if you use a recumbent measurement for a 2½-year-old child that cannot stand without help, you'll need to change the S to an R. This ensures the most accurate data is recorded, and enables HANDS to display the appropriate growth charts for the client

12. Enter medical information and view the growth charts for each member of the family you created in Part 1:
    a. Baby (IPN, 10 months old):
        i. Birth data: 4 pounds, 3 ounces and 19 inches
        ii. Today's length: 28 and 6/8 inches
        iii. Today's weight: 21 pounds, 4 ounces
        iv. Hemoglobin: 12.5
        v. Why is hemoglobin needed for this infant?

        Facilitate a discussion about your Local Agency's policies and procedures for collecting hemoglobin for infants. Review the Arizona WIC Laboratory manual.

        vi. What graphs are appropriate for this client?

        WHO Weight-for-age
        WHO Length-for-age
        WHO Weight-for-length

    b. Child (C2):
        i. Today's height: 33 and 2/8 inches
        ii. Today's weight: 27 pounds, 5 ounces
        iii. Hemoglobin value of 9.2
        iv. What graphs are appropriate for this client?

        CDC Weight-for-age
        CDC Stature-for-age
        CDC BMI-for-age

c. Mom (PG2 16 weeks pregnant):
    i. Pre- Pregnancy Weight: 140 pounds
    ii. Today's height: 5 ft., 6 inches
    iii. Today's weight: 145
    iv. Hemoglobin: 13.1

13. What, if any, WIC Codes would you expect HANDS to assign based on this data?

    Baby: 141 Low birth weight infant (at or below 5.5 lbs) and 702 Infant being breastfed by a woman at nutritional risk

    Child: None

    Mom: None

14. View the Assessment screen for each family member to check the assigned codes.

TRAINING NOTES

MODULE 5: ASSESSMENT PART 2

TRAINEE'S STEPS:

Begin the LMS HANDS New Hire course. Please complete the following steps:

- ☐ If necessary, log back into: https://az.train.org/DesktopShell.aspx
- ☐ If necessary, re-open the HANDS New Hire LMS course
- ☐ Complete Module 5: Assessment Part 2
- ☐ Complete the HANDS New Hire Activity 5 either individually, with other trainees, or with your trainer
- ☐ Meet with your trainer to discuss Module 5 and HANDS New Hire Activity 5

TRAINER'S STEPS:

- ☐ Have the trainee complete Activity 5, either individually, or as a group with the other trainees. As the trainer, you may decide whether or not to be present while the trainee works on the activity.
- ☐ Once finished, the trainee shall meet with the trainer to review the answers to the activity. Please answer all questions the trainee may have, and clarify any incorrect answers.

HANDS NEW HIRE ACTIVITY 5

COMPETENCY:

1. Trainee demonstrates understanding of the Assessment screen.
2. Trainee can complete Assessments for a family.
3. Trainee is able to enter Breastfeeding Surveillance data for an infant.

ASSESSMENT

1. What are your Agency's policies and procedures for adding new assessments?

   A full assessment must be completed during every Certification and Mid-Certification visit.

   A breastfeeding assessment shall be conducted each appointment for a breastfeeding dyad or if there is a change in category or in feeding needs.

   Review Chapters 2 and 19 in the Arizona WIC Program Policy and Procedure Manual.

2. What tools do you have to assist you with completing a client assessment?

   Facilitate a discussion about assessment tools available in your Agency. Some tools include the Getting to the Heart of the Matter Tools (GTHM), Assessment Guide, WIC Code Cheat Sheets, HANDS Job Aids, your trainer/supervisor, and the HANDS training website.

3. What steps do you need to take before you save an assessment in order to ensure accuracy?

   Before saving the assessment, make sure you review everything you have completed. Double check your documentation, fix any incorrect data, and add anything you may have forgotten.

4. How can you connect with your client, while still collecting all of the assessment information you need?

   Facilitate a conversation on using PCS and OARS skills.

5. Complete an Assessment for each member of the family you created using the information below.

    a. What would be your opening question/approach for this family?

       Facilitate a conversation on how to approach clients when conducting an assessment. Topics could include GTHM Tools, OARS, and PCS skills.

    b. Baby:
        i. Information collected during the ABC(E) portion of the assessment:
            1. Mom states all was going well with baby, and although the baby was born early, he/she has "caught up" and is doing well. There are no other medical or E concerns.
        ii. Information collected during the D portion of the assessment:
            1. Mom's response to your opening question is that she feels breastfeeding is special to her, but since she's been pregnant, she's been more sensitive and nursing has been a bit painful. She enjoys the morning, nighttime and comfort nursing and doesn't want to stop those, but feels that she probably couldn't offer the breast anymore because of the sensitivity and pain. She nurses the baby about 3 times per day and has been offering about 9 ounces of Similac® Advance per day. She mixes the formula appropriately, 1 scoop per 2 ounces of water. She uses filtered tap water. She first offered the formula about 2 months ago.
            2. Her little one is eating solids well and feeding him/herself finger foods like puffs, avocado and soft foods. Eats meats (ground) ok, but is a bit pickier with these foods. Her pediatrician recently recommended Vitamin D drops, and she has started putting them in her baby's bottle. She does have some questions about cups and when she can start offering milk.
        iii. Child:
            1. Information collected during the ABC(E) portion of the assessment: Mom tells you that her 2-year-old has been healthy since birth and that the doctor has no concerns about weight or health. The doctor did recently suggest a multi-vitamin which she has started.
            2. Information collected during the D portion of the assessment: Mom says her 2-year-old is a picky eater, though fruit is always a

hit. Veggies are another story, though zucchini is a favorite. Is also a bit picky with meat, though meatballs and meats in sauces are generally eaten. They offer 1% milk a couple of times per day in a regular cup, and cheese is often a snack. They eat 3 meals per day plus 2 snacks and additional treats on occasion. She says that they try to eat family meals but that sometimes it is hard with her job schedule. She notices her 2-year-old does not eat as well when she's been away at work and always wants to sit on her lap.

iv. Mom:
   1. Information collected during the ABC(E) portion of the assessment:
      a. Mom tells you that she hasn't seen the doctor yet. She recently switched jobs and didn't have healthcare--though they just got on AHCCCS and have made an appointment. She feels her weight gain has been a little lower than her previous two pregnancies. She's been sick with this pregnancy, and she's been sick with all of them.
   2. Information collected during the D portion of the assessment:
      a. In addition to what she told you about nursing her baby, she tells you that she takes her prenatal though she has to take it at night. Sometimes she feels too sick to eat and has thrown up a few times. She knows not to eat certain foods that aren't cooked well and has stopped drinking caffeine. She'd like to be able to eat a little more because she was worried she wasn't gaining enough due to her sickness. She'd like to breastfeed her next baby as well, though she'd like her 10-month-old to wean soon.

v. What WIC Codes do <u>you</u> think apply for each family member?

   Baby: ______________________
   Child: ______________________
   Mom: ______________________

vi. What WIC Codes did HANDS assign?

BREASTFEEDING SURVEILLANCE

1. What is Initiation? Duration?

   Initiation means that a baby/child has breastfed and/or received breast milk. Duration is the length of time that the baby/child breastfed and/or was given breast milk.

2. Why is breastfeeding information collected?

   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.

3. When is Breastfeeding Surveillance information collected?

   Documenting breastfeeding information is required for each client who is less than 24 months of age. HANDS requires this information each time the client receives benefits, until he or she stops breastfeeding

4. Complete the Breastfeeding Surveillance screen for the baby using the information in the previous section.

TRAINING NOTES

MODULE 6: COMPLETING THE CERTIFICATION

TRAINEE'S STEPS:

Begin the LMS HANDS New Hire course. Please complete the following steps:

- ☐ If necessary, log back into: https://az.train.org/DesktopShell.aspx
- ☐ If necessary, re-open the HANDS New Hire LMS course
- ☐ Complete Module 6: Completing the Certification
- ☐ Complete the HANDS New Hire Activity 6 either individually, with other trainees, or with your trainer
- ☐ Meet with your trainer to discuss Module 6 and HANDS New Hire Activity 6

TRAINER'S STEPS:

- ☐ Have the trainee complete Activity 6, either individually, or as a group with the other trainees. As the trainer, you may decide whether or not to be present while the trainee works on the activity.
- ☐ Once finished, the trainee shall meet with the trainer to review the answers to the activity. Please answer all questions the trainee may have, and clarify any incorrect answers.

HANDS NEW HIRE ACTIVITY 6

COMPETENCY:

1. Trainee is able to complete the Care Plan.
2. Trainee can complete the Assessment process for a family.
3. Trainee demonstrates understanding of Notes, including Staff Alerts.

CARE PLAN

1. What are your Agency's policies and procedures for using the Active checkbox?

   The Active checkbox allows a staff member to designate whether, or not, a client's WIC Code is being actively followed. Facilitate a discussion about your Local Agency's policies and procedures for the Active Checkbox.

2. What are your Agency's policies and procedures for High Risk referrals?

   Facilitate a discussion about your Local Agency's policies and procedures for High Risk referrals. Review Chapter 7 in the Arizona WIC Program Policy and Procedure Manual.

3. Does your Agency use the Referral Organization field?

   Facilitate a discussion about your Local Agency's policies and procedures for the Referral Organization field.

4. How are the Referral and Income screens related?

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

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

5. Complete the Care Plan screens for each member of the family you created.
   a. What contact type would you document for this family?

      Certification Contact

   b. What referrals would you offer to this family?

Facilitate a discussion about referrals, including Mandatory Referrals, Local Agency Referral List, RD Referrals, and Breastfeeding Peer Counseling Programs.

6. Complete the Assessment process for each member of the family you created.

NOTES

1. Where can you add notes?

   Notes can be added using the Notes icon in Active Record, and on the Notes screen. The Note icon is available in most screens in the Certification Flow Menu, with the exception of the Family Information and Notes screens

2. Why are notes important?

   Refer to the Creating a Useful Note job aid.

   Why document?

   The primary purpose of documentation is to support the continuity and quality of care. This helps keep the client motivated and encouraged and allows them to connect with the WIC staff. It's this connection that allows us to provide the best care, tailored to the client's individual needs.

   A useful note communicates important information to all staff members, including the client's history, needs, and concerns, as well as items for follow-up. Documentation also records referrals which help with the client's continued care. There may be aspects of the client's care that need to be assigned to team members with specific skills, such as a Registered Dietitian (RD) or International Board Certified Lactation Consultant (IBCLC).

3. Who else might see your note?

Refer to the Creating a Useful Note job aid.

Who cares about your documentation?

Your documentation may be read by a number of different people, including:

- **Your coworkers and supervisors**
- **State and/or Federal auditors**
- **Quality improvement personnel**
- **Lawyers and judges**
- **WIC Participants**

4. When would you use the General Info Note Type?

   Possible responses: The Note Type field allows you to categorize your note based on the type of service you're providing. Some uses for the General Info Note Type include detailing special circumstances when certifying clients in outreach locations, recording information about breast pumps, documenting a change in Authorized Rep., and noting information when a client forgets documentation.

   Facilitate a discussion about your Local Agency's policies and procedures for using the General Info Note Type.

5. When would you use a Staff Alert Note Type?

   Possible responses: The Note Type field allows you to categorize your note based on the type of service you're providing. A Staff Alert Note Type is used to notify staff that something important needs to be communicated, for example, an item needs to be updated in the client's file. The Staff Alert Note is applied to all the clients within the family and an icon will appear in the active record next to the Family ID.

   Facilitate a discussion about your Local Agency's policies and procedures for using the Staff Alert Note Type.

6. What tools do you have to ensure your note is complete?

   Facilitate a discussion about the tools available in your Agency. Some tools include the Creating a Useful Note job aid, the TGIF Note template, your trainer/supervisor, and the HANDS training website.

7. Write a TGIF note for each member of the family you created.
    a. What nutrition education topics would you include in your notes? Why?

       Facilitate a conversation about nutrition education that would be applicable for each family member.

    b. What information would you include about the baby's food package?

       Facilitate a conversation about tailoring based on intake.

8. Review the notes below and answer the following questions.
    a. What do you need as a staff member for this note to be useful?
        i. Note 1

           Refer to the TGIF Note template and the Creating a Useful Note job aid. Facilitate a discussion with staff to gather thoughts on what is needed in a note to provide quality client care.

        ii. Note 2

           Refer to the TGIF Note template and the Creating a Useful Note job aid. Facilitate a discussion with staff to gather thoughts on what is needed in a note to provide quality client care.

        iii. Note 3

           Refer to the TGIF Note template and the Creating a Useful Note job aid. Facilitate a discussion with staff to gather thoughts on what is needed in a note to provide quality client care.

    b. How does this note provide continuity of care? Would you be have all of the information needed to follow-up with the client?
        i. Note 1

           Refer to the TGIF Note template and the Creating a Useful Note job aid. Facilitate a discussion with staff to gather thoughts on what information is helpful when seeing a client during subsequent visits.

ii. Note 2

Refer to the TGIF Note template and the Creating a Useful Note job aid. Facilitate a discussion with staff to gather thoughts on what information is helpful when seeing a client during subsequent visits.

iii. Note 3

Refer to the TGIF Note template and the Creating a Useful Note job aid. Facilitate a discussion with staff to gather thoughts on what information is helpful when seeing a client during subsequent visits.

c. What would you add to this note?
   i. Note 1

Refer to the TGIF Note template and the Creating a Useful Note job aid. Facilitate a discussion with staff on what items are required, helpful, and make a complete note.

ii. Note 2

Refer to the TGIF Note template and the Creating a Useful Note job aid. Facilitate a discussion with staff on what items are required, helpful, and make a complete note.

iii. Note 3

Refer to the TGIF Note template and the Creating a Useful Note job aid. Facilitate a discussion with staff on what items are required, helpful, and make a complete note.

d. What would you remove from this note?
   i. Note 1

Refer to the TGIF Note template and the Creating a Useful Note job aid. Facilitate a discussion with staff on what items are not needed or appropriate for a complete note.

ii. Note 2

Refer to the TGIF Note template and the Creating a Useful Note job aid. Facilitate a discussion with staff on what items are not needed or appropriate for a complete note.

iii. Note 3

Refer to the TGIF Note template and the Creating a Useful Note job aid. Facilitate a discussion with staff on what items are not needed or appropriate for a complete note.

e. What else would you do to improve this note?

i. Note 1

Refer to the TGIF Note template and the Creating a Useful Note job aid. Facilitate a discussion with staff to gather thoughts on what is needed in a note to provide quality client care. Possible discussion points include:

- **Check grammar and spelling before saving a note.**
- **Use proper punctuation.**
- **Keep your note clear and professional, with details that allow the next staff member to quickly pick up where you left off.**
- **Include information that is needed to explain nutrition education, referrals, and follow-up care.**
- **Capitalize when needed, for example, abbreviations and the beginning of sentences.**

ii. Note 2

Refer to the TGIF Note template and the Creating a Useful Note job aid. Facilitate a discussion with staff to gather thoughts on what is needed in a note to provide quality client care. Possible discussion points include:

- **Avoid using all capital letters.**
- **Remove TGIF Note template prompts.**
- **Make sure everything in your note is directly related to the client's nutrition or health status. Exclude information that doesn't relate to client care.**
- **Use proper punctuation.**
- **Stick to approved WIC and medical abbreviations that are familiar to other staff members.**
- **Keep your note clear and professional, with details that allow the next staff member to quickly pick up where you left off.**
- **Include information that is needed to explain nutrition education, referrals, and follow-up care.**

iii. Note 3

Refer to the TGIF Note template and the Creating a Useful Note job aid. Facilitate a discussion with staff to gather thoughts on what is needed in a note to provide quality client care. Possible discussion points include:

- **Avoid using all capital letters.**
- **Make sure everything in your note is directly related to the client's nutrition or health status. Exclude information that doesn't relate to client care.**
- **Use proper punctuation.**
- **Stick to approved WIC and medical abbreviations that are familiar to other staff members.**
- **Keep your note clear and professional, with details that allow the next staff member to quickly pick up where you left off.**
- **Include information that is needed to explain nutrition education, referrals, and follow-up care.**
- **Include important statements from the client and/or Authorized Representative. Designate these statements with quotation marks.**
- **Avoid noting your subjective comments or giving your own opinion of the client's statements, history, concerns, and needs.**

- **Use neutral statements that give specific information without being judgmental.**
- **Use statements that specifically describe client actions and maintain a formal voice.**
- **Focus on specific, relevant information. Give precise details without being overly wordy.**

Note 1

t; nut ed
g; to try to conintue to nurse
I; still trying to pump to praised mom for not giving up
F; to see rd

Note 2

1. T: USED FACES: UNSURE LOOK TOOL (IF USED). MOM/FAMILY FEELS SHE NEEDS TO UNPACK FROM MOVE SO SHE CAN CONCENTRATE ON COOKING HEALTHIER MEALS 2. G: MOM/FAMILY WILL UNPACK, THEN GET BACK TO COOKING 3. I: DISCUSSED 1/1 CHILDREN, TAKING PRENATALS, MOM HAS HIGH BLOOD SUGAR, DR. IS WATCHING, EATS LOTS OF CHIPS, DOES GET SOME F/V IN. NOT MUCH MILK AND FILTERED WATER MANUALLY ASSIGNED CODE(S) DUE TO BF FEELINGS: BOTTLE IS MORE CONVENIENT, LAST TIME HAD LATCH ON PROBLEMS, GOING TO WING IT WHEN TIME GET HER, ENCOURAGED HER TO TRY AGAIN. FOOD PACKAGE (TAILORING, SPECIAL NEEDS FOOD PACKAGE) BECAUSE 4. F: FOLLOW-UP ABOUT (REFERRALS MADE, TOPICS FOR NEXT TIME, NEXT APPT TYPE, ETC) HOW HEALTHIER EATING GOING AND BF IF HAD BABY.

Note 3

T= NONE NEEDED (WOW MOM IS TALKATIVE) G= I=THESE TWINS ARE DOING FANTASTIC! MOM IS SUPER HAPPY WITH THIER GROWTH. MOM STILL TAKING PNV DAILY. IS EATING A WELL BALANCED DIET AND DRINKING LOTS OF WATER. SHE FEELS VERY TIRED STILL, BUT SHE IS REALLY ROCKIN THIS 'MOM WITH TWINS BUSINESS' LIKE A CHAMP. BABIES WERE BORN EARLY. MASON WAS RELEASED FROM NICU, BUT MARLEE HAD TO STAY A BIT MORE. HAS HAD AN AIRWAY ISSUE. LIFE WAS TOO DIFFICULT TO CONTINUE OFFERING BMILK TO BOTH BABIES, THEY ARE NOW IFF. ONE HOME. ONE NICU. ANOTHER CHILD AT HOME. JUST TOO MUCH GOING ON. OLDER BROTHER IS

EXSTATIC TO HAVE THE BABIES TOO! MADDEN IS TAKING A DAILY VITAMIN, WE DISCUSSED HOW HE COULD BE TAKING ONE WITH IRON. LIKES TO EAT A VARIETY OF FOODS, INCLUDING YOGURT. F=MOM HGB AT NEXT APT AND BRING THE PUMP BACK ISSUED ONE MONTH BENEFITS PENDING APPROVAL OF FORMULA FORMS.

TRAINING NOTES

MODULE 7: APPOINTMENTS

TRAINEE'S STEPS:

Begin the LMS HANDS New Hire course. Please complete the following steps:

- ☐ If necessary, log back into: https://az.train.org/DesktopShell.aspx
- ☐ If necessary, re-open the HANDS New Hire LMS course
- ☐ Complete Module 7: Appointments
- ☐ Complete the HANDS New Hire Activity 7 either individually, with other trainees, or with your trainer
- ☐ Meet with your trainer to discuss Module 7 and HANDS New Hire Activity 7

TRAINER'S STEPS:

- ☐ Have the trainee complete Activity 7, either individually, or as a group with the other trainees. As the trainer, you may decide whether or not to be present while the trainee works on the activity.
- ☐ Once finished, the trainee shall meet with the trainer to review the answers to the activity. Please answer all questions the trainee may have, and clarify any incorrect answers.

HANDS NEW HIRE ACTIVITY 7

COMPETENCY:

1. Trainee demonstrates understanding of the Appointment Scheduling screens and functions.
2. Trainee is able to schedule clients for various types of appointments.
3. Trainee can reschedule and cancel appointments.

CLIENT SERVICES - APPOINTMENTS

1. What are your Agency's policies and procedures for scheduling appointments?

   Facilitate a discussion about your Local Agency's policies and procedures for scheduling appointments.

2. Does your Agency use the Check-in/Check-out feature?

   Facilitate a discussion about your Local Agency's policies and procedures for the Check-in/Check-out feature.

3. Does your Agency use Pending Services? How is this functionality helpful?

   Facilitate a discussion about your Local Agency's policies and procedures for Pending Services.

4. Why would you use the Appointments screen in Client Services instead of going to the Scheduling module?

   The screen in the Client Services has family specific information. You would use this screen if you wanted appointment information or to manage the appointments for clients within that particular family. It can also be used to search for appointments for clients who need a very specific appointment.

5. How do you sort items in the Appointment History section?

   Sort using the small arrows in the grid header.

6. View the Appointments screen for the family you created.
   a. Add a Pending Service for one of your clients.

b. Schedule an appointment for the family using the Find Appointment Availability function.

SCHEDULING - APPOINTMENT SHEET

1. What are your Agency's policies and procedures for scheduling time frames, i.e. the 10 and 20 day rules?

   Facilitate a discussion about the 10 and 20 day rule and its importance. The discussion may include:
   - **Service Timeframe: Within 10 days**
     - **Priority I pregnant women, infants under six (6) months of age, homeless, and migrants will be notified of their eligibility, ineligibility, or placement on a waiting list within ten (10) calendar days of the date of request for WIC services (see Appendix A for Waiting List Notification form).**
   - **Service Timeframe: Within 20 days**
     - **All other applicants requesting WIC services will be notified of their eligibility or ineligibility or placement on a waiting list within twenty (20) calendar days from the date of request for WIC services (see Appendix A for Waiting List Notification form).**
   - **Extension of Timetable**
   - **Missed Appointment Procedures**

   Review Chapter 2, Section A in the Arizona WIC Program Policy and Procedure Manual.

2. How does the 10 and 20 day rule functionality work in HANDS?

   If a user attempts to make an appointment outside of the guidelines, HANDS will display a message (see below), asking if the client refused an earlier appointment. If the user selects Yes in the Client Refused pick list, the appointment will be scheduled.

If the user selects No, HANDS will clear out the appointment information and the user will need to select a different appointment date/time.

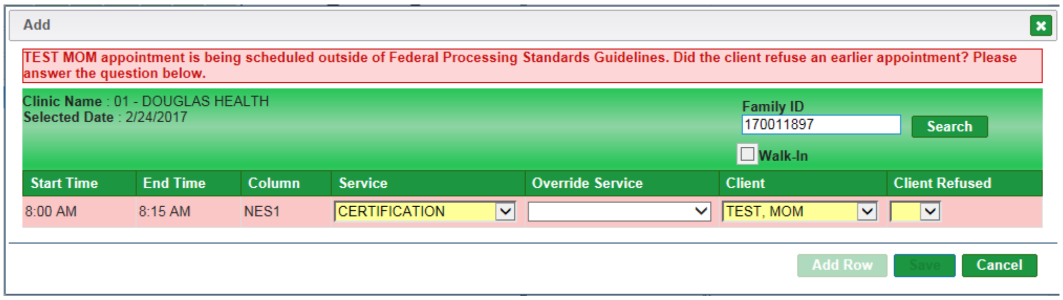

Figure 1 - Scheduling Module

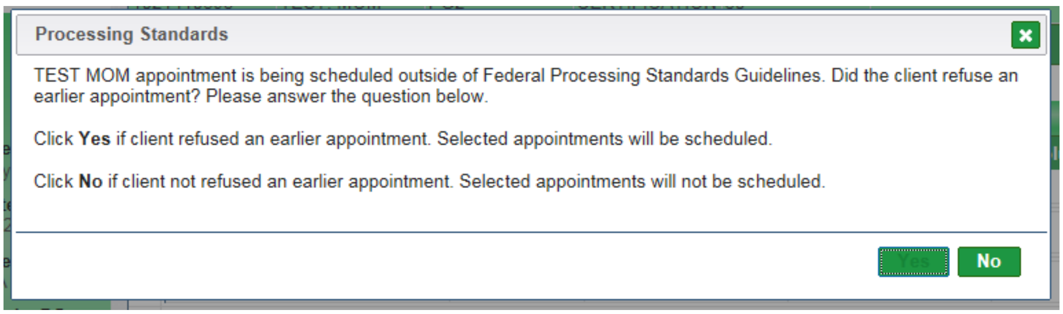

Figure 2 - WIC Services Module

3. What would you do if only two of three scheduled clients came in for an appointment?

   Deselect the client that is not present before checking in the family.

4. Do you have the Override role? If so, when would you use it?

   Facilitate a discussion about who has an Override role in your agency.

   Facilitate a discussion about when an override would be used or appropriate.

5. Describe the color-coding for appointment types. What does each color mean?

   Refer to the information icon on the Appointment Sheet screen in HANDS, which will list the appointment types and associated colors. Currently, for Arizona WIC, the colors are:

- **Red**
  - **High Risk**
  - **Medium Risk**
- **Brown**
  - **Certification**
- **Green**
  - **Breastfeeding Discussion**
  - **Groups**
  - **Health Check**
  - **Nutrition Discussion**
  - **Pregnant Discussion**
- **Blue**
  - **Everything Else**

6. How do you filter items in the Appointment Sheet? How do you use more than one filter?

   Above the appointment columns, you will see a pick list that says Filter Options and an empty field where data can be entered. This feature will allow you to sort through appointment options based on Column Names or Service Types. You can also use it to find an existing appointment based on Family ID. If you are entering more than one item in the filter field, you will need to separate the items by columns.

7. What is the Keep/Delete pop-up? How is it used?

   When a client has more than one appointment scheduled, a window will display asking whether to keep or delete the future appointments for the family (see below). Select Keep to keep all of the scheduled appointments. Select Delete to remove the appointments listed in the message window.

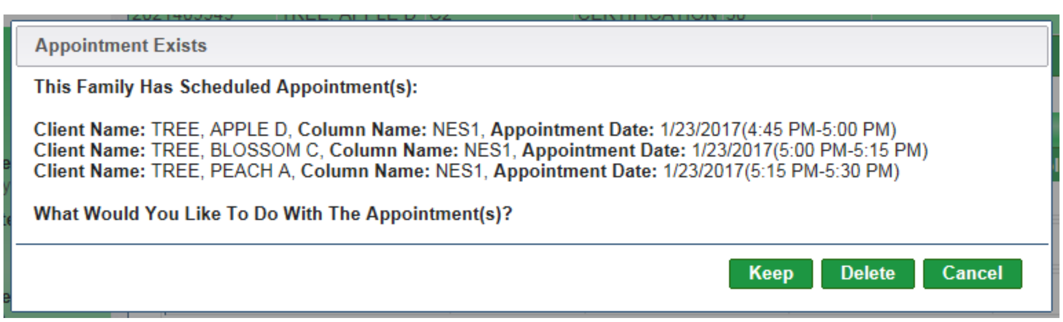

Figure 3 - Keep/Delete

7. What are your Agency's policies and procedures for recording walk-ins?

   Facilitate a discussion about your Local Agency's policies and procedures for walk-ins.

8. How do you view the Walk-in List?

   You will be able to search for and view walk-in information using the Walk-in Appointments menu item in the Scheduling module. This is helpful for viewing the daily walk-in list, and predicting high traffic days, times, and service types. It can also help with staffing and schedule planning.

   The Walk-In Appointments screen has the following Search fields:

   - **Family ID**
   - **Client ID**
   - **Date Range**

   After entering the search criteria, you will be able to view a list of walk-in clients' information.

9. Does your Agency use Appointment Mailing Labels? If so, what are the steps for creating labels?

   Facilitate a discussion aboutwhether or not your Agency uses Appointment Mailing Labels.

   Steps for creating labels are:

   - **Select Scheduling – Appt Mailing Labels from the Main Menu**
     - **Enter Search parameters:**
       - **Family ID**
       - **Client ID**
       - **Appointment From Date**
         - **Required**
       - **Appointment To Date**

            - **Required**
        - **Clinic**
            - **Required**
            - **Multi-Select pick list**
        - **Appointment Statuses**
            - **Multi-Select pick list**
        - **Categories**
            - **Multi-Select pick list**
        - **Services**
            - **Multi-Select pick list**
    - **Select Search**
    - **Select Print Labels**
    - **Select Label Type**
    - **Select Label start location**
        - **If you have a partially used sheet of labels, you can specify what label to start at**
    - **Select Preview Labels**
        - **Labels will display in a PDF previewer with a menu across the top:**
            - **Save**
            - **Print file**
                - **You have to print using this option or the Adobe Reader toolbar**
            - **Zoom out**
            - **Zoom in**
            - **Adobe Reader toolbar**
                - **This opens a whole new toolbar**
    - **Select OK to cancel and return to the main screen**

10. Use the family you created to practice using the Appointment Sheet.
    a. Practice searching for the family using the filter option on the screen.

    b. Schedule an appointment for each family member.

c. Practice rescheduling and canceling appointments.

d. Practice adding clients as walk-ins.

TRAINING NOTES

MODULE 8: PRECERTIFICATION

TRAINEE'S STEPS:

Begin the LMS HANDS New Hire course. Please complete the following steps:

- ☐ If necessary, log back into: https://az.train.org/DesktopShell.aspx
- ☐ If necessary, re-open the HANDS New Hire LMS course
- ☐ Complete Module 8: Precertification
- ☐ Complete the HANDS New Hire Activity 8 either individually, with other trainees, or with your trainer
- ☐ Meet with your trainer to discuss Module 8 and HANDS New Hire Activity 8

TRAINER'S STEPS:

- ☐ Have the trainee complete Activity 8, either individually, or as a group with the other trainees. As the trainer, you may decide whether or not to be present while the trainee works on the activity.
- ☐ Once finished, the trainee shall meet with the trainer to review the answers to the activity. Please answer all questions the trainee may have, and clarify any incorrect answers.

HANDS NEW HIRE ACTIVITY 8

COMPETENCY:

1. Trainee demonstrates understanding of the Precertification process.
2. Trainee is able to pre-certify a client.

PRECERTIFICATION

1. What are your Agency's policies and procedures for using the Precertification process?

   Facilitate a discussion about your Local Agency's policies and procedures for Precertification.

2. Why would you pre-certify a client?

   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.

3. Practice pre-certifying clients using the Precertification screens.

4. Practice creating appointments for the clients you pre-certify.

TRAINING NOTES

MODULE 9: TRANSFERS

TRAINEE'S STEPS:

Begin the LMS HANDS New Hire course. Please complete the following steps:

- ☐ If necessary, log back into: https://az.train.org/DesktopShell.aspx
- ☐ If necessary, re-open the HANDS New Hire LMS course
- ☐ Complete Module 9: Transfers
- ☐ Complete the HANDS New Hire Activity 9 either individually, with other trainees, or with your trainer
- ☐ Meet with your trainer to discuss Module 9 and HANDS New Hire Activity 9

TRAINER'S STEPS:

- ☐ Have the trainee complete Activity 9, either individually, or as a group with the other trainees. As the trainer, you may decide whether or not to be present while the trainee works on the activity.
- ☐ Once finished, the trainee shall meet with the trainer to review the answers to the activity. Please answer all questions the trainee may have, and clarify any incorrect answers.

HANDS NEW HIRE ACTIVITY 9

COMPETENCY:

1. Trainee demonstrates understanding of transfer processes.
2. Trainee can perform both In and Out-of-state Transfers.

IN-STATE TRANSFER

1. What are your Agency's policies and procedures for in-state transfers?

   Facilitate a discussion about your Local Agency's policies and procedures for in-state transfers. Review Chapter 2, Section R in the Arizona WIC Program Policy and Procedure Manual.

2. How do you transfer a single client? When might you need to transfer a single client?

   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.

   Facilitate a discussion about when you may need to transfer a single client. One example is when a Foster Child moves to a new home.

3. How do you transfer an entire family?

   Search for the family you wish to transfer using the process 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.

4. Practice in-state transfers for both clients and families.

OUT OF STATE TRANSFER

1. What are your Agency's policies and procedures for out-of-state transfers?

Facilitate a discussion about your Local Agency's policies and procedures for out-of-state transfers. Review Chapter 2, Section R in the Arizona WIC Program Policy and Procedure Manual.

2. What documentation do you need to perform an out-of-state transfer?

   You need either the VOC, or the Participant Profile Report information before you process an Out-of-State Transfer.

3. What format is used for the Verification of Certification (VOC) number?

   For the unique VOC number in the Transfer screen, use the 2-letter state abbreviation followed by the unique identifier on the actual VOC. If there is no unique identifier on the VOC, use the state abbreviation followed by the client or family ID that is provided on the VOC.

4. How do you perform an out-of-state transfer for a participant who is returning to your Agency?

   Search for the family you wish to transfer using the process 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 Our of State Trans button.

5. What additional services or referrals could be useful for someone who has just moved to your area?

   Facilitate a discussion about local referrals and programs available in your area. These might include food co-ops, farmers' markets, grocery stores, etc.

6. Practice transferring clients using the Out of State Transfer screens.

TRAINING NOTES

MODULE 10: BREAST PUMP ISSUANCE AND RETURN

TRAINEE'S STEPS:

Begin the LMS HANDS New Hire course. Please complete the following steps:

- ☐ If necessary, log back into: https://az.train.org/DesktopShell.aspx
- ☐ If necessary, re-open the HANDS New Hire LMS course
- ☐ Complete Module 10: Breast Pump Issuance and Return
- ☐ Complete the HANDS New Hire Activity 10 either individually, with other trainees, or with your trainer
- ☐ Meet with your trainer to discuss Module 10 and HANDS New Hire Activity 10

TRAINER'S STEPS:

- ☐ Have the trainee complete Activity 10, either individually, or as a group with the other trainees. As the trainer, you may decide whether or not to be present while the trainee works on the activity.
- ☐ Once finished, the trainee shall meet with the trainer to review the answers to the activity. Please answer all questions the trainee may have, and clarify any incorrect answers.

HANDS NEW HIRE ACTIVITY 10

COMPETENCY:

1. Trainee demonstrates understanding of the Breast Pump Issuance and Return screen.
2. Trainee can issue and return breast pumps.

BREAST PUMP ISSUE AND RETURN

1. What are your Agency's policies and procedures for issuing a breast pump?

   Facilitate a discussion about your Local Agency's policies and procedures for issuing a breast pump.

   A breastfeeding assessment shall be conducted each appointment for a breastfeeding dyad or if there is a change in category or in feeding needs.

   Review Chapter 19 in the Arizona WIC Program Policy and Procedure Manual.

   These steps should be followed when issuing a hospital-grade breast pump:

   1. **Retrieve breast pump and kit from inventory.**
   2. **Verify the breast pump serial number is in the HANDS inventory.**
   3. **Verify that the pump is in working order.**
   4. **Demonstrate how to assemble the breast pump.**
   5. **Discuss how to maintain an adequate milk supply.**
   6. **Review milk storage guidelines.**
   7. **Discuss directions for cleaning the breast pump.**
   8. **Print the Pump Release Form from the client file. Review "Hospital-grade Breast Pump Release Form" (Appendix B).**
   9. **Obtain signature and initials from participant and scan the document to be saved in the participant's HANDS file.**
   10. **Mark the pump as 'Issued' in the participant file and select the appropriate 'Return Date.'**
   11. **Document in the Notes Screen of HANDS in TGIF format.**
   12. **Verify the 'pump issued' icon is now displayed in the active record with the current pump due date.**

   Note: The pump icon is only activated when a pump is Issued, or when the status is changed from Issued to Letter Sent.

Note: Best practice is to follow-up with participants who have received a hospital-grade breast pump from WIC within a 24-hour period. This follow-up contact is to assure that the pump is operating correctly and that the mother is using it properly without concerns.

2. Which clients are eligible to receive a breast pump?

   Facilitate a discussion about your Local Agency's policies and procedures for breast pump eligibility.

   A breastfeeding assessment shall be conducted each appointment for a breastfeeding dyad or if there is a change in category or in feeding needs.

   Review Chapter 19 in the Arizona WIC Program Policy and Procedure Manual.

3. What are your Agency's policies and procedures for returning a breast pump?

   Facilitate a discussion about your Local Agency's policies and procedures for returning a breast pump.

   Review Chapter 19 in the Arizona WIC Program Policy and Procedure Manual.

   These steps shall be followed when a participant returns a loaned hospital-grade pump:
   1. **In the participant file, update the status in the Breast Pump Issuance and Return Screen as Returned.**
   2. **Verify that the pump icon in the active record is deactivated.**
   3. **Fill out the Breast Pump Receipt for Return of Hospital-Grade Double Electric Breast Pump. Remove the white copy (top) scan and save in the clients file in HANDS; the participant receives the pink copy (2nd copy), leave the remaining yellow copy (3rd copy) in the receipt booklet (Appendix B).**
   4. **Follow the appropriate cleaning procedure for all pumps.**
   5. **Update the status to Available when the pump is ready to be returned to current clinic inventory.**

6. What are your Agency's policies and procedures for changing a pump Status?

Facilitate a discussion about your Local Agency's policies and procedures for changing the status of a breast pump.

Review Chapter 19 in the Arizona WIC Program Policy and Procedure Manual.

7. Why is it important to double-check that the pump serial number on the case matches the serial number on the pump itself?

   Sometimes a pump can be placed in the wrong case after cleaning. Verifying serial numbers ensure accurate inventory and assignment of pumps.

8. Why is it important to double-check that the serial number on the pump matches the serial number in HANDS?

   Verifying the serial number ensures accurate assignment and tracking of pumps.

9. What education would you provide to a client when you issue a pump?

   Facilitate a discussion about the education given to a client when issuing a pump. Possible topics include: pump assembly; pump cleaning, and breast milk storage. Review information provided in the two-day WIC Breastfeeding training.

10. What referrals would you offer a client when you issue a pump?

    Facilitate a discussion about the importance of referrals to internal and external resources. Possible referrals include: breastfeeding peer counseling, Arizona 24-Hour Pregnancy and Breastfeeding Hotline, and your Local Agency Referral List.

    Review Chapter 19 in the Arizona WIC Program Policy and Procedure Manual.

11. What steps would you follow if your client needs to extend their pump due date?

    Facilitate a discussion about your Local Agency's policies and procedures for returning a breast pump.

    Review Chapter 19 in the Arizona WIC Program Policy and Procedure Manual.

    Length of issuance shall not exceed three months or 90 days.

The participant may keep the breast pump after the Date of Return if desired; a new Hospital-Grade Breast Pump Release Form shall be completed with a signature. The new document shall be scanned into the participant's HANDS file. In the Breast Pump Issuance and Return Screen, update the Reissued Due Date.

Note: The participant does not need to bring the breast pump into the clinic in order to complete the form.

Note: If the client is certifying and has forgotten documentation at the time of pump issuance, the WIC staff shall only issue the hospital-grade pump for a one-month period to coincide with the 30-day 'forgotten documentation' grace period.

12. What breast pump information is located in Active Record?

    When a pump is issued to a client, the Breast Pump icon will appear in active record. The hover information for the icon will list the breast pump due date.

    Note: If the client has more than one breast pump issued, it will only list the due date that is farthest in the future

13. Practice issuing and returning a breast pump.

TRAINING NOTES

Competency Achievement Checklist / HANDS New Hire Part 2

Trainee's Name ______________________

Local Agency ______________________

Competency Achievement Checklist **HANDS New Hire Curriculum**			
At This Checkpoint:	**Evaluate This:**	**Competency Achievement Date**	**Initials**
LMS Pre-test	Trainee completed the LMS Pre-test.		
Learning Activities	Trainee accurately *completed* all activities specified for this course.		
	All activities were *discussed* with the trainee and reviewed for accuracy.		
Competencies	Trainee can identify the sections of the Medical screens.		
	Trainee is able to document anthropometric and blood work data in HANDS.		
	Trainee understands how to utilize Weight Gain Grids and Growth Charts.		
	Trainee demonstrates understanding of the Assessment screen.		
	Trainee can complete Assessments for a family.		
	Trainee is able to enter Breastfeeding Surveillance data for an infant.		
	Trainee is able to complete the Care Plan.		
	Trainee can complete the Assessment process for a family.		
Competencies, Continued	Trainee demonstrates understanding of Notes, including Staff Alerts.		
	Trainee demonstrates		

	understanding of the Appointment Scheduling screens and functions.		
	Trainee is able to schedule clients for various types of appointments.		
	Trainee can reschedule and cancel appointments.		
	Trainee demonstrates understanding of the pre-certification process.		
	Trainee is able to pre-certify a family.		
	Trainee demonstrates understanding of transfer processes.		
	Trainee can perform both In and Out-of-State Transfers.		
	Trainee demonstrates understanding of the Breast Pump Issuance and Return screen.		
	Trainee can issue and return breast pumps.		
LMS Post-test	Trainee has achieved a score of 80% or better.		

I verify ____ has achieved the learning objectives of the *HANDS New Hire LMS Course* and is competent to continue with WIC training.
The trainee meets the criteria set by the State to receive a *Certificate of Completion* for this course.

Trainer(s) Signature _____________________________________
Date______________________

File this signed competency achievement checklist in the appropriate employee training file, in accordance with WIC policy.