# Apply for WIC & Dual Participation

This module applies to the following security roles:
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Clerk
RN/RD
Breastfeeding Peer Counselor

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

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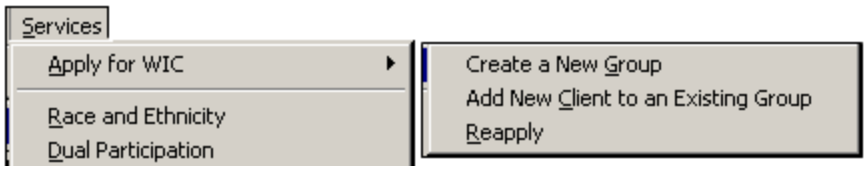
## Apply for WIC

The Apply for WIC windows are used to enter new clients and used for terminated clients who wish to reapply. The Apply for WIC windows are used to enter a minimum amount of client information…enough to make an appointment. Completing Apply for WIC also sets the Initial Contact Date in KWIC.

There are three Apply for WIC windows located in the Services menu:




**Create a New Group** – used to enter a new group that is not currently in KWIC.

**Add New Client to an Existing Group** – used to add a new client that is not currently in KWIC to an existing group that is currently selected.

**Reapply** – used for an applicant who has a previous record in KWIC in the current clinic.

All three of these menu choices take you to the same screen. Based on which menu choice you select, the group and/or applicant information may be pre-populated with existing group and client information.

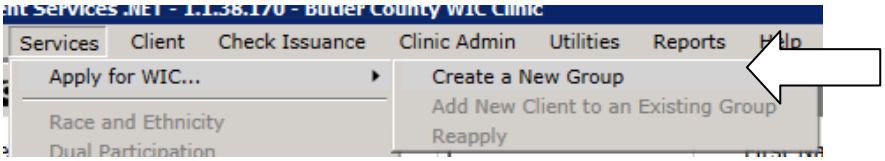
## Apply for WIC - Create a New Group

**Never create a new record** if a group or individual record already exists in KWIC – either in your clinic or somewhere else in Kansas. Thoroughly question the client about being on WIC in Kansas.

- Have you or anyone in your family been on WIC before?
  - With a different name?
  - In a different family group?
  - Somewhere else in Kansas?
  - In another state?
- If yes, in your clinic - use the existing record.
- If yes, in another Kansas clinic – use KWIC's Transfer From In-state to move their record to your clinic.
- If yes, currently active in another state – *see Transfers training module.*

If you mistakenly create a new record for a client, call the Help Desk immediately to try to remedy the KWIC records.

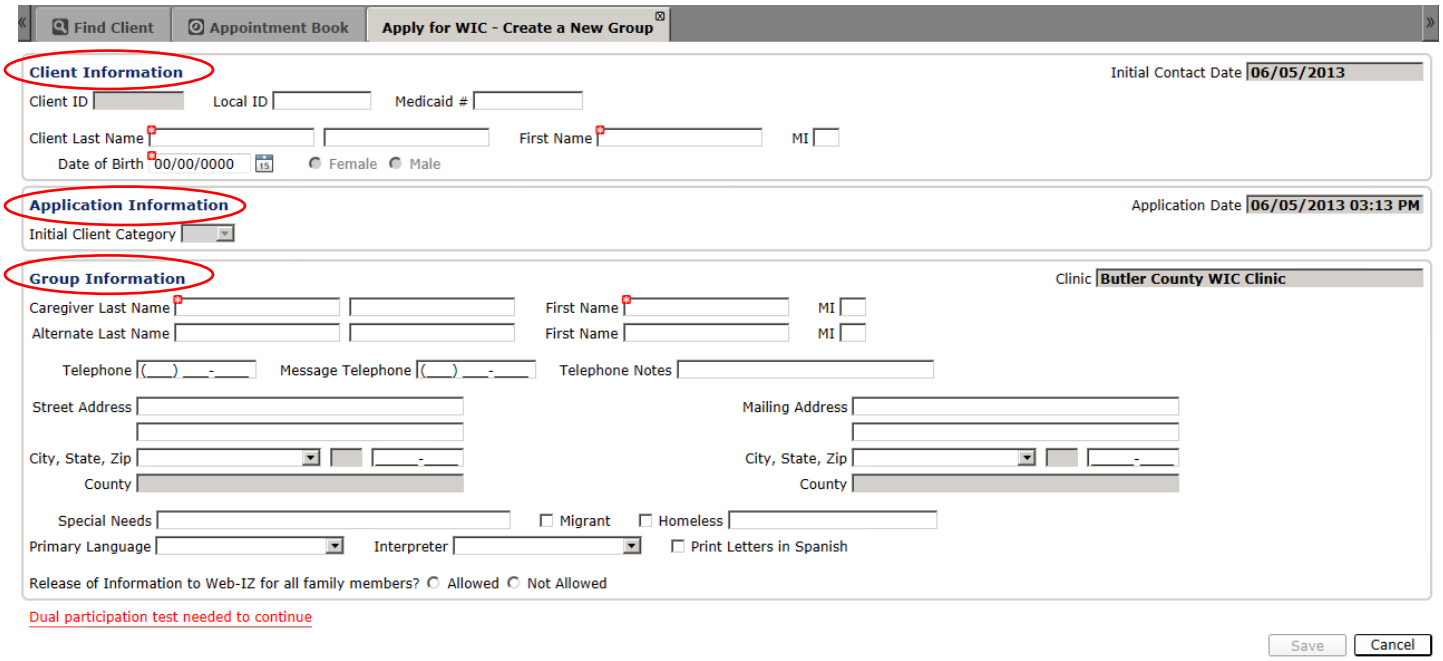
Initial Demographic information is entered by selecting Services from the menu bar, Apply for WIC ⇨ Create a New Group




The Apply for WIC-Create a New Group window will open so you can enter information.

Keyboard Tips

- If you need to make a correction, use the keyboard arrow keys to move backwards or forward in a field.
- Use the Tab key to move forward from field to field.




## Section 1. Client Information

- **Client ID** - automatically entered by the computer once the Client's file is saved. The box remains shaded and is read-only.
- **Local ID** – optional – local clinic procedure may require staff to record a local ID (medical record number, Medicaid pin number, etc).
- **Medicaid #** - optional – staff may record if desired for other program reasons.

Be careful to capitalize and punctuate correctly in name and address fields. Whatever you enter in these fields will display throughout KWIC and on notification letters.

- **Client Last Name** – enter the Client's last name, capitalizing the first letter. There are two fields for Client Last Name to accommodate those clients who use two last names.

- **First** – enter the Client's first name capitalizing the first letter. If the client commonly uses a nick name, enter it in parenthesis after the legal first name.

- **MI (Middle Initial)** – enter the Client's middle initial, if applicable. If there are two clients at your clinic with the same name, their middle initial may become useful in distinguishing between the two.

- **Gender** – enter "F" or "M" as appropriate.

- **DOB** – enter the Client's date of birth as mmddyyyy (4 digit year is required). Enter numbers only - no slashes need to be entered. Or click on the calendar icon to use it.

- **Age** – automatically calculated when birth date is entered. Age is displayed as years for women, and years and months for children and infants. Age for newborn infants less than 1 month will display as 0.

- **Category** – select the Client's category. Click in the box then type the first letter of the category or use the mouse to select from the drop-down list. A category must be selected. A child or infant category is selected automatically for age when you click on the drop down arrow.

- **Foster Child** – Will display if client is an infant or child. Click the box if the infant or child is a foster child.

- **Initial Contact Date** – is set automatically to the date Apply for WIC is being done. Reapply for WIC and Presume Eligible reset the Contact Date.

## Section 2. Application Information

- **Category** – If age is appropriate for an Infant or Child, the Category field will autofill. For a woman, click on the drop down arrow to select PG, BF or PP.

- **Estimated Due Date –** field will display if PG category is selected.

- **Pregnancy End Date** – field will display if BF or PP category is selected.

## Section 3. Group Information (The Family Information)

Information entered in this section will display for any subsequent group members that you add.

- **Clinic** – clinic where the Client's file resides. This is a read-only field. This is a feature for sites that have multiple clinics.

- **Caregiver Last Name, First Name, MI (Middle Initial) –** automatically populates for women; the user must enter this for clients who are an infant or child. If the client commonly uses a nick name, enter it in parenthesis after the legal first name.

- **Alternate Last Name, First Name, MI** – enter if there is another person who will be picking up checks or using the checks at the grocery store. This might be a husband, parent, grandparent, neighbor, etc.

- **Telephone** – enter the Client's phone number, usually their home phone number.

- **Message Telephone** – enter when the Client wants to use an alternate phone to receive calls from the clinic.

- **Telephone Notes** – enter any notes related to phone use, e.g. Call after 5:00; Always use message number; Message number is grandmother.

**NOTE:** A telephone note is limited to 100 characters and fewer display on the screen. To view a long phone note, use the keyboard arrow keys to view more characters. You may also use the Home and End keys to move quickly through this field.

- **Street Address** – enter the Client's street address the way you want it to appear on a letter. Two lines are available so apartment numbers may be entered on the second line.

- **City**- select the City where the Client lives.

- **County** – defaults to the county in which the City is located.

- **State** – defaults to KS.

- **Zip** – enter the Client's zip code (5 or 9 digits).

- **Mailing Address** – Enter a mailing address if the Client wants to receive mail at a different address other than her street address, such as a PO Box. If no mailing address is entered, KWIC will use the street address when letters are printed.

**NOTE:** Leave the Mailing Address field blank if the mailing address is the same as address entered in the other fields. Do **not** type "Not Applicable", "Same", etc.

- **Special Needs** – a place to put notes about any special needs the Client or group might have (transportation difficulties; prefers morning appointments, etc). All special needs notes are shared by the clients in the group so specify the name of the client if needed. "Special Needs" appears in red on the Client's Flowsheet to help staff remember these concerns when scheduling the Client's appointment or in setting up their care plan.

- **Migrant** – check if the Client meets the WIC definition of migrant. (See policy CRT 06.02.01 Determining Household Income. When this box is marked, the computer will assign Migrancy as a risk factor on the Assess Risk screen for each member of the group at the time of certification. Checking this box will cause KWIC to use special "migrant rules" on the Income screen that allow income to be determined only every 365 days.

- **Homeless** – check if the Client meets the WIC definition of homeless. See policy CRT 05.01.00 Homeless Clients. When this box is marked, the computer will assign Homelessness as a risk factor on the Assess Risk screen. *Use the field beside the checkbox to document information about where the client sleeps at night.*

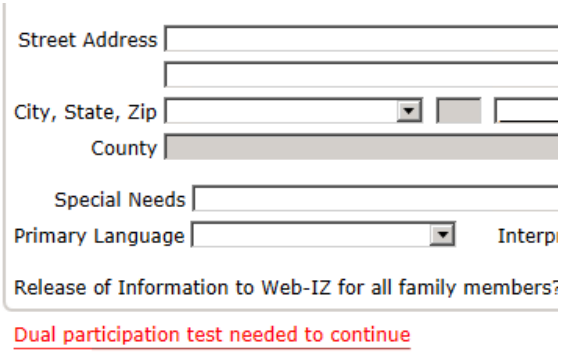
- **Primary Language** – select the Client's primary language spoken in the home. Complete this for all clients, even if English-speaking. (Used for statistical purposes.)

- **Interpreter** – select the appropriate language if the Client needs an interpreter. The Appointment Summary Report will indicate "I" for interpreter needed for the client's appointment.

- **Print Letters in Spanish** – If a Spanish interpreter is selected, the "Print Letters in Spanish" will automatically be checked. Staff have the option of unchecking the box and getting letters in English if the client prefers letters in English. If the client does not need an interpreter for the appointment, but wants a letter in Spanish, the interpreter box can be left blank, but the box can be checked to print Spanish letters.

- **Release of Information to Web-IZ for all family members** - If the caregiver agrees to allow it, demographic information for infants and children (client name, gender, birth date, address and telephone number) is sent from KWIC to KSWebIZ. Read-only information about the client's immunization history and the recommendations for needed or upcoming vaccinations from KSWebIZ are visible on the Immunization window of client's KWIC record. Information about WIC participation is NOT available to KSWebIZ users.

The main thing to stress to clients is that with this release, anytime WIC updates their address, phone, etc, then KWIC will send that information to the Kansas Immunization Registry (KSWebIZ) so it will be correct. It will also allow staff to update their shot record in the registry. So it is a convenience for the client and helps ensure accurate information in the registry. See policy CRT 08.01.01 Kansas Immunization Registry and KWIC and talk with your supervisor about the clinic's procedure for completion of the authorization form.




**Why is the Save button still light gray after I've entered everything???**

You must manually click the **Dual participation test** link before the **[Save]** button is enabled.

## Apply for WIC - Dual Participation

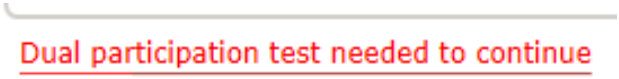
This section introduces you to the Dual Participation window. To view the Dual Participation window you will need to obtain some information from an existing client.

*Use the **Find Client** window to search for Carla Carrot. Write down her birth month and year. Close her record.*
*Now enter a new client with the same name, Carla Carrot, and the same birth date. Notice what the dual participation screens look like.*

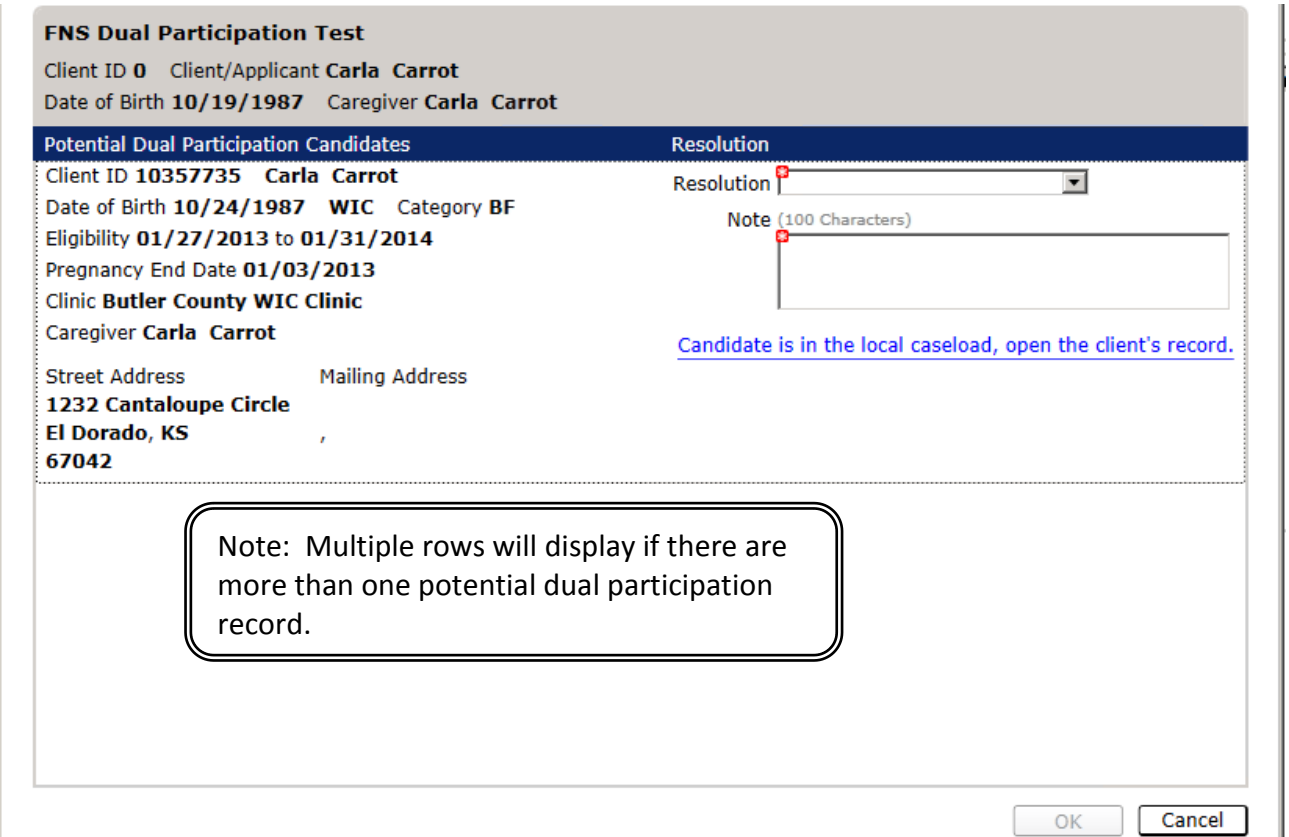
From the **Services** drop down menu, select **Apply for WIC / Create a New Group**. Enter a new client record using the information provided below.

- Client Last Name – Carrot
- Client First Name – Carla
- DOB – Use the month and year you recorded for Carla Carrot that is already in KWIC. Choose any day of the month as the actually birth day.
- Gender – Female.
- Pregnant
- Due in 3 months.

Click the **Dual Participation** link.




You will see this screen, although the dates will be different.




Note: Multiple rows will display if there are more than one potential dual participation record.

To resolve potential dual participants:

1. Compare the identifying information of the client being entered to the identifying information of the potential matches.

2. Determine if the client being entered is the same person or is a different person than each of the potential matches. Question the client as needed.

   - **If the applicant is actually the same person as the Potential Dual Participation Candidate already in your caseload:**

     - Do **not** select a choice from the Resolution field.

     - **Do click the link** Candidate is in the local caseload, go to their Homepage". **Proceed with using the existing record.** Clicking this link will open that client's existing record and close Apply for WIC without saving any information already entered.

   - If the applicant **is the same** as the Potential Dual Participation Candidate and in another agency:

     - Do **not** select a choice from the Resolution field.

     - Do click the link Candidate is in a different agency, go to Transfer In. Clicking this link will open the **Transfer From In State/Program** screens and close Apply for WIC without saving any information already entered.

Remember – **never create a new record** if a record already exists in KWIC – either in your clinic or somewhere else in Kansas.

   - If the applicant is not the same client already in your caseload, you need to select a Resolution from the drop-down box.

| Resolution | When to Use |
|---|---|
| **Not Dual Participant** | If you are sure the applicant is a different person than the potential dual participation candidate, select "Not Dual Participant". A note must be entered in the Notes field. In the note, explain how you know this is not a dual participant |

| | |
|---|---|
| **Dual Participant** | If you determine the applicant and the potential dual participation candidate are the same person **and that person is attempting dual participation** in the program, select "Dual Participant." Selecting this resolution requires that a note be entered in the Notes field. *(This resolution is the least common selection).* |
| **Unknown** | If you are unable to determine if the client being entered and the potential dual participation candidate are the same person or a different person, select "Unknown". Using this option allows you to continue, deferring the resolution of dual participation status to a later time when you have more information. Selecting this resolution requires that a note be entered in the Notes field.<br><br>Clients with an Unknown resolution on the Dual Participation window will appear on the Potential Dual Participation Report. Dual Participation status for these clients will have to be resolved. |

***Important Note*** – if during the process of resolving Dual Participation you determine that the client is (or was) actually on WIC in another Kansas WIC clinic you should:

- Click the **[Cancel]** button to close the Dual Participation window without saving data entered
- Click the **[Cancel]** button on the Apply for WIC window to close the window without saving data entered
- Transfer the client in to your clinic by using the Transfer From In State/Program option found in the Services menu. This feature will be discussed in a later training module.

It is very important for you to follow the previous instructions when you find a client who is active **or inactive** in another Kansas WIC clinic. You must Cancel and transfer their record to your clinic. If you choose "not dual" and start a new record – ***that client will have separate records in KWIC that can never be put together.***

3. **Click [OK]**. The Potential Dual Participant window closes and you are returned to the Apply for WIC window.

   Notice that the Dual Participation link changes to **Dual Participation Test Completed** and the **[Save]** button is enabled.

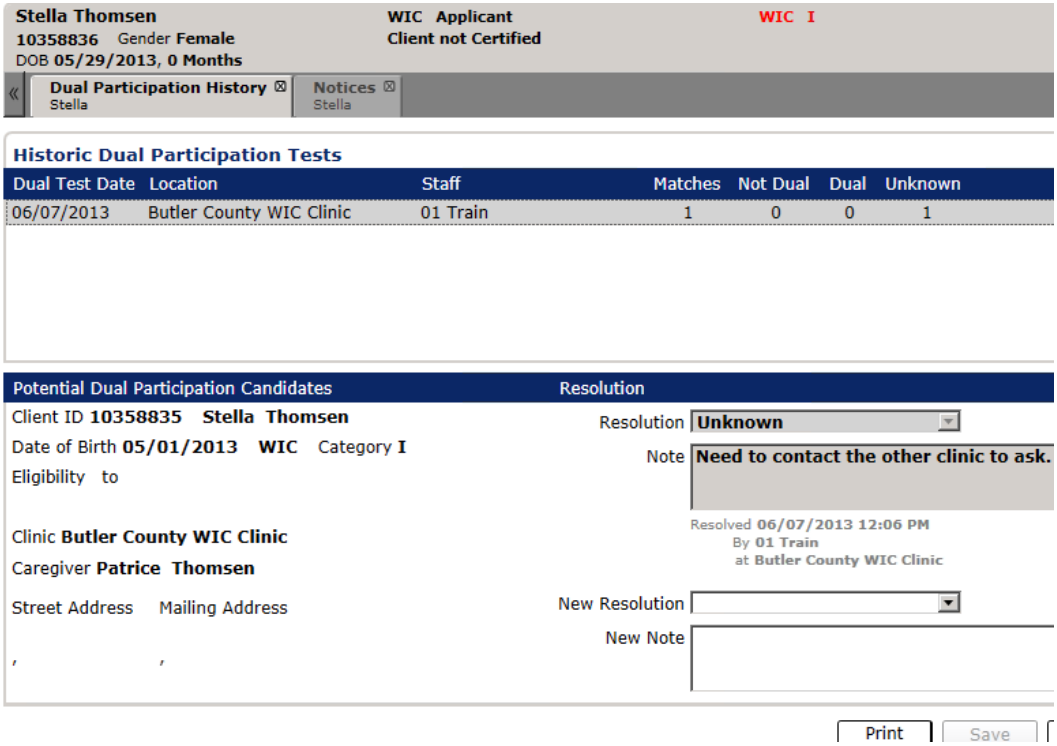
4. Verify all information entered is correct and click **[Save]**.

5. The Apply for WIC window is saved and the client's Notices page is displayed.

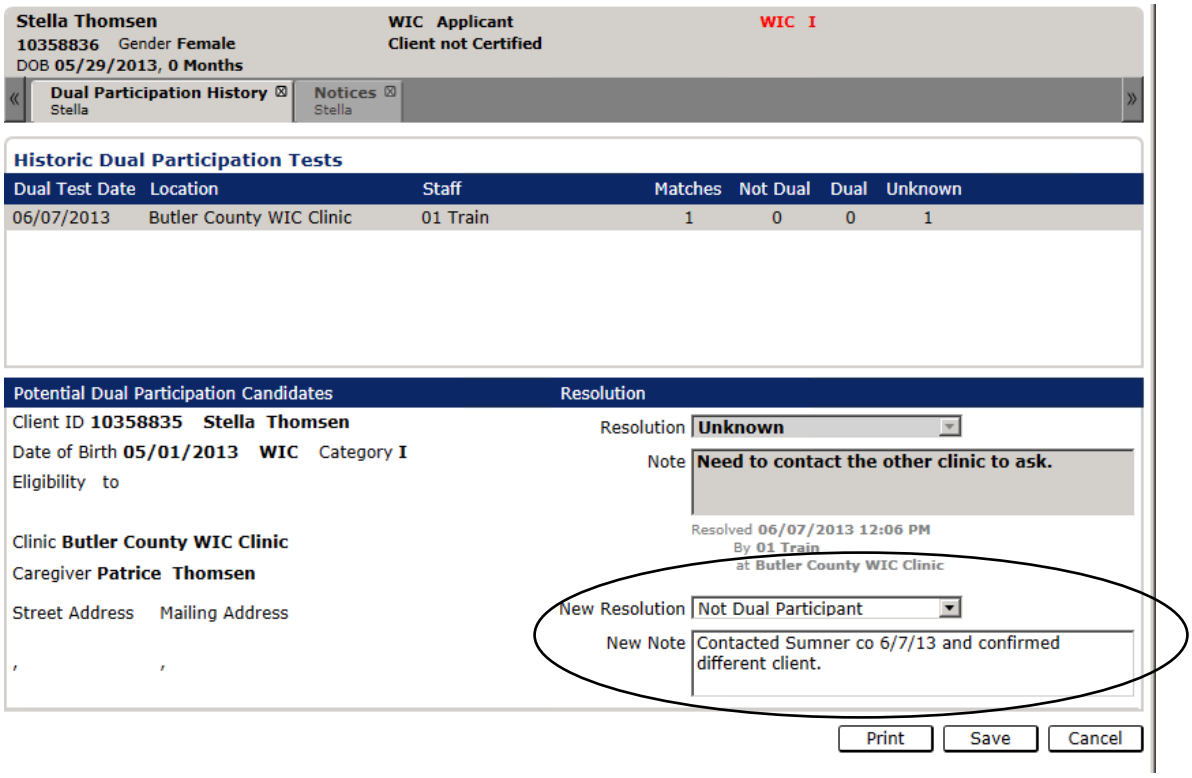
   From here you can:
   - Make an appointment by clicking the **Schedule an Appointment** link or the Appointment Book tab at the upper part of the screen.
   - Provide services to the client using the Quick Links, the links on the Notices tab, or by selecting the service from the menu bar.
   - Add another member to the group by clicking the **Add a New Group Member** link in the Group Members box (upper left corner).

**What should I do if a Dual Participation test was recorded in error as "Dual Participant", and I still need to certify my client?**

Follow these steps to clear the potential dual information so you can certify them. Use the same steps if you certified them with "Unknown" dual status and later learn the information need to identify them as not a dual participant.



1. Verify the client is not actually a dual participant.
2. Open the **Dual Participation History** window (Client menu → View History → Dual Participation
3. Select the Dual Participation test that matches the entry as the client being marked as a Dual or Unknown Participant.
4. Select "Not Dual Participant" from the New Resolution dropdown and enter a note in the New Note field.




5. Save. A new line entry will be added to the history showing the new resolution.

Close the Dual Participation History window.

## FYI-Dual Participation Rules

Dual Participation is indicated when all of the factors below are true:

1. The client's first and last names partially match **within** a different client's first and last name. Examples of partial match:

| Client Being Tested | Existing Client | Results in Dual Participation Match |
|---|---|---|
| Mary | MaryAnn | Yes |
| Ann | MaryAnn | Yes |
| MaryAnn | Ann | No |

| | | |
|---|---|---|
| MaryAnn | Mary | No |
| Elso | Nelson | Yes |
| Nelson | Elso | No |
| MaryAnn | MaryAnn | Yes |

**OR**

2. The client's first and second last names partially match WITHIN a different client's first and second last name.

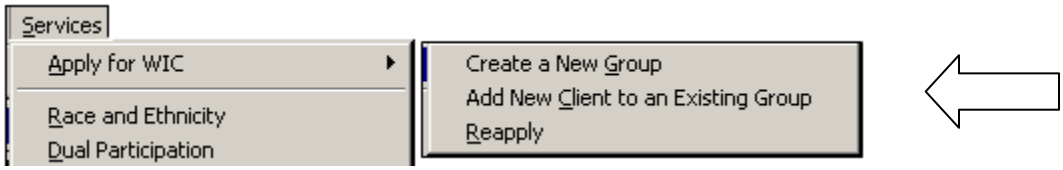
**PLUS**

3. The clients' month and year of birth are the same.

**PLUS**

4. The clients must be in different family groups.

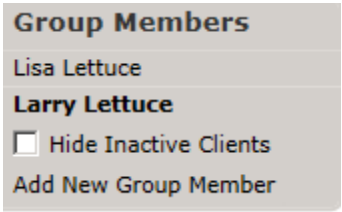
## Apply for WIC – Add New Client to an Existing Group




Use Add New Client to an Existing Group to add a new client that is not currently in KWIC to an existing group that is currently selected. This is only one of three ways KWIC can add a new client to an existing group.

Three ways to add a client to an existing group:

1. Apply for WIC – Add New Client to an Existing Group (as presented here.)




2. For other family members, a new client can also be added from the Add a New Member link in the Group Members information box (upper left corner).

3. For new infants of pregnant women enrolled in your clinic, this is done when you enter infant information in the Record End of Pregnancy window. (Presented in another module.)

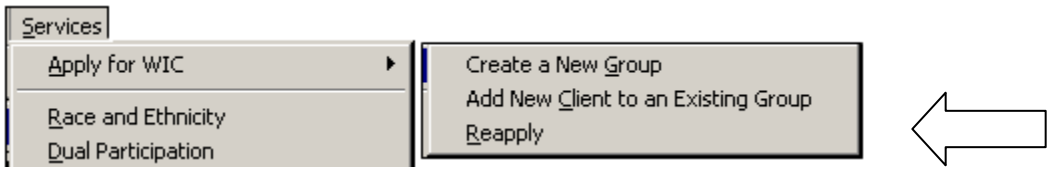
When using Apply for WIC – Add New Client to an Existing Group, the new client screen will open as you saw before.

- The new client information will be blank and need to be completed.
- The group information will be auto-filled.

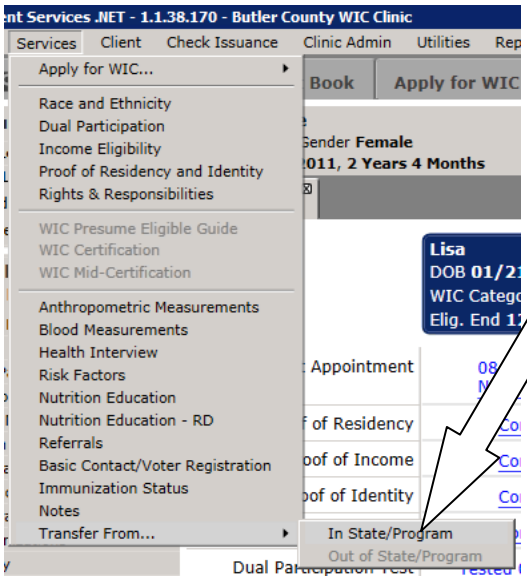
A Dual Participation test must be completed to continue. This client's Initial Contact Date is set to the date this screen is completed.

KWIC limits family group size to 20 members. Call the Help Desk for instructions if 20 is not enough, e.g. a foster mother who has had many children come and go over the years.

## Apply for WIC – Reapply




Use Reapply for an applicant who has a previous record in KWIC in the current clinic.




If they have a record in another Kansas WIC clinic, first use Transfer From In State/Program to bring their record to your clinic. (Do this even if they have not been recently active in WIC! You want to keep their whole record together.) Transfer From In State will be presented in detail in a different module.

Reapply for WIC assesses existing pregnancy information when used for a PG, BF or PP client. KWIC may pop up questions about past pregnancy and delivery records for the selected client. You may be directed to the Record End of Pregnancy or Record New

Pregnancy window depending on the state of the client's record. (You will learn more about those windows in another module.)

When using Apply for WIC–Reapply, the client and group information will be auto-filled. Review it and change anything as needed. A Dual Participation test must be completed to continue. This client's Initial Contact Date is reset to the date this screen is completed.

## Skill Builders

### Apply for WIC

April Apple called the local agency to see if she and her son Allen are eligible for WIC. You are not scheduled heavily today and can work her into today's schedule. You tell April what information she needs to bring (proofs of residency, income, identification and immunization records, etc.) and then let her know what time to arrive at the local agency.

1. Using the **Apply for WIC – Create a New Group** window create a new client with the following information. Make up any information not provided.

   Remember that you must complete a Dual Participation check by clicking the Dual participation test needed to continue link before information entered on Apply for WIC can be saved.

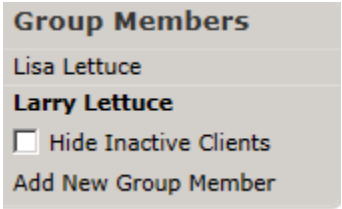
   Client Name – April Apple
   DOB – make up a date of birth so that April is 29 years old.
   Initial Client Category – PG
   Due Date – Make up a due date about 4 months in the future

2. Using the Add New Member link located in the upper left corner in the Group Members box) add her son Allen. (You can also use Apply for WIC – Add New Client to An Existing Group. Do not do both or you will start two records for the same client.)

   Client Name – Allen Apple
   DOB – Make up a birth date so Allen is 3 years old
   Initial Client Category – C

3. Lexi Lettuce is calling to get an appointment for herself because she just learned that she is pregnant. Her son Larry Lettuce is already on WIC but she has never been on WIC for herself.

    a. How do you add her as an applicant? (Answer: Retrieve the record for her child, Larry Lettuce. Use either Apply for WIC – Add New Client to an Existing Group form the Services drop-sown or use Add a New Member link in the Group Members information box (upper left corner).




    b. Complete the steps needed to add Lexi Lettuce as an PG applicant. Make up a date of birth to make her about 25 years old. Make up a due date.

4. Obelia Orange is calling to reapply for her child, Olivia Orange. Because Olivia's status is Terminated, you need to use Apply for WIC-Reapply. Complete this screen for Olivia.

   Remember to always review and update the client's demographic information as needed.

Be sure to add April and Allen Apple as directed in Question 1. You will use them as the major examples when you learn to certify clients in another module.

# The End