

Client History Windows

This module applies to the following security roles:

Receptionist

Clerk

RN/RD

Breastfeeding Peer Counselor



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Bureau of Family Health

Nutrition and WIC Services

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This module requires use of the computer and the KWIC Training Application

Table of Contents

| | |
|---|-----------|
| Objectives..... | 2 |
| Introduction..... | 2 |
| Appointment History | 3 |
| Contact History | 5 |
| Dual Participation History | 6 |
| Health Interview History..... | 6 |
| Income History | 8 |
| Measurement History | 8 |
| Referral To History..... | 9 |
| Risk Factor History..... | 10 |
| WIC Certification History Windows | 11 |
| WIC Certification by Certification Period | 11 |
| WIC Certification on Certification Completed Date..... | 12 |
| WIC Termination..... | 13 |

Objectives

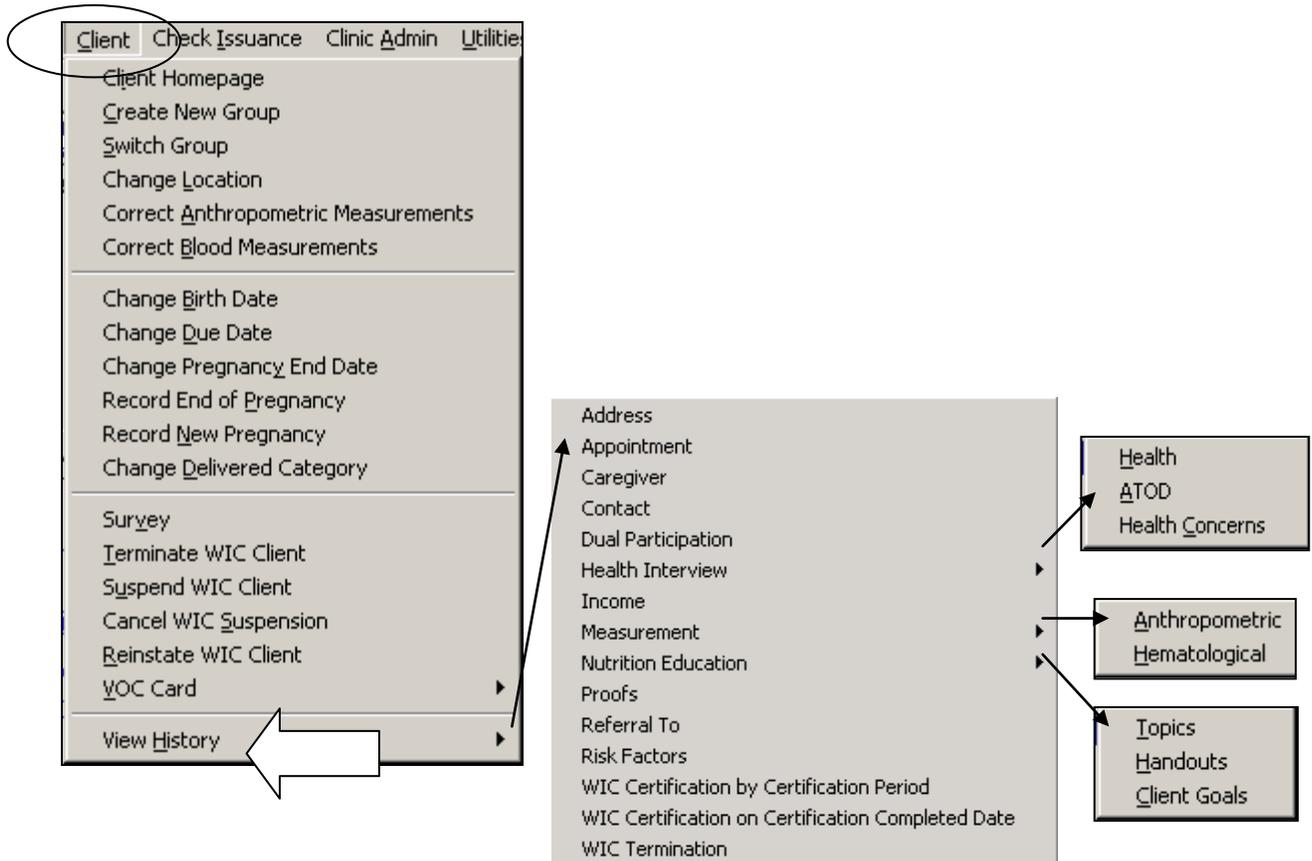
Upon completion of this activity, the employee will be:

1. Aware of Client History windows available through KWIC.
2. Able to match Client History windows to specific uses in the clinic.
3. Able to open and use Client History windows as needed.

Introduction

KWIC collects an enormous amount of information about clients. Much of this information can be viewed in the Client History windows.

The client history windows are located under the Client menu / View History. Remember that a symbol like this ► in the drop down box means that there is more drop down choices to the right. “Hover” your cursor over that row so you can see the options. The content of History window is strictly “view only”.



Some History windows are so commonly used that they are listed in the Quick Links at the left of a client's notices screen. So staff have a choice between using the Quick Link or the Client drop down menu.

We will present **just the most important** Client History windows in this module, but you should look at the entire list. You will never use some of the windows - until some odd situation occurs. Some of these windows might not be used much by LA are very useful to State Agency staff during an investigation or Management Evaluation of a clinic.

In general, the title of each Client History window is self-explanatory. We will mention a few specifically to point out potential uses. The look and feel is consistent for most of the client history windows. When you learn how to open and use one, that works the same for the others. We'll use the Appointment History window to describe how the Client History Windows function.

Appointment History

The Appointment History window is a “view only” screen used to view client appointment trends. History of appointments made in the KWIC Appointment Book and their outcome are recorded in this window automatically. You will only see results of **appointment services planned**, not the actual services provided. The Contact History Window keeps track of all contacts actually completed for the group selected.

If you follow directions in the Appointment Book module about how to reschedule an appointment, you will be able to see those appointments with an outcome of “Rescheduled” in the Appointment History. If you delete appointments, they will not be in the history. That is why it is better to only delete appointments made in error, not rescheduled appointments. Otherwise you will lose the history of when appointments

were originally made. Sometimes it matters and you want to be able to look back at “the whole story.”

Complete these steps:

1. **Retrieve Perry Potato’s record.**
2. From the menu bar **select Client / View History / Appointment.** The Appointment History window opens.

| | | | |
|---|---|---------------------|--|
| Perry Potato | | WIC Active C | |
| 10358577 Gender Male | Cert. Period 05/25/2013 to 11/30/2013 | | |
| DOB 11/06/2011, 1 Years 7 Months | Priority 5 | | |
| Appointment History <input checked="" type="checkbox"/> | Notices <input checked="" type="checkbox"/> | | |
| Perry | Perry | | |

| Appointments for Client (Perry Potato) | | Client Id (10358577) | | | | |
|--|----------|--------------------------|---------|------|----------|------------------------------|
| Date/Time | Duration | Location | Role | Type | Outcome | Outside Processing Standards |
| 06/21/2013 08:15 AM | 15 | Butler County WIC Clinic | Clerk 1 | NE+ | <none> | |
| 05/23/2013 03:00 PM | 15 | Butler County WIC Clinic | RN | RC | Complete | |
| 05/02/2013 03:45 PM | 15 | Butler County WIC Clinic | RN | RC | NoShow | |
| 02/14/2013 03:45 PM | 15 | Butler County WIC Clinic | Deb B | CP | Complete | |
| 02/04/2013 04:00 PM | 15 | Butler County WIC Clinic | Clerk 1 | CP | NoShow | |
| 12/13/2012 03:30 PM | 15 | Butler County WIC Clinic | Clerk 1 | NC | Complete | |

Notice the following:

- Identifying information about the client displays in the Client Header above the Appointment History window.
 - All of the data in the window displays as read-only but does not display in aqua. Each contact is displayed as a single row.
 - If you want to print the information, click [Print] in the lower right corner.
3. **Click [Cancel]** to close the window.

Contact History

The Contact History window is a “view only” screen used to view all contacts actually completed for the client selected, which may be different from the planned appointments shown in Appointment History. None of the information you see on this screen is based on appointments. The Appointment History Window keeps track of appointment information (i.e., services planned).

When the window is initially opened, the two display boxes populate with a list of client contacts completed.

- The top box displays a list of client contacts made.
- The bottom box displays a list of documents printed for the client.

Contacts are recorded when certain other windows are saved or functions completed. In this screen, for instance, the “Record Blood Measurement” contact was recorded when a new Hemoglobin values was entered **and saved**. In the Documents Printed (lower) portion of the window, simply printing a letter causes KWIC to record it here.

With KWIC, we assume that if you print a letter, you will either hand it or mail it to a client. Mistakes can happen so you might have to print another appointment letter, etc.

You might not use this window as much as State staff members use it for Management Evaluations. For instance, if you want to find out when hemoglobin was last done, you might just open the Anthropometric Measurements under the Services drop down Menu. But not all security clearances allow opening that window. All security clearances allow opening the Client History windows because they are all read-only.

These lists (especially the Contacts list) can become very long. Notice that you can narrow the list of contacts and documents printed that are displayed to a specific date or range of days by entering dates in the From Date and To Date fields at the top of the screen.

Enter a date range (or enter the same date in both fields to limit the list to a single date) and click the **[Find]** button.

| From Date | 00/00/0000 | To Date | 00/00/0000 | Find |
|--|---------------------------------|----------------|------------|------|
| Currently Viewing: All contacts for client. | | | | |
| Client Contacts | | | | |
| Date/Time | Contact Description | Staff Person | Location | |
| 05/30/2013 04:51 PM | Record Client Proofs | Donna Weber | Butler Cot | |
| 05/30/2013 04:51 PM | WIC Income Eligibility Test | Donna Weber | Butler Cot | |
| 05/30/2013 10:42 AM | Sign for Checks | Mary Powell | Butler Cot | |
| 05/30/2013 10:39 AM | Check Pickup | Mary Powell | Butler Cot | |
| 05/30/2013 10:38 AM | Rights and Responsibilities | Mary Powell | Butler Cot | |
| 05/30/2013 10:36 AM | Record Notes | Darcy Thompson | Butler Cot | |
| 05/30/2013 10:34 AM | Assign Food Package | Darcy Thompson | Butler Cot | |
| 05/30/2013 10:34 AM | Complete WIC Certification | Darcy Thompson | Butler Cot | |
| Documents Printed | | | | |
| Date/Time | Document | Staff Person | Location | |
| 05/30/2013 10:42 AM | Sign for Checks | Mary Powell | Butler Cot | |
| 05/30/2013 10:40 AM | Appointment Notice Letter | Mary Powell | Butler Cot | |
| 05/30/2013 10:38 AM | Rights and Responsibilities | Mary Powell | Butler Cot | |
| 02/28/2013 11:58 AM | Sign for Checks | Cindy Jones | Butler Cot | |
| 02/28/2013 11:57 AM | End of Eligibility Notification | Cindy Jones | Butler Cot | |
| 02/28/2013 11:56 AM | Appointment Notice Letter | Cindy Jones | Butler Cot | |
| 02/28/2013 11:54 AM | Rights and Responsibilities | Cindy Jones | Butler Cot | |
| 02/09/2013 03:15 PM | No Show Letter | Cindy Jones | Butler Cot | |

Dual Participation History

The Dual Participation History window provides a list of information for each time a Dual Participation “test” was done for the client. If the Dual Participation Tests have never shown a matching candidate, there will be a message in the lower portion of the screen.

Perry Potato
 10358577 Gender Male
 DOB 11/06/2011, 1 Years 7 Months

WIC Active C
 Cert. Period 05/25/2013 to 11/30/2013
Priority 5

« **Dual Participation History** Perry | **Contact History** Perry | **Appointment History** Perry | **Notices** Perry »

Historic Dual Participation Tests

| Dual Test Date | Location | Staff | Matches | Not Dual | Dual | Unknown |
|----------------|--------------------------|-------------|---------|----------|------|---------|
| 05/25/2013 | Butler County WIC Clinic | Cindy Jones | 0 | 0 | 0 | 0 |
| 12/15/2012 | Butler County WIC Clinic | Cindy Jones | 0 | 0 | 0 | 0 |
| 11/29/2012 | Butler County WIC Clinic | Cindy Jones | 0 | 0 | 0 | 0 |

Dual Participation Test
 Dual Participation Test Had No Matches.

List of all dual participation tests for this client.

If never a match, a message will display.

If there were matches, the Potential Dual Participation Candidates display in the lower part of the screen, along with the resolution and note of explanation by staff (already presented in the module titled *Apply for WIC & Dual Participation.*) Using the Dual Participation History to clear potential dual matches was also presented in that module.

Health Interview History

The Health Interview History is one of those histories that staff often use and so can be accessed via the Client dropdown menu or Quick Links at the left of the screen when you are anywhere in the client record. Staff use this history to check past responses to the health-related questions.

The screen opens up with a list of the dates of all saved Health Interview Histories to the left. (Basic WIC Certification History is listed to the right.) As with many of the history screens, you must click on the line for the Health Interview desired.

Perry Potato
 10358577 Gender Male
 DOB 11/06/2011, 1 Years 7 Months

WIC Active C
 Cert. Period 05/25/2013 to 11/30/2013
Priority 5

« **Health Interview History** Perry | **Contact History** Perry | **Appointment History** Perry | **Notices** Perry »

| Health Interview History | | | WIC Certification History | | | | |
|--------------------------|--------------------------|--------------|---------------------------|------------|-----|----------|-----------|
| Date | Location | Staff Person | Eligibility Begin | End | Cat | Priority | High Risk |
| 05/25/2013 | Butler County WIC Clinic | Mona Drury | 05/25/2013 | 11/30/2013 | C | 5 | |
| 12/15/2012 | Butler County WIC Clinic | Sunny Hayes | 12/15/2012 | 06/30/2013 | C | 5 | HR |

| Health Interview History | | |
|--------------------------|--------------------------|--------------|
| Date | Location | Staff Person |
| 05/25/2013 | Butler County WIC Clinic | Mona Drury |
| 12/15/2012 | Butler County WIC Clinic | Sunny Hayes |

| WIC Certification History | | | | |
|---------------------------|------------|-----|----------|--------|
| Eligibility Begin | End | Cat | Priority | High R |
| 05/25/2013 | 11/30/2013 | C | 5 | |
| 12/15/2012 | 06/30/2013 | C | 5 | HR |

Breastfeeding
 Breastfeeding Status
 Date Breastfeeding Stopped
 Date Formula/Milk Introduced
 Date Solids Introduced
 Formula Type
 Formula Name
 Formula Consumed per day ounces

Medication and Supplement Use
 Vitamins/Minerals Yes No Iron
 Other **dimetap, ibuprofen, tylenol prn, allergy medication**
 Notes

Household Smoking
 Medical Provider
 TV/Video Viewing

Click on the desired date line to bring up the Health Interview fields **changed on that day.**

Remember that only new changes are saved within a certification period, so you may have to click on more than one date to see all the completed fields.

In this example, the only field that displays information is the Medication and Supplement Use "Other" field. None of the other fields were changed that day.

To see that information, click the date line for the earlier Health Interview.

Now you can see the other information too

| Health Interview History | | |
|--------------------------|--------------------------|--------------|
| Date | Location | Staff Person |
| 05/25/2013 | Butler County WIC Clinic | Mona Drury |
| 12/15/2012 | Butler County WIC Clinic | Sunny Hayes |

Breastfeeding
 Breastfeeding Status **Never Breastfed**
 Date Breastfeeding Stopped
 Date Formula/Milk Introduced **11/06/2011**
 Date Solids Introduced **01/20/2012**
 Formula Type
 Formula Name
 Formula Consumed per day ounces

Medication and Supplement Use
 Vitamins/Minerals Yes No Iron
 Other **NONE**
 Notes

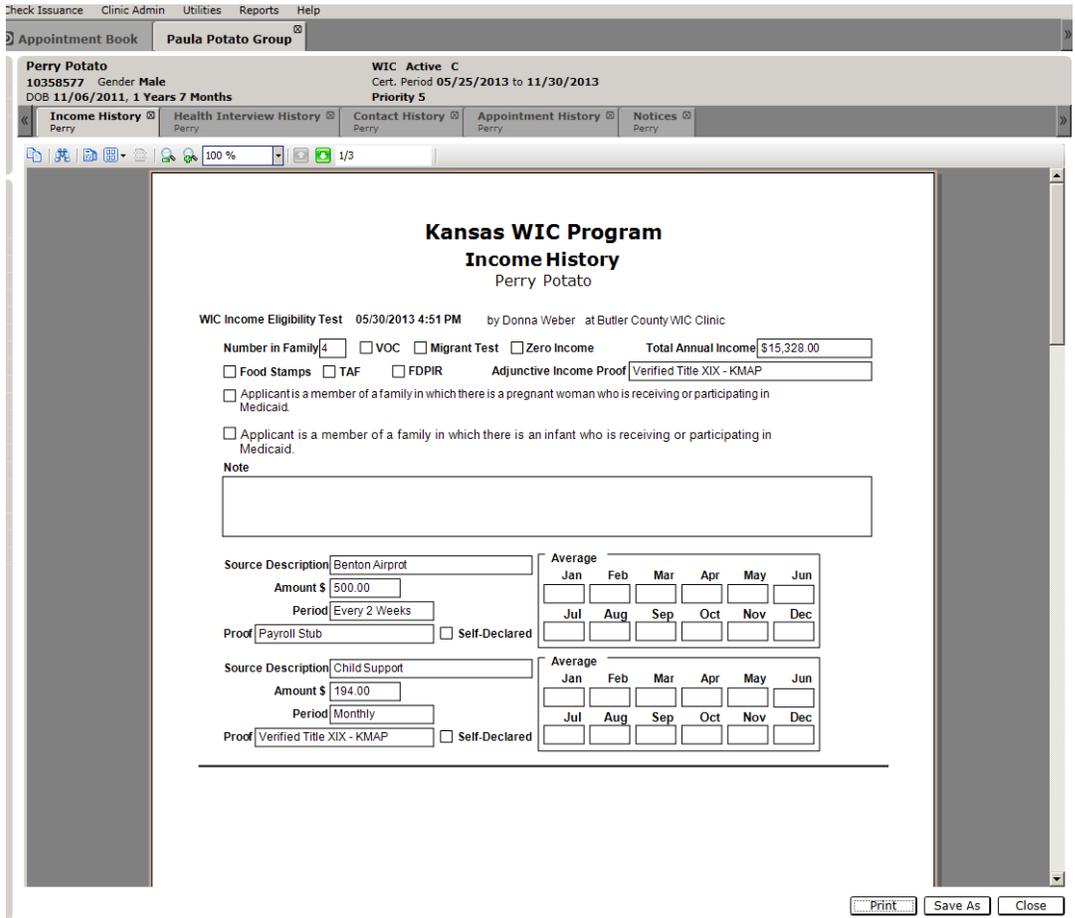
Household Smoking **No one else in household smoke**
 Medical Provider **Dr. Cooper**
 TV/Video Viewing **> 0 and <1 hour/day**



The ATOD History (Alcohol, Tobacco, and Other Drug) functions in the same way, except there is not a Quick Link to access the ATOD History. Use the Client drop down menu.

Income History

The Income History window allows you to view the income determined for the client in the past. If income has been determined more than one time, you will have to use the scroll bar at the right of the window to scroll down and see all of the information.



Measurement History

There are windows for both anthropometric measures and blood measures that show a list of dates and the measurement value. You probably will only use these if you want to print a list of all the measures. For instance you are going to print a growth chart to send with a referral and want a list of all the anthropometric to send along too. If you just want to look at a past value, you will probably find it easier to simply open the Anthropometric Measurements or Blood Measurements windows found in the Services dropdown menu.

Referral To History

Some of the client history windows display the client's certification periods in addition to a list of the contact recorded. This information is handy to know when viewing the number of occurrences that a particular contact is made and recorded during a specific certification period. The Referral To report is an example.

Complete these steps:

1. Retrieve Patrick Potato's record.
2. From the menu bar select **Client / View History / Referral To**. The Client Referral To History window opens.

| | | | | | |
|---|--|--|--|--|--|
| Patrick Potato 10357211 Gender Male DOB 04/04/2010, 3 Years 2 Months | | | WIC Active C Cert. Period 05/30/2013 to 11/30/2013 Priority 5 | | |
| Referral To History Patrick | | | Notices Perry | | |

| Referral Contacts | | | WIC Certification History | | | | |
|-------------------|--------------|--------------------------|---------------------------|------------|-----|----------|-----------|
| Date | Staff Person | Location | Eligibility Begin | End | Cat | Priority | High Risk |
| 05/30/2013 | Cindy Jones | Butler County WIC Clinic | 05/30/2013 | 11/30/2013 | C | 5 | |
| 11/16/2012 | Cindy Jones | Butler County WIC Clinic | 11/16/2012 | 05/31/2013 | C | 5 | |
| 04/26/2012 | Cindy Jones | Butler County WIC Clinic | 04/26/2012 | 10/31/2012 | C | 5 | |
| 09/30/2011 | Cindy Jones | Butler County WIC Clinic | 09/30/2011 | 03/31/2012 | C | 5 | |
| 03/22/2011 | Cindy Jones | Butler County WIC Clinic | 03/22/2011 | 09/30/2011 | C | 5 | |

| | | | | | |
|--------------------------------|--|--|------------------|--|--|
| Referral To History Patrick | | | Notices Perry | | |
|--------------------------------|--|--|------------------|--|--|

| Referral Contacts | | |
|-------------------|--------------|--------------------------|
| Date | Staff Person | Location |
| 05/30/2013 | Cindy Jones | Butler County WIC Clinic |
| 11/16/2012 | Cindy Jones | Butler County WIC Clinic |
| 04/26/2012 | Cindy Jones | Butler County WIC Clinic |
| 09/30/2011 | Cindy Jones | Butler County WIC Clinic |
| 03/22/2011 | Cindy Jones | Butler County WIC Clinic |

| Historic Referrals to Client | | | | | |
|------------------------------|---------------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Date | Service | Has | Referred | Applied | Note |
| 05/30/2013 | Blood Lead Screening | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 05/30/2013 | Child Support Enforcement | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 05/30/2013 | Community Resource List | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 05/30/2013 | Early Head Start | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 05/30/2013 | Food Stamps | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 05/30/2013 | Healthy Start | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 05/30/2013 | KanBeHealthy | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 05/30/2013 | Medicaid | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 05/30/2013 | Parenting Classes | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 05/30/2013 | TAF | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

3. As with some of the other history windows, you have to click the desired date to see the contacts made.

The display box at the bottom of the window will populate with referral information from the selected date.

4. Look at some of the past referrals for Patrick.
5. Keep his record open for the next example.

Risk Factor History

The Risk Factor History window allows you to view the risk factors determined for the client in the past. The screen opens up with a list of the dates of all saved Risk Assignment Contacts to the left. (Basic WIC Certification History is listed to the right.)

Patrick Potato **WIC Active C**
 10357211 Gender Male Cert. Period 05/30/2013 to 11/30/2013
 DOB 04/04/2010, 3 Years 2 Months Priority 5

Risk Factor History Patrick
 Referral To History Patrick
 Notices Perry

| Risk Assignment Contacts | | WIC Certification History | | | | |
|--------------------------|--------------------------|---------------------------|------------|-----|----------|-----------|
| Date | Location | Eligibility Begin | End | Cat | Priority | High Risk |
| 05/30/2013 | Butler County WIC Clinic | 05/30/2013 | 11/30/2013 | C | 5 | |
| 11/16/2012 | Butler County WIC Clinic | 11/16/2012 | 05/31/2013 | C | 5 | |
| 04/26/2012 | Butler County WIC Clinic | 04/26/2012 | 10/31/2012 | C | 5 | |
| 09/30/2011 | Butler County WIC Clinic | 09/30/2011 | 03/31/2012 | C | 5 | |

As with many of the history screens, click on the line for the date desired to view the associated risk factors.

Risk Factor History Patrick
 Referral To History Patrick
 Notices Perry

| Risk Assignment Contacts | |
|--------------------------|--------------------------|
| Date | Location |
| 05/30/2013 | Butler County WIC Clinic |
| 11/16/2012 | Butler County WIC Clinic |
| 04/26/2012 | Butler County WIC Clinic |
| 09/30/2011 | Butler County WIC Clinic |

| Risk Factors | | |
|--------------|------|--|
| Recorded | Note | Assigned Risk |
| 05/30/2013 | | Feeding Foods that Could be Contaminated |
| 05/30/2013 | | Feeding Sugar-Containing Fluids |

If there is a Note icon displayed, you can click it to view details such as the risk note written by staff or values for auto-calculated risk factors.

| Risk Factors | | |
|--------------|------|--|
| Recorded | Note | Assigned Risk |
| 05/30/2013 | | Feeding Foods that Could be Contaminated |
| 05/30/2013 | | Feeding Sugar-Containing Fluids |

Click on different certification dates for Patrick to see what risk factors he has been assigned.

Recorded **05/30/2013**

Feeding Sugar-Containing Fluids

Risk Assigned Based on MD Diagnosis

Note **sports drinks; choc syrup in milk**

Auto-Calc

Important! Only new risk factors are saved for a particular date. In this example, certification was a few months ago and a new risk factor was added recently. You would have to click on the risk factors for the cert date to see the original risk factors.

WIC Certification History Windows

There are two related WIC Certification History windows.

- WIC Certification by Certification Period
- WIC Certification on Certification Date

As the names imply, the WIC Certification by Certification Period window includes information from different days, all within the same certification period. WIC Certification on Certification Completed Date includes information from ONLY the day the certification was completed.

WIC Certification by Certification Period

For instance, if a client was certified on November 3 and then had a High Risk visit with the dietitian on December 16, this window would have information from both visits – And anything else that might have been entered on a different day within the certification period.

This is the window that you would use if there was a reason to print out a client's entire WIC history. (You would have to select every certification period if you wanted the entire history.)

Complete these steps:

1. **Continue to use Patrick Potato's record.**
2. From the menu bar **select Client / View History / WIC Certification by Certification Period.** The WIC Certification by Certification Period window opens.
3. Click on the most recent certification period for Patrick

Patrick Potato
10357211 Gender Male
DOB 04/04/2010, 3 Years 2 Months

WIC Active C
Cert. Period 05/30/2013 to 11/30/2013
Priority 5

WIC Certification by Certification Period
Patrick

| Eligibility Begin | End | Cat | Priority |
|-------------------|------------|-----|----------|
| 05/30/2013 | 11/30/2013 | C | 5 |
| 11/15/2012 | 05/31/2013 | C | 5 |
| 04/26/2012 | 10/31/2012 | C | 5 |
| 09/30/2011 | 03/31/2012 | C | 5 |

Kansas WIC Program
WIC Certification by Certification Period
Patrick Potato

Client 10357211 Potato, Patrick

Category C Eligibility Period 05/30/2013 to 11/30/2013
Caregiver Potato, Paula
Address 1232 Cantaloupe Circle Mailing
El Dorado KS, 67042
Telephone () - Message

Applied for WIC 05/30/2013 Initial Contact Date 11/15/2013
Certified Date 05/30/2013 by Darcy Thompson at Butler County WIC Clinic

Mother 10356860 Potato, Paula
Gestational Age 40 Mother On WIC On Kansas WIC

Risk Factors Assigned

| Recorded | Assigned Risk |
|------------|--|
| 05/30/2013 | Feeding Foods that Could be Contaminated |
| 05/30/2013 | Feeding Sugar-Containing Fluids |

Income Eligibility

| Test Date | Family | Income | Elig | Medical | Adjustment |
|-----------|--------|--------|------|---------|------------|
|-----------|--------|--------|------|---------|------------|

When the window is first opened, the display box at the top of the window displays a list of certification periods. The bottom display box is blank until a certification period is highlighted. The display box will have a scroll bar if the client has more than 3 certification periods.

Print Save As Close

4. Review the information contained in the history. Use the Scrollbar at the right to scroll down and view all of the information
5. If desired, click the [Print] button to print a hard copy of the history.
6. Close Patrick's WIC Certification by Certification Period history window but keep his record open for the next example.

WIC Certification on Certification Completed Date

For instance, if a client was certified on November 3 and then had a High Risk visit with the dietitian on December 16, this window would have information **only** for November 3. This is the window that you would use if there was a reason to print out a client's WIC history for a particular certification visit.

Complete these steps:

1. Continue to use Patrick Potato's record.

2. From the menu bar **select Client / View History / WIC Certification on Certification Completed Date**. The WIC Certification on Certification Completed Date window opens.
3. Click on the most recent cert period for Patrick.
4. Review the information, using the scrollbar to see everything. When you compare this window to the previous window, you see that only information connected with the certification appointment is included.
5. If desired, click the [Print] button to print a hard copy of the history.
6. Close Patrick's WIC Certification on Completed Date history window. Keep the Potato family record open for the last example.

WIC Termination

The WIC Termination Window shows a list of dates and reasons a client was terminated.

Use Patrick Potato. From the menu bar **select Client / View History / WIC Termination**. You can see that the only time that his record has been terminated was when he was recertified. That termination was done automatically by KWIC when he was recertified a few days before the end of his certification period.

Now click on Patrick's mother, Paula. You can see that she has been terminated when going from PG to BF and from BF to PP. Those terminations were done automatically by KWIC when she was recertified. You can also see that she was terminated at 6 months postpartum when she was a non-breastfeeding mother.

You will learn more about termination in a different module.

Kansas WIC Program WIC Termination History Paula Potato

| Event Date | Cat | Eligibility Begin | End | Event Description |
|------------|-----|-------------------|------------|---|
| 10/22/2010 | PP | 04/09/2010 | 10/31/2010 | Terminated for Cause: Non-breastfeeding mother, 6 months or more after delivery |
| 08/21/2010 | BF | 04/09/2010 | 04/30/2011 | Recertified with a category of PP |
| 04/09/2010 | PG | 10/15/2009 | 05/31/2010 | Recertified with a category of BF |

The End