

Transfers

This module applies to the following security roles:

Clerk
RN/RD



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September 2013



This module requires use of the computer and the on-line KWIC Training Application.

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Objectives

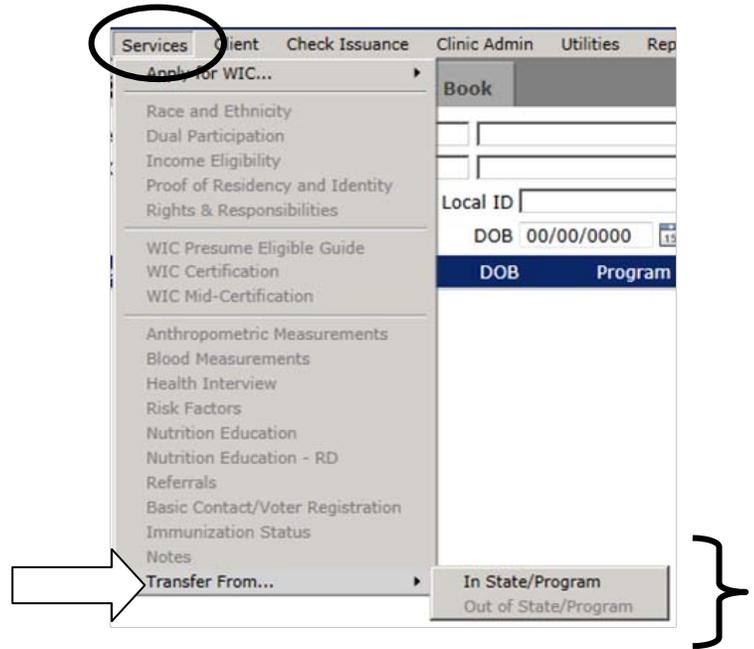
Upon completion of this activity, the employee will be able to:

1. Transfer a client into the clinic from another Kansas WIC Clinic.
2. Transfer a client into the clinic from a WIC clinic outside of Kansas
3. Issue a Verification of Certification (VOC) card to enable a client to transfer from Kansas to a WIC clinic outside of Kansas.
4. Void a VOC card.

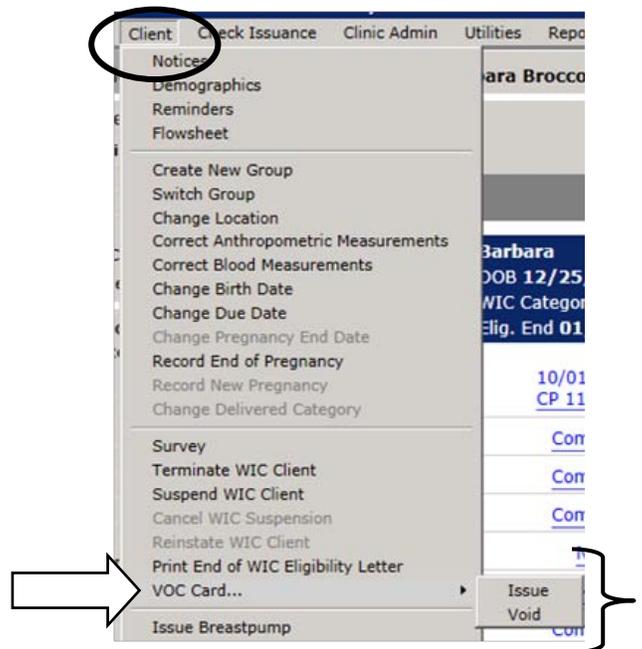
Introduction

KWIC has two windows located on the Services menu that are used to transfer clients into a Kansas clinic:

- **Transfer From - In State/Program** – used to transfer a client’s history and current certification information from one Kansas clinic to another Kansas clinic.
- **Transfer From - Out of State/Program** – used to transfer in clients that are in a current certification from out-of-state.



KWIC has windows (**VOC Card – Issue**) located on the Client menu related to the Verification of Certification (VOC) card for active clients who are moving from Kansas to another state.



Reading Assignment:
 For information about transfer policies, go to the KDHE Nutrition and WIC web-site at [http://www.kdheks.gov/nws-wic/PPM Table of Contents.htm](http://www.kdheks.gov/nws-wic/PPM_Table_of_Contents.htm) . The transfer polices are found in the Certification section. Review all the transfer policies, starting with CRT 10.00.00 and ending with CRT 10.05.00.

Transfer From - In State/Program



The **Transfer From - In State/Program** window is used to transfer a client's history and current certification information from one Kansas clinic to another Kansas clinic. Each client's historical record is maintained through each move. This gives clinic staff easy access to the client's WIC history and allows them to better serve the client.

You will use this window when someone walks into your clinic and says, "I was on WIC at XYZ in Kansas and now I live here and want to be on WIC." In fact, when any client comes in and asks for services in your clinic, you should question them to see if they (or any member of the family group) have ever been on WIC in Kansas.

It is critical that you transfer a record if one exists. If you start a new KWIC record for the client and later learn there is another record, **there is no way to combine the records.** If you mistakenly start a second record for a client, call the Help Desk immediately.

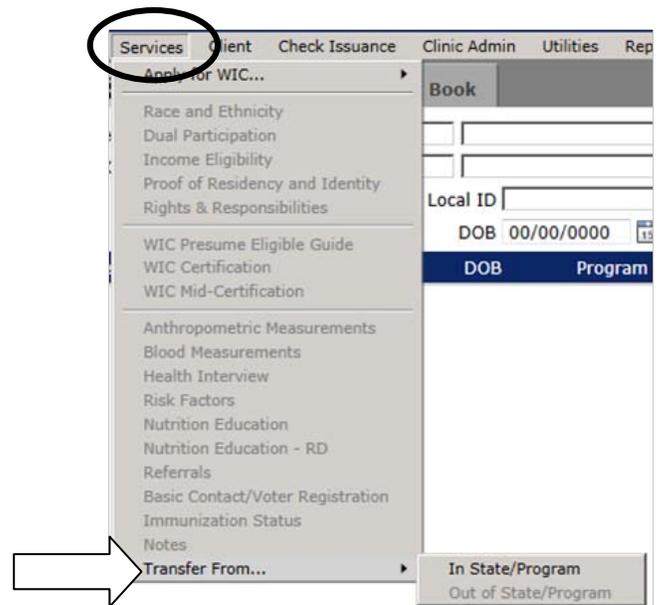


Note about the training environment. To complete a Transfer From - In State/Program you need a client from another Kansas local agency other than your local agency. This is difficult to simulate in the training database so in most of this section you will just read the module and look at screen shots instead of "clicking along" in KWIC.

There are three scenarios when you are transferring clients from another Kansas clinic:

- Transfer the whole group.
- Transfer selected clients from the group to an existing group in your caseload.
- Transfer selected clients from the group in your caseload and make them a new group.
- Go to the **Services** drop-down menu and select **Transfer From - In State/Program**.

You can tell there are more choices for "Transfer From" because there is a little arrow pointing to the right. To see the other choices of "Transfer From", use your mouse to "hover" the cursor over "Transfer From" and the two choices will appear on the right.



- Click on **In State/Program**.

The Transfer from Within Program window opens. It is similar to Find Client but also has a Clinic field that you can use if you know it.

The screenshot shows the 'Transfer From In State Program' window with the following fields:

- Caregiver Last Name: [] []
- Client Last Name: [] []
- Client ID: [] Local ID: []
- Category: [] DOB: 00/00/0000 [15]
- Clinic: []
- Display Inactive Groups

Buttons: Find Client, Appointment Book, Transfer From In State Program

- Use the search fields to find the **Onion family – Olivia and Otto**. (Clicking **[Find]** will display search results.)

Important Note: If the highlighted client is already being served by your local agency a message will display in red at the bottom left of the screen. You cannot transfer in a family already in your database. If you see this message, close the Transfer Group from Within Program window and use Find Client to retrieve the client’s record from your clinic.

The screenshot shows the search results for the Onion family. The table below is highlighted with a red box:

Caregiver	Client	DOB	Program	Status	Cat	Eligibility Ends	Clinic
Onion, Olivia	Onion, Olivia	11/06/1987	WIC	Applicant	PG		Butler County WIC Clinic
	Onion, Otto	05/07/2011	WIC	Active	C	12/31/2013	

Below the table, the client details for Olivia are shown:

- WIC Information:** Client ID 10358832, Olivia Onion, Due Date 1/19/2014, WIC Eligibility Applicant, No Checks Issued.
- Group Information:** Caregiver Last Name Onion, First Name Olivia MI, Alternate Last Name, First Name MI, Telephone, Message Telephone, Telephone Notes, Street Address 1232 Cantaloupe Circle, Mailing Address, El Dorado KS 67042 Butler, Special Needs, Primary Language, Interpreter, Migrant Homeless.

A red warning message is displayed at the bottom left: **Family is Already in This Caseload - No Transfer**. Navigation buttons at the bottom include <<< Back, Next >>>, Save, and Cancel.

Olivia and Otto are already in your clinic! Click [**Cancel**] to exit this window.

Because of the problem in transferring clients in the training environment, just read from here forward and look at the screen shots in the module.
Do not try to click along in KWIC.

Assuming that you found the client who was transferring into your clinic...Review the information displayed to ensure you are selecting the correct group to transfer and then **click the [Next] button found at the bottom of the window.**

The second screen in Transfer From In State/Program window opens. On this window the user makes selections to indicate if the **whole group** or **part of the group** is transferring.

For training purposes, we will walk through each of these options individually. In this example, we're transferring Sandi Fry from another Kansas clinic.

The screenshot shows a software window titled "Transfer From In State Program". At the top, there are tabs for "Find Client", "Appointment Book", and "Izamar N Kinslow Group". The main area contains search fields for "Caregiver Last Name" (fry), "Client Last Name", "Client ID", "Local ID", "Category", "DOB" (00/00/0000), and "Clinic". There are also fields for "First Name" (Sandi) and a "Display Inactive Groups" checkbox. A "Find" button is at the bottom right of the search area.

Caregiver	Client	DOB	Program	Status	Cat	Eligibility Ends	Clinic
Fry BFPC, Sandi	Fry BFPC, Sandi	04/16/1992	WIC	Active	PG	11/30/2013	Butler County WIC Clinic

Below the table, there are two main sections: "WIC Information" and "Group Information".

WIC Information:
Client ID **10358969**
Sandi Fry BFPC
Due Date **9/29/2013**
WIC Eligibility **09/09/2013 to 11/30/2013**
Last Issued **09/09/2013**
First Use Date **09/09/2013**
Pregnant or Mostly BF

Group Information:
Caregiver Last Name **Fry BFPC** First Name **Sandi** MI
Alternate Last Name First Name MI
Telephone **(785)123-4566** Message Telephone Telephone Notes
Street Address **123 Apple Lane** Mailing Address
Sabetha KS
Nemaha
Special Needs Migrant Homeless
Primary Language **English** Interpreter

At the bottom of the window, there are navigation buttons: "<<< Back", "Next >>>", "Save", and "Cancel".

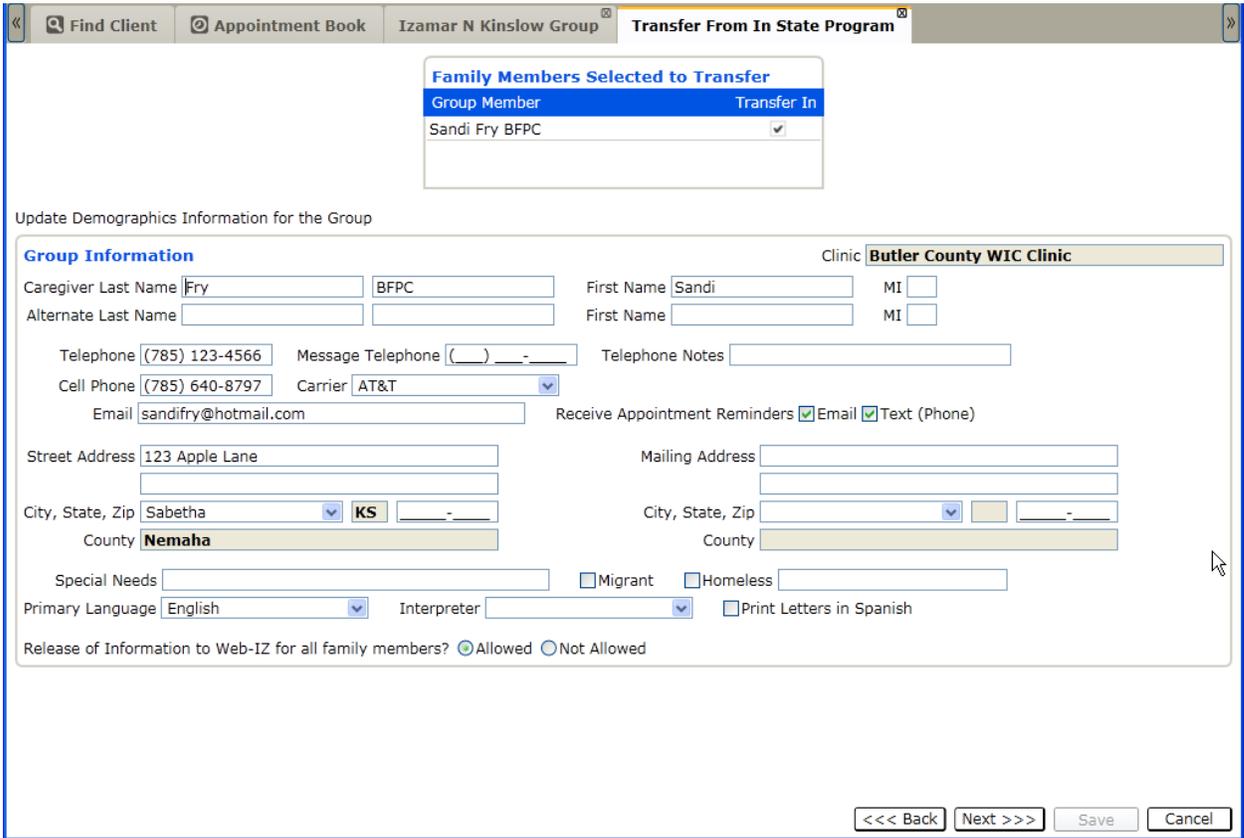
Scenario #1: All the members of a group are transferring to your clinic.

Click the [Next] button to open this window.

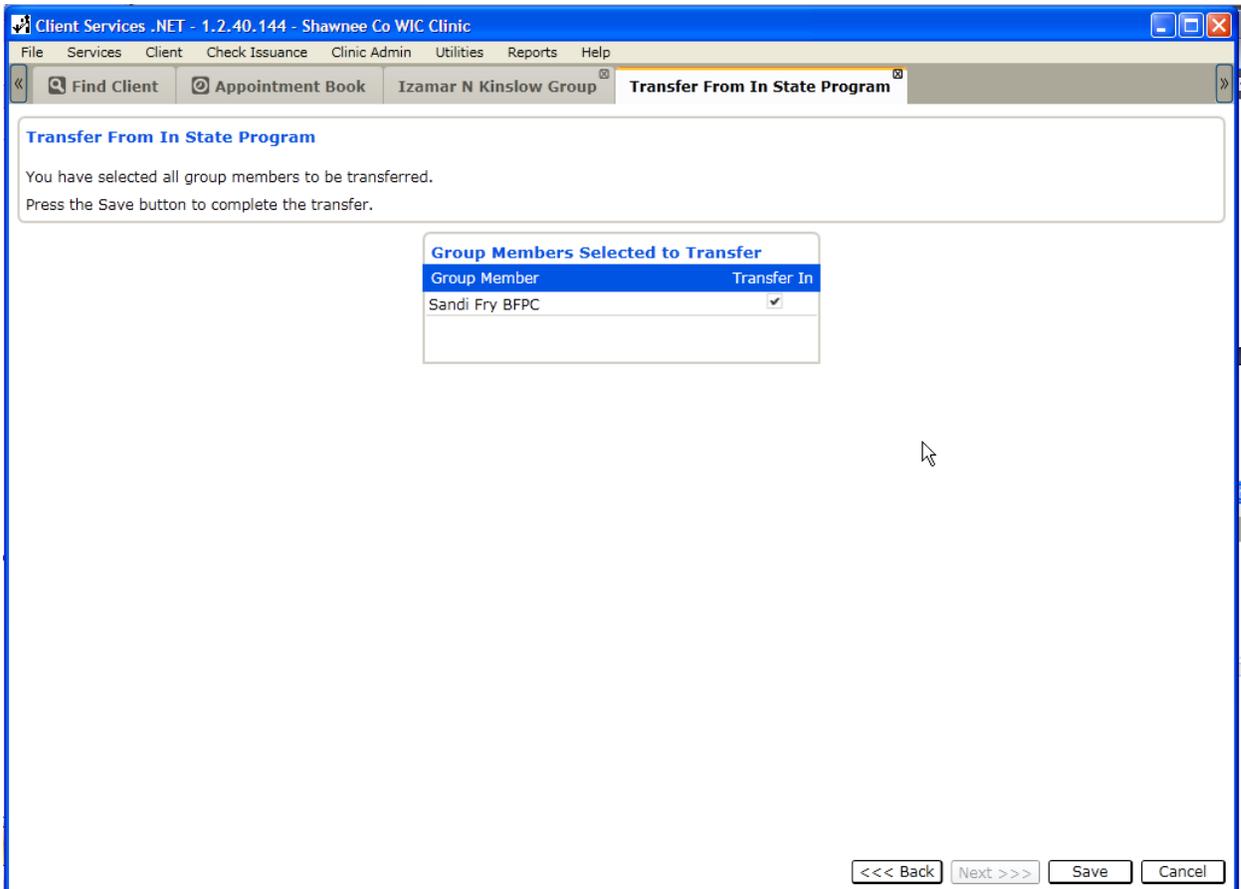
The default option on this window is **Transfer Whole Group**. When Transfer Whole Group is selected, all members of the group are transferred to your clinic. By default, all members of the group are listed in the Group Member box and the **Transfer In** checkbox associated with each group is checked.



Click the [Next] button. This screen is used to update the group’s demographic information. The information displayed is their demographic information from the clinic they are transferring from so you’ll need to update it.



Click the [Next] button. The final window in Transfer From - In State/Program opens. Read the information and confirm that you are correct. Click the [Save] button to complete the transfer the group into your database,



Scenario #2: Selected members of the group want to transfer to an existing group in your clinic.

(The following screen shots look slightly different from the current KWIC version.) This screen was already shown in Scenario #1. Now we'll consider it from Scenario #2.

Transfer Selected Clients into an Existing Group. When you use this option, the checkboxes associated with each group member automatically become “unchecked.” The “Existing Group” means an existing group in your clinic. For instance, a

Select the Combination of Group Members

Transfer Whole Group
 Transfer Selected Clients into an Existing Group
 Transfer Selected Clients into a New Group

Group Member	Transfer In
Ellen Play	<input type="checkbox"/>
Leroy Play	<input type="checkbox"/>

child is changing custody when moving from one county to another. Their new caregiver is already a caregiver with a group in your clinic.

Select the Combination of Group Members

Transfer Whole Group
 Transfer Selected Clients into an Existing Group
 Transfer Selected Clients into a New Group

Group Member	Transfer In
Ellen Play	<input type="checkbox"/>
Leroy Play	<input checked="" type="checkbox"/>

Check the Transfer In checkbox for each group member who is transferring into your clinic.

Click the [Next] button. A window opens to let you find the group in your clinic to which the client(s) are joining.

If there are multiple rows in the search results box be sure you have the correct family group highlighted. As in Scenario #1, click the [Next] button to open the final window in Transfer From - In State/Program. Read the information and confirm that you are correct and save.

Scenario #3: Selected members of the group want to transfer to a new group in your clinic.

Remember this from the screen already shown in Scenario #1 and #2? Now we'll consider it from Scenario #3.

Select Transfer Selected Clients into a New Group.

When you use this option, the checkboxes associated with each group member automatically become "un-checked." Notice that the checkboxes associated with each group member automatically become "un-checked."

Select the Combination of Group Members

Transfer Whole Group
 Transfer Selected Clients into an Existing Group
 Transfer Selected Clients into a New Group

Group Member	Transfer In
Ellen Play	<input type="checkbox"/>
Leroy Play	<input type="checkbox"/>

Check the Transfer In checkbox for each group member who is transferring into your clinic.

Select the Combination of Group Members

Transfer Whole Group
 Transfer Selected Clients into an Existing Group
 Transfer Selected Clients into a New Group

Group Member	Transfer In
Ellen Play	<input type="checkbox"/>
Leroy Play	<input checked="" type="checkbox"/>

Click the [Next] button. This next screen is used to enter the new group's demographic information.

You must enter a Caregiver's name and a Primary Language to move on to the next window. Although it is best to fill out as much information now as possible, the rest can be completed later using the Demographics tab.

As in Scenario #1 and #2, click the [Next] button to open the final window in Transfer From - In State/Program. Read the information and confirm that you are correct and save.

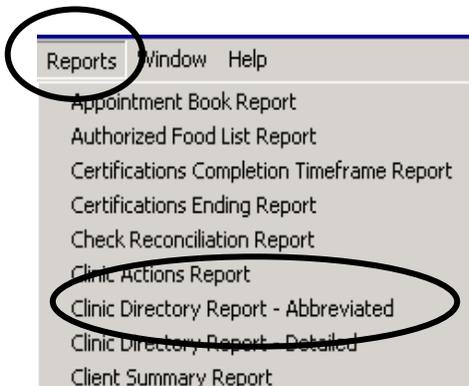
When you transfer a client to your clinic from another clinic, the client will show up in the former clinic when "Find Client" is used, but the status will be Transferred.

.....

What do I do when a client wants to transfer out of our clinic to another clinic in Kansas?



Review policy CRT 10.01.00 In-state Transfer. You do not have to do anything with their record. Simply refer the client to the WIC clinic in their new area.



Go to the Reports drop-down menu and open **Clinic Directory Report – Abbreviated**. Locate the new clinic and click the [Generate] button to display the report. This report provides basic information such as address, telephone, and business hours. If desired, you can click the [Print] button and hand it to the client.

Clinic Directory Report - Abbreviated			
City	Atchison	Generate	Clear
County		Print	
Zip	(5 digit zip code)		

Kansas WIC Program

Clinic Directory Report - Abbreviated

Agency: NEK-Multi County WIC Agency

Atchison County WIC Clinic
 616 Commercial, Atchison, KS 66002
 Hours of Operation: Tu: 08:30-03:30

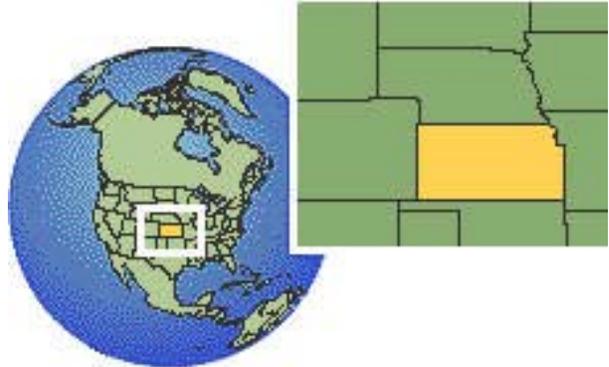
(913) 367-5152

Reminder: The information on the Clinic Directory Reports is taken from information that a clinic staff enters into KWIC using the **Clinic Admin/Clinic Directory** window. It is important to keep that information for your clinic current so others have the right information when they make a referral to your clinic.

Transfer From – Out of State/Program

The **Transfer From - Out of State/Program** window is a guide is used to transfer in clients that are in a current certification from an out-of-state WIC Program. The guide allows you to quickly enter required information so the client can receive checks.

Review policy [CRT 10.03.00 WIC Out-of-State Verification of Certification Card Acceptance](#) that you were assigned to read at the first of this module.



As described in the policy, the client must present a current Verification of Certification (VOC) Card from an out-of-state WIC Program. “Current” means that the client is still within the certification period shown on the VOC card. If a client does not have a VOC Card, but claims to be in a current certification in an out-of-state WIC program, clinic staff are allowed, but not required, to try to get sufficient information by telephone.

WIC clinic staff will certify the client, instead of transferring, if the:

- Certification period on the VOC Card has expired, or
- Client does not have a VOC Card, and it is unreasonable or impossible for staff to contact the original clinic to get current certification information.

Before you use the Transfer From - Out of State/Program guide, you need to learn if there is an existing Kansas WIC record in your clinic or in another Kansas clinic. Remember that all the Kansas WIC records should stay with the client.

It is critical that you transfer a record if one exists in another Kansas clinic. If you start a new KWIC record for the client and later learn there is another record, **there is no way to combine the records.** If you mistakenly start a second record for a client, call the Help Desk

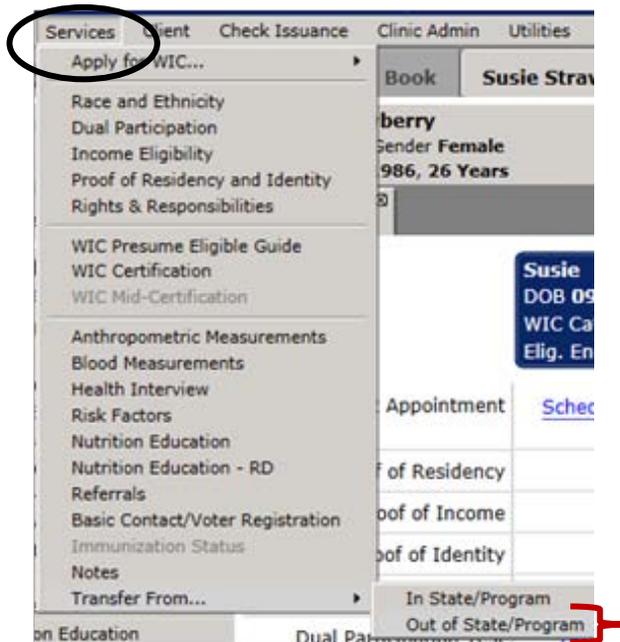
1. Establish a KWIC record in your clinic. (This part can be done in person or over the telephone.) Ask if the client has ever been on WIC before in Kansas, using the current name or under a different name.
 - a. If yes, the client was on Kansas WIC...
 - ◆ **In your clinic**, but transferred to another state, the client’s record should be in your clinic, with a status of Terminated. You should be able to find them in your clinic using the Find Client window. By default, KWIC marks the Display Inactive Groups checkbox to display the records of inactive client groups (all of the clients in the group have a Terminated status older than 90

days). If you find them, you know that you have their record in your clinic and can add to it.

- ◆ **In a different Kansas clinic**, use the Transfer From - In State/Program to transfer a client's history into your clinic as described earlier in this module. As you have already learned, you'll have to determine if they are joining an existing group in your clinic, or will be in a new group and proceed in KWIC accordingly.
- b. If no, the client was never on WIC in Kansas, you need to use the Apply for WIC window to start a Kansas WIC record as described in the Apply for WIC module.
- ◆ Use **Apply for WIC – Create a New Group** – select if the transferring client is new to your clinic and is not a member of a group currently being served by your clinic. Add the new client information and **Save** to create a client record in KWIC.
 - ◆ Use **Apply for WIC – Add New Client to an Existing Group** – select to add the transferring client as a member of a group currently being served by your clinic.
- c. If the client has walked into the office with a current VOC card, it is best if you can complete the transfer immediately. (It is very quick.) If you have completed Step 1 over the telephone, make an appointment for the client to come to clinic and complete the transfer. Infants/children do not have to be present for the transfer as long as the caregiver has a current VOC card for each person.

2. Retrieve the client record. Then you can **select Services / Transfer From – Out of State/Program**.
3. The Transfer From–Out of State/Program Guide opens.

Use the guide to complete transfer of the client's current certification into your clinic. (You must take this information directly from the VOC card or the clinic in the other state. *Do not just take verbal information from the client.*)



Transfer from Out of State for Susie Strawberry.

You have started recording VOC information for Susie Strawberry.

To complete the certification, click on and complete each task labeled 'Needed' in the list below.

Race and Ethnicity	Needed
✓ Dual Participation Test	Completed 09/16/2013
Proof of Residency	Needed
Proof of ID	Needed
Anthropometric Measurement	Needed
Blood Measurement	Needed
Health Interview	Needed
Assess Risk Factors	Needed
Nutrition Education	Needed
Referrals	Needed
Voter Registration	Needed
Complete Transfer In From Out of State	Needed

Even though all links display as “Needed”, only some are required. You can add information to others if you have it, or have new information.

See text for a list of required fields.

4. The Transfer from Out of State Guide contains a full list of links – **some are required and some are there just for your convenience if you want/need to add information.**
 - a. KWIC requires these fields be completed to transfer in a client from out of state. If you have other information, you can enter it but only these are required to accomplish the task in KWIC.
 - ◆ Racial Ethnic
 - ◆ Dual Participation, if not transferring in the client on the same day Apply for WIC was used.
 - ◆ Any change on the Health History
 - (1) If pregnant, Health Interview “Pregnant with Multiples?”
 - (2) If Infant or young Child, Health Interview “Breastfeeding Status”
 - (3) If older child, any field on the Health History
 - ◆ Identify WIC Eligibility Period
 - b. WIC policy (CRT 10.03.00) also instructs staff to:
 - ◆ Accept the VOC card as proof of income eligibility. There is no documentation required.
 - ◆ Document proof residency, client identity and caregiver identity. (Follow normal policy if they don’t have a proof with them – provide 1 month of checks so they can bring proofs next month.)
 - ◆ Make appropriate referrals, including to WIC nurse or RD as needed
 - ◆ Inquire about voter registration

- ◆ Record any other appropriate information
 - ◆ Assess secondary nutrition education needs based on risk level and time before certification ends. Schedule as appropriate
- c. As previously stated, some links are included on the Transfer From Out of State Guide for your convenience. Any information included on the VOC card should be entered on the appropriate window. For example if the VOC card includes the client’s certification risk factors, these should be entered on the KWIC Risk Factor Window. You do not have to enter something for each link, just the ones previously stated as required.
- d. After entering the required and other information, click on “Identify WIC Eligibility Period”. Enter the Eligibility Begin Date. This can be found on the VOC card as the begin eligibility date or the date certified.

Example: Susie Strawberry is pregnant and comes to your clinic with a VOC card from Nebraska showing she is in a current certification period. No one in the family has ever been on WIC in Kansas before. Use Apply for WIC – Create a New Group to start a KWIC record for Susie. Make up a reasonable date of birth and estimated due date. Make up other demographic information as appropriate. Click [**Save**].

From the menu bar **select Services / Transfer From – Out of State/Program**. Complete Susie’s transfer by following steps previously listed. Review the required items lists previously. This list includes those and others.

- Race/ethnicity – Not Hispanic, White
- Other proofs – Susie has a rent receipt showing her address and her driver’s license.
- The VOC card lists her risk factor as “In adequate Vitamin/Mineral Supplementation”.
- Referrals – She is not enrolled in any social service programs.
- Basic Contact – needs all information provided
- Voter registration - just moved so wants to register to vote
- Click on the “Identify WIC Eligibility Period.” Notice that KWIC has automatically added a risk factor “Transfer of Certification”. This allows there to be a risk factor if none are listed on the VOC card for you to enter.
- Enter “Eligibility Begin” **using the certification date** from the VOC card. *In Susie’s case, pretend her VOC card said that her certification was one month ago and enter an appropriate date.* After you enter the Eligibility Begin date, and save the record, KWIC will automatically calculate the eligibility end date. Out of State transfers are assigned Priority 1 by KWIC.

Warning of common error! Do **not** use the transfer/current date as the Eligibility Begin date. This error results in the certification period starting from the transfer/current date and makes the Eligibility End date too far in the future. That means more benefits than allowed! Call the Help Desk if this error occurs.

Transfer From Out of State Program

Transfer In from Out of State

Client **Susie Strawberry**
 Birth Date **09/26/1986** Estimated Due Date **02/16/2014**

You must enter an Eligibility Begin Date. The Eligibility End Date will be derived.

Recorded	Note	Assigned Risk
09/16/2013	Inadequate Vitamin/Mineral Supplementation	
09/16/2013	Transfer of Certification	

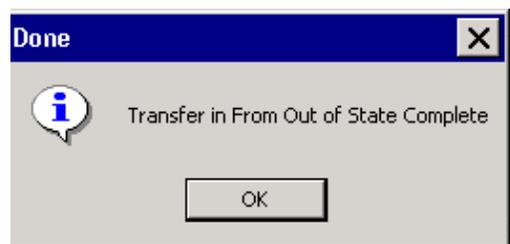
Is the client physically present? Yes No If Not, Describe Reason _____

WIC Category **PG** Eligibility Begin **00/00/0000** Eligibility End **00/00/0000** Priority **1**
 Date of Last Income Determination **00/00/0000** Transferring Family is Migrant

Certified by **01 Train**

- When you click out of the Eligibility Begin box (into any other field or the Save button) KWIC will auto fill the Date of Last Income Determination with the Eligibility Begin date to create a new income test in KWIC. If you have official information that the income test date was different than the certification date, you can edit the Date of Last Income Determination, but normally it is the same.
- Fields for “Date of Last Income Determination” and “Transferring Family is Migrant” will be presented in the migrant example later in this module.
- Click **[Save]** and **[Cancel]** to close the record.

You will see a confirmation message.



As policy CRT 10.03.00 specifies, don't forget to:

- Review Rights and Responsibilities and obtain the client/caregiver's signature;
- Destroy the VOC Card after the information is documented using the KWIC Transfer From Out-of-State guide and the client is transferred;
- Assess secondary nutrition education needs based on risk level and time before certification ends. Schedule as appropriate;
- Collect, void and return any checks issued by the out-of-state agency. Shred the checks if the originating agency's address is unknown;
- Prescribe a food package and issue checks. See [CRT 10.05.00 Transfers Using a Non-contract or Special Formula](#) for clients transferring with a food package for any formula other than a Kansas rebated formula; and
- Explain check usage procedures.

FYI – here is what the Income History for Susie Strawberry looks like (with an Eligibility Begin date of 04/14/2008). Notice it displays that the VOC card was the proof and a note

Kansas WIC Program
Income History
 Susie Strawberry

“Recorded from VOC” is automatically generated in the income note field.

WIC Income Eligibility Test 09/16/2013 4:49 PM by 01 Train at Butler County WIC Clinic

Number in Family VOC Migrant Test Zero Income Total Income

Food Stamps TAF FDPIR

Applicant is a member of a family in which there is a pregnant woman who is receiving or participating in Medicaid.

Applicant is a member of a family in which there is an infant who is receiving or participating in Medicaid.

Note
 Recorded from VOC

Transfer From–Out of State/Program for Children Certified for One Year by Other States

Federal WIC guidance allows a state option to certify children for one full year. The Kansas WIC Program intends to implement this option by 2014. KWIC Client Services Version 40 allows you to accept children certified by other states for one year, but the default is for a six-month.

[CRT 10.03.00 WIC Out of State Transfer Card Acceptance](#) Procedure step 2h states: If the transferring child has a one-year certification period from the originating state, staff are to do the following on the KWIC Transfer from Out of State WIC Program window:

- Check the “Transferring one year certification” box and
- Enter the Eligibility Begin date from the VOC information. KWIC will calculate the Eligibility End date.

Transfer From Out of State Program

Transfer In from Out of State

Client **Roxie Fry**
 Birth Date **12/06/2011**

Client is risk eligible. If you press SAVE, the client will be certified for WIC.

Recorded	Note	Assigned Risk
09/09/2013	Assumed Risk for Infants&Children btn 4 & 24 mos	
09/09/2013	Transfer of Certification	

Is the client physically present? Yes No If Not, Describe Reason

WIC Category **C** Eligibility Begin 07/05/2013 Eligibility End **07/31/2014** Priority **1**

Date of Last Income Determination 07/05/2013

Transferring Family is Migrant
 Transferring One Year Certification

Certified by Sandi Fry Save Cancel

Transfer From–Out of State/Program for Migrant

Bliss Blueberry is at your office with a current VOC card from Oklahoma. Bliss has never been on WIC in Kansas. She is pregnant, about 20 years old and due to deliver in about five months. She normally lives in Texas, was certified in WIC in Oklahoma one month ago and is working with custom wheat cutting crews for the entire south to north wheat harvest. From talking with her, you know she meets the definition of migrant. (See [PPM CRT 06.02.01 Determining Household Income](#) and Certification Guides module – Special Information about Migrant Family Income Eligibility section.)

Use Apply for WIC-Create a New Group and create a Kansas WIC record for Bliss. Make up a date of birth so she is about 20 years old. Make up a due date in about five months. Save.

Go to Demographics and click on the Migrant box and save.

From the menu bar **select Services / Transfer From – Out of State/Program.**

Bliss Blueberry 10358838 Gender Female DOB 08/01/1993, 20 Years	WIC Applicant Client not Certified	WIC PG Due Date 02/17/2014
Transfer From Out of State Program ☒ Bliss	Demographics ☒ Bliss	Notices ☒ Bliss

Transfer from Out of State for Bliss Blueberry.

You have started recording VOC information for Bliss Blueberry.
To complete the certification, click on and complete each task labeled 'Needed' in the list below.

Race and Ethnicity	Needed
✓ Dual Participation Test	Completed 09/17/2013
Proof of Residency	Needed
Proof of ID	Needed
Anthropometric Measurement	Needed
Blood Measurement	Needed
Health Interview	Needed
Assess Risk Factors	Needed
Nutrition Education	Needed
Referrals	Needed
Voter Registration	Needed
Complete Transfer In From Out of State	Needed

Complete her transfer by following steps previously listed.

- Race/ethnicity – Not Hispanic, White
- Other proofs – rent receipt showing her address at a local motel and her Texas driver's license.
- Health History: She is not pregnant with twins.

- The VOC card lists her risk factor as “History of Preterm Delivery”, “History of LBW”, and “Migrancy”. If you have marked the Migrant box on Demographics, KWIC will automatically have assigned the risk.
- Voter registration - moving through so does not want to register to vote
- Even though no note is required, you should open Notes and describe the situation that causes her to meet the definition of migrant (and any other pertinent information).

Click on the last link – Transfer In from Out of State.

Transfer From Out of State Program

Transfer In from Out of State

Client **Bliss Blueberry**

Birth Date **08/01/1993** Estimated Due Date **02/17/2014**

You must enter an Eligibility Begin Date. The Eligibility End Date will be derived.

Recorded	Note	Assigned Risk
09/17/2013		History of Low Birth Weight
09/17/2013		History of Preterm Delivery
09/17/2013		Migrancy
09/17/2013		Transfer of Certification

Is the client physically present? Yes No If Not, Describe Reason

WIC Category **PG** Eligibility Begin **00/00/0000** Eligibility End **00/00/0000** Priority **1**

Date of Last Income Determination **00/00/0000** Transferring Family is Migrant

Certified by **01 Train**

Her VOC card indicates she was certified about one month ago. Enter an appropriate Eligibility Begin date.

As soon as you click out of the Eligibility Begin date, the Date of Last Income Determination will auto-fill with the Eligibility Begin date. *You can edit the Date of last Income Determination if you have official information that states a different date from the Eligibility Begin Date – which might occur especially for migrant clients.* Normally it will be the same date.

Click the box for Transferring Family is Migrant. This sets the internal KWIC rules that allow a migrant family to go for a year without having another income test. (See the Certification Guides module.)

Click **[Save]** and **[Cancel]** to close the record.

In real life, you would ask how long they expect to be in the area (and in Kansas). Issue checks accordingly. Finally, if a migrant client might be moving on to another state before next checks are due – issue a VOC card and give to the client to take to the next state. (See CRT 10.02.00 **WIC Out-of-State Verification of Certification (VOC) Card Issuance** and instructions later in this module.) If they end up not moving on, the VOC card can be voided (as described later in this module.)

Skill Builder

Transfer From – Out of State/Program



1. **Cheryl Chard** comes into clinic seeking to continue WIC services for her son **Charlie Chard**. She just moved to Kansas from Missouri and nobody in her family has ever been on WIC in Kansas before. She has a VOC Card with Charlie's current Missouri certification information. Use **Apply for WIC** to start a Kansas WIC record for Charlie. Then use **Transfer From – Out of State/Program** with the following information to complete the process.
 - Charlie is 3 years old this month. Enter an appropriate date.
 - Ethnicity is Hispanic and race is white.
 - Cheryl did not bring any proof of identity or residency today.
 - Open the Health History and make a change to enable the completion link.
 - The VOC Card does not list any risk factors so you do not need to open risk factors.
 - Income – remember KWIC allows the VOC card to automatically count as income proof, so you don't have to enter anything
 - Eligibility Begin Date – He was certified in Missouri 3 months ago today. Enter an appropriate date.
 - Complete the transfer.
 - Remember that in reality you would follow clinic procedures to determine the care plan for secondary nutrition education or a recertification appointment as needed.
2. **Heather Cherry** comes into your clinic with her four-year old nephew **Conner Cherry**. He did live with his grandmother in California and now lives with Heather. He has never been on WIC in Kansas before. She has a VOC card from California. Use **Apply for WIC–Add a New Client to an Existing Group** to start a Kansas WIC record for Conner by adding him to Heather's group. Then use **Transfer From – Out of State/Program** to enroll him. Make up data as you desire.

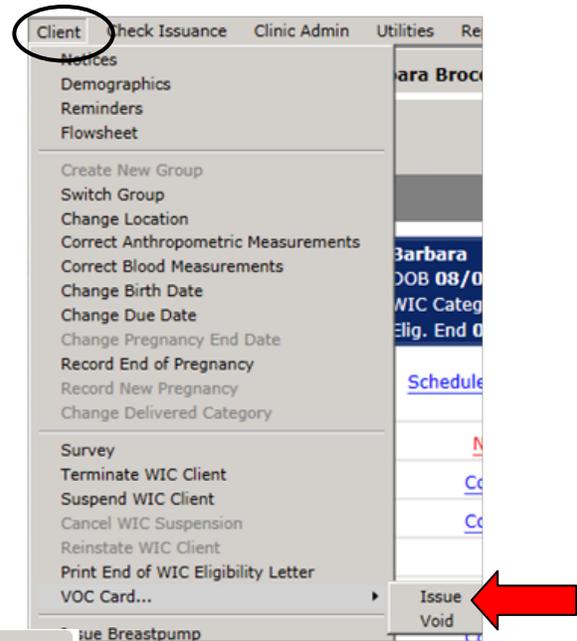
VOC Card – Issue

Clinic staff should encourage clients to get a Verification of Certification (VOC) card if they plan to move out of state during a current certification period. The **VOC Card - Issue** window is used to print a Verification of Certification (VOC) Card for an Active or Presumed Eligible client who is moving out of Kansas. Review policy [CRT 10.02.00 WIC Out-of-State Verification of Certification Card Issuance](#) that you were assigned to read at the first of this module.

Note about the training environment: When you issue a VOC card in the training environment, there will be no card actually printed. KWIC will record the action as if a card was printed and display a message stating that printing the VOC card is simulated.

Issuing a VOC Card

1. You are supposed to print checks through the last month the client plans to be in Kansas. If you have not printed checks yet, do that first, then issue the VOC card. (You need to do this because KWIC will not issue checks for clients with a status of Terminated.)
2. Use **Find Client** to retrieve the client’s record and open the client’s homepage. As an example, use **Barbara Broccoli**. Be sure to get the one with two l’s in the last name.
3. Select **VOC Card – Issue** from the Client menu.
4. The **Issue VOC Card** window opens. The names of all members of the selected client’s family that are eligible to be transferred will appear in the window.



Barbara Broccoli WIC Active PG
 10358741 Gender Female Cert. Period 07/28/2013 to 01/31/2014 Due Date 12/15/2013
 DOB 08/04/1996, 17 Years Priority 1

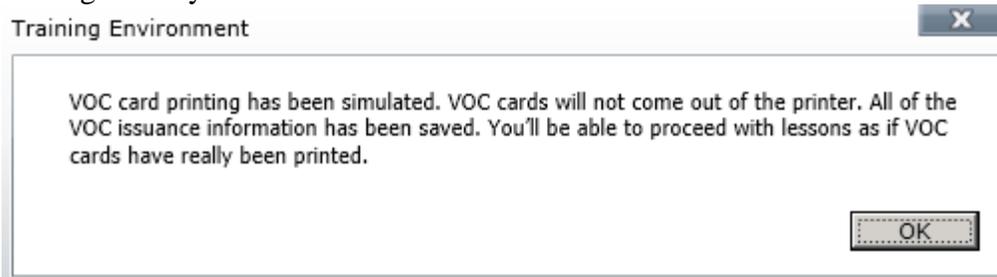
Issue VOC Card Notices
 Barbara Barbara

Client ID	Client	Status	Issue VOC	Terminate
10358741	Barbara Broccoli	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Note:

Issue Cards Cancel

5. Determine the name(s) of the client(s) that are to have a VOC Card printed. By default, the Issue VOC check box and Terminate check box is marked by KWIC. If any family members are staying in your clinic, click on their “Issue VOC” box to delete the check mark and prevent KWIC from printing a VOC Card. (This will also delete the Terminate check mark.)
6. KWIC allows you do delete the Terminate check box and issue a VOC card without terminating the client. This would only be done in very rare situations.
7. You must write a note in the Note field. Make a note as needed – perhaps the only information of interest is where the family plans to move. Make a note that says Barbara is moving to Colorado in a few weeks.
8. Writing the note enables the Issue Card button. Click the Issue Card button. You will see a confirmation message. The training environment has a different message from your real clinic Client Services.



9. The VOC card prints on check stock. A WIC staff member must sign each card. The VOC card stub should be shredded. It does not have to be retained in the clinic.
10. KWIC will create “Issue VOC Card” contact in the client’s Contact History.

A VOC card allows a client to obtain WIC services in another state. To prevent possible fraud, a VOC card that is mistakenly printed, returned, etc. is to be voided in KWIC and destroyed. (Instructions are in the next section of this module.)

You should issue a VOC card for a military client moving overseas. See [CRT 10.04.00 WIC Overseas Program](#) for details related to issuing a VOC card to military clients, civilian clients who work for the military and employees of companies that contract with the military when any of these clients are transferring overseas.

As previously mentioned in this module, you may need to print a VOC card immediately after certification/printing checks for a migrant who plans to move out of Kansas before the next checks are due (or is unsure how long they are staying.) If the client ends up staying in Kansas, the VOC card can be voided as described in the next section.

Skill Builder

Issue a VOC Card



Lisa Lemon is in clinic and mentioned that she plans to move to Iowa in a few weeks. She wants to continue WIC services when they get settled in their new home.

- Use the **VOC Card – Issue** window to issue a VOC card for **Lisa and Logan**. Leave the option to terminate their status.
- Notice that Leslie is not in an active certification period so you can not issue a VOC for him.

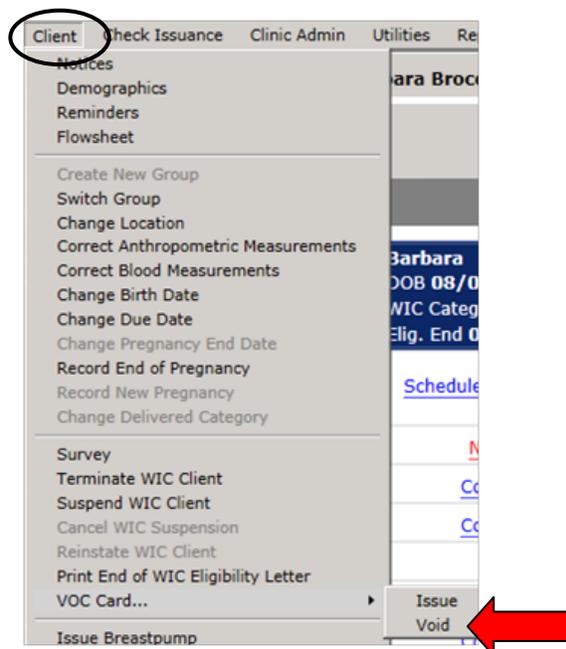
VOC Card – Void

The **VOC Card – Void** window is used to void a VOC card that has been issued to a client. Clinic staff will use this feature when a client who requested a VOC card comes back to clinic after deciding not to move, or a VOC card was issued by mistake.

If the client is within the original certification period, staff can reinstate the client and continue to provide services after voiding the VOC card. If the client's eligibility end date is passed, the client must be recertified.

Voiding a VOC Card

1. Use **Find Client** to retrieve the client's record and open the client's homepage. As an example, use **Barbara Broccoli**. Be sure to get the one with two l's in the last name. If you did not issue a VOC card for Barbara as in the previous section, you will not be able to complete this activity.)
2. Select **VOC Card – Void** from the Client menu.
3. The **Void VOC Card** window opens.

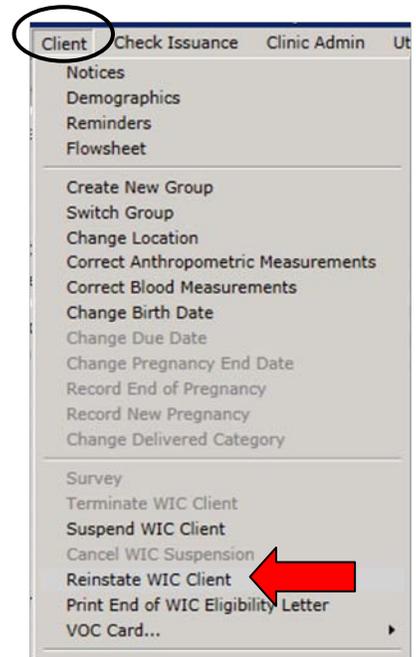


- Click on the **Void** box for the VOC card that needs to be voided.

Lisa Lemon		WIC Terminated PG	
10355613	Gender Female	Cert. Period 06/06/2013 to 03/31/2014	Due Date 02/05/2014
DOB 05/28/1989, 24 Years		Priority 1	
« Void VOC Card Lisa		Notices Lisa »	

Void VOC Card						
Void	VOC Card #	Issued	Issuing Staff	Issuing Clinic	Voided	Voiding Staff
	1035337	09/17/2013	01 Train	Butler County WIC Clinic		

- Click [**Save**] to void the card and [**Cancel**] to close the record.
- KWIC will create a “Void VOC Card” contact in the client’s Contact History.
- If there are other family members with VOC cards that need to be voided, you must repeat this process with each family member and void their cards separately.
- Although not required, it is good clinic practice to make a note in the client record about the circumstances that led to voiding a VOC card.
- If the client is still within their certification period, use Reinstatement Client to change the client’s status from Terminated to Active. (If the client was past their Eligibility End date, you will have to recertify them before issuing more checks.)
- As stated in the policy, destroy voided VOC cards.



Skill Builder

Void a VOC Card



Lisa Lemon is back in clinic. She decided not to move away from Kansas. She wants to continue WIC services for herself and Logan at your clinic.

- Use the **VOC Card – Void** window to void the VOC card previously generated for Lisa. Repeat for Logan.
- Use **Reinstate WIC Client** (under Client) to change Lisa’s status from Terminated to Active. Repeat for Logan.
- Try to use the **VOC Card – Void** window for Leslie – notice when you open the **VOC Card – Void** window for him there is no VOC information to void. (Remember you could not issue a VOC card for him because he was not in an active certification. He does not have a VOC card to void.)
- Look at Lisa’s Contact History (Client – View History – Contact). It should be similar to this:

Contact History		Notices	
Lisa		Lisa	
From Date	00/00/0000	To Date	00/00/0000
Currently Viewing: All contacts for client.			
Client Contacts			
Date/Time	Contact Description	Staff Person	Location
09/17/2013 12:47 PM	Reinstate WIC Client	01 Train	Butler County WIC Clinic
09/17/2013 12:43 PM	Void VOC Card	01 Train	Butler County WIC Clinic
09/17/2013 12:37 PM	Issue VOC Card	01 Train	Butler County WIC Clinic
09/11/2013 02:02 PM	Change Due Date	01 Train	Butler County WIC Clinic

The End