

# Getting Started in KWIC

This module applies to the following security roles:

Receptionist

Clerk

RN/RD

KWIC Administrator

Breastfeeding Peer Counselor



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

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For training in KWIC, there is a fake on-line clinic to go with the training modules. If not already done, your supervisor needs to contact the State WIC Office to get a training account user name and password for your training. Use [wicstaffchange@kdhe.state.ks.us](mailto:wicstaffchange@kdhe.state.ks.us)

Your supervisor will help you log into the KWIC training environment to train for KWIC.

When you've trained enough to have security access into KWIC "production" (your real clinic), your supervisor will:

- Contact the State Agency to request your security clearance;
- Receive an email from the KWIC Help Desk with your username;
- Have you call the KWIC Help Desk at 866-516-3606 when you are ready to log into production KWIC for the first time. A Help Desk staff member will help you log in for the first time and set your personal password.

Note about security clearance and the training environment:

The module *Welcome to the Kansas WIC Program*, introduced you to security clearance levels that exist in KWIC. In the training environment, access is open to all windows of KWIC – there are no limitations based on security clearance. When you are finished training and start work in production Client Services you will only have access to windows based on your security clearance. See [ADM KWIC 07.02.01 Security Clearance](#).

## Objectives

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

1. Describe how to view explanatory messages for "grayed out" menu items and fields with a Red Asterisk or "Blue i".
2. List 2 purposes of the "Red Asterisk" on a KWIC field.
3. Identify what can be found on KWIC Outer Tabs.
4. Identify what can be found on KWIC Inner Tabs.
5. Use Find Client to retrieve a client record.
6. List the four potential uses of Electronic Signature

This module assumes that you have basic computer skills such as:

- Using a mouse and keyboard,
- Opening, closing, minimizing windows,
- Using drop-down menus and scroll bars.

# Introduction to KWIC

KWIC is the automated Kansas WIC system used to provide services to and track Kansas WIC clients.

- Client Services is the KWIC application that Locals Agencies use to conduct almost all WIC business.
- Local Vendor is the KWIC application used by the local staff members assigned to be Local Vendor Contacts for business related to WIC-approved grocery stores.

The first part of this module is an overview of the KWIC framework and how some things work in all areas of KWIC. The rest of the module presents information to get you started using KWIC.

## Standardization in KWIC

### Colors

KWIC screen colors are Microsoft Windows Standard. System Colors can be changed but if you change system colors, it will change colors in all programs on your computer. Some colors will always be the same, e.g. HR risk factors always pink.

Information in changing colors is on the Kansas WIC website for:

- [Windows 7](#) or
- [Windows XP](#)

Many people like “Classic Windows”.

### Validation

In KWIC, validation is “up front”. Instead of clicking and getting a pop-up error message, there are messages “up front” **before** you can make a selection. KWIC **validates or confirms** certain things before you can go on.



### Hover messages

Disabled choices are in pale font. The screen shot shows an example of a disabled “WIC Certification” drop-down menu item. When you “hover” your mouse over a pale disabled text, a “Why” hover message displays, as shown in the screen shot. Hover messages will also display for other situations, as you’ll learn later.



## Red Asterisk



Throughout KWIC you will see a red asterisk on certain fields. The red asterisk means:

- The field is required or
- Something needs fixed (for example, you have entered a 0 in Number in Family)

Client Last Name \*

Date of Birth \* 00/00/0000



There is a hover message available for each red asterisk to explain what is needed.

**Breastfeeding**

Breastfeeding Status \*

Date Breastfeeding Stopped  00/00/0000

Date Formula/Milk Introduced  00/00/0000

Date Solids Introduced  00/00/0000

Formula Type

Formula Name

Formula Consumed per day  ounces

The asterisks are “dynamic”. They disappear when a field is appropriately completed. On some screens, when one field is completed, a red asterisk will appear on a different field.

For example, in the top screen shot, Infant’s Health Interview – Breastfeeding Status has a red \*. Also, notice in the top screen shot the fields are gray.

Depending on the choice, different fields then have red \* - as in the lower screen shot. Once you select a Breastfeeding status you must enter the Date Breastfeeding Stopped. Once you enter that date, then the Date Formula/Milk Introduced displays a red \* and you must enter a date there. They are no longer gray.

**Breastfeeding**

Breastfeeding Status  Stopped Breastfeeding...

Date Breastfeeding Stopped \* 00/00/0000

Date Formula/Milk Introduced \* 09/26/2012

Date Solids Introduced  00/00/0000

Formula Type \*

Formula Name

This is all an example that the “validation fields are dynamic”. There are other screens with this same functionality, but you’ll easily understand when you see them.

**Save:** The window’s Save button is disabled (pale) until the required fields are completed. You are still expected to complete other fields that do not have a red asterisk. These are just the absolutely essential fields.

Save

Cancel

☹ But what if Save is still disabled? ☹

Occasionally you’ll find that you’ve completed everything and there are no Red Asterisks on any field, but the Save Button is **still** disabled. What do you do?

Tab (or click) out of the field so the cursor is in a different field from the one you just changed. That should enable the Save Button.

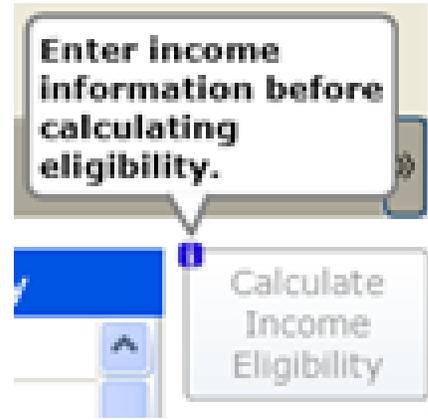
## Blue “i”



The blue “i” on certain fields is for information. The blue “I” is sometimes a disabled field and appears in pale font.



Hover your mouse over the “i” to get a hover message.



In summary:

- Take your time.
- Look and read the information on the screens.
- Use the hover messages.

## KWIC Framework

When you log into KWIC you can see the basic framework of KWIC.

**Title Bar** - Identifies KWIC application (Client Services), Version number, and Clinic name, along with Minimize, Maximize and Close buttons.

**Menu Bar** – Contains drop-down menus for windows you’ll use in KWIC

**Outer Tabs** – Contains:

- Find Client.
- Appointment Book
- Any open Family Groups
- Any open Reports

**Inner Tabs** are the next part of the KWIC framework. You’ll see those later.

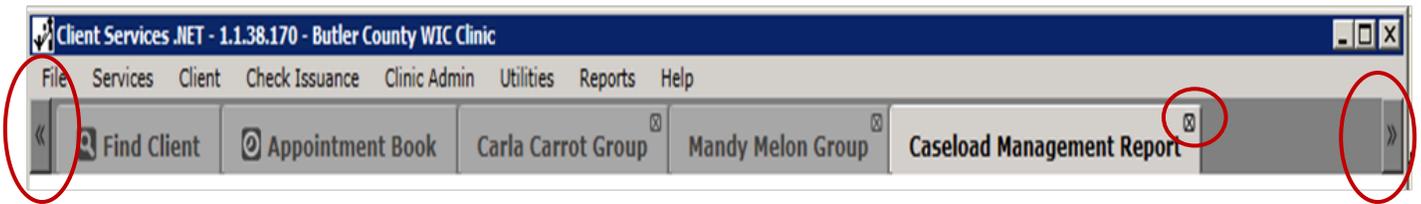


## Outer Tabs

The first two outer tabs are Find Client and Appointment Book. They are always open. In the following screen shot, the Carla Carrot and Mandy Melon Family Groups are open, as well as the Caseload Management Report. The pale outer tab is what you are viewing. If the following screen shot was a full screen, which window would you be viewing? Right – the Caseload Management Report.

## Navigating Outer Tabs

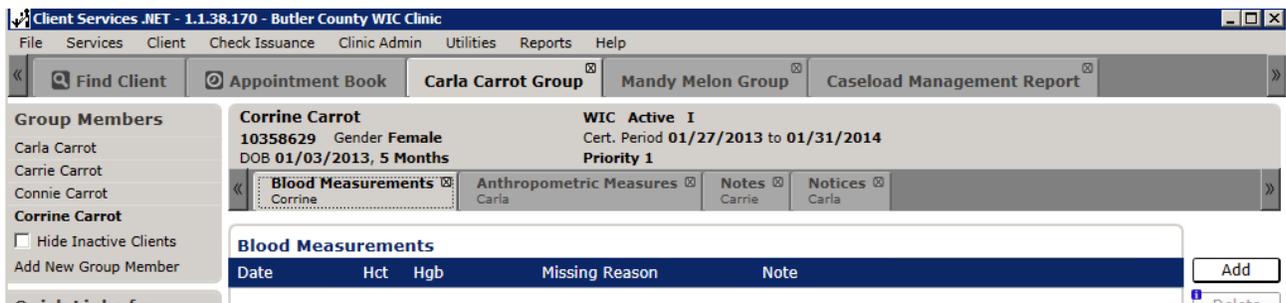
- You can have multiple family groups and reports open at a time. Click the tab to navigate to the desired open window.
- Use the Arrow buttons on the left and right ends to scroll - although you might not ever have that many records open.
- New outer tables open on the **right**.
- Click the tiny X on the tab to close the tab.  The icon is small so it may take some practice to regularly hit the right spot. It turns red if you are “on target”.



## Inner Tabs

Inner Tabs are next in the KWIC framework. Inner tabs are client-specific windows for the family group you have open. Notice the Client First Name, Middle initial on the inner tab. Caution:

- Be careful to notice the name on the inner tab so you are sure you are working with the right client.
- Even though you can have lots of inner tabs open, it can be confusing. Close a tab when you are done with it.



## Navigating Inner Tabs

Navigating Inner Tabs is the same as navigating Outer Tabs **except** new inner tabs open on the **left**.

## Group Members List

When you have a family group open, KWIC framework always displays the Group Members list in the upper left corner. These are family group members who are or have been WIC clients. For example, if a mother has never been enrolled for herself, her name will **not** display in the Group Members list.

- The selected client is in bold font.
- Click on a different name to work with that family member's record.
- For a very long list, you may choose to click the Hide Inactive Clients in the Group Members list. (But they will still display on the Notices tab.)
- The "Add New Group Member" link automatically opens Apply for WIC with the family/Caregiver section already populated. Learn more in the *Apply for WIC* module.

The screenshot shows the KWIC software interface for the Butler County WIC Clinic. The main window displays the 'Group Members' list for the 'Carla Carrot Group'. The list includes Carla Carrot, Carrie Carrot, Connie Carrot, and Corrine Carrot. The 'Carla Carrot' entry is highlighted in bold. Below the list, there are 'Quick Links for Carla Carrot' such as Client Homepage, Notes, Dual Participation, Anthro Meas, Blood Meas, Health Interview, Risk Factors, Nutrition Education, Referrals, Change Category, Record New Pregnancy, Survey, History-Health Interview, History-Nutrition Education, History-Issuance, Flowsheet, Demographics, Notices, Reminders, Rights & Responsibilities, and Sign for Checks. The main area shows a detailed record for Carla Carrot, including her DOB (10/24/1987), WIC Category (BF), and eligibility end date (01/31/2014). Below this, there is a table comparing her record with other group members: Carrie, Connie, and Corrine. The table includes columns for Next Appointment, Proof of Residency, Proof of Income, Proof of Identity, Proof of Caregiver Identity, Dual Participation Test, Basic Contact, Hct/Hgb, Special Authorization, Survey, End WIC Eligibility Letter, Referrals, Immunizations, and Cautions.

	Carla DOB 10/24/1987 WIC Category BF Elig. End 01/31/2014	Carrie DOB 12/13/2009 WIC Category C Elig. End 05/31/2013	Connie DOB 08/09/2011 WIC Category C Elig. End 07/31/2013	Corrine DOB 01/03/2013 WIC Category I Elig. End 01/31/2014
Next Appointment	<a href="#">Schedule Appointment</a>	<a href="#">Schedule Appointment</a>	<a href="#">Schedule Appointment</a>	<a href="#">Schedule Appointmen</a>
Proof of Residency	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>
Proof of Income	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>
Proof of Identity	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>
Proof of Caregiver Identity	N/A	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>
Dual Participation Test	<a href="#">Tested 01/27/2013</a>	<a href="#">Tested 11/03/2012</a>	<a href="#">Tested 01/27/2013</a>	<a href="#">Tested 01/27/2013</a>
Basic Contact	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>
Hct/Hgb	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Needed</a>	<a href="#">N/A</a>
Special Authorization				
Survey	<a href="#">N/A</a>	<a href="#">N/A</a>	<a href="#">N/A</a>	<a href="#">N/A</a>
End WIC Eligibility Letter	<a href="#">N/A</a>	<a href="#">N/A</a>	<a href="#">Printed 05/09/2013</a>	<a href="#">N/A</a>
Referrals	<a href="#">Referrals</a>	<a href="#">Referrals</a>	<a href="#">Referrals</a>	<a href="#">Referrals</a>
Immunizations	<a href="#">N/A</a>	<a href="#">Immunization</a>	<a href="#">Immunization</a>	<a href="#">Immunization</a>
Cautions	<a href="#">See notes</a>		<a href="#">See notes</a>	

## Quick Links

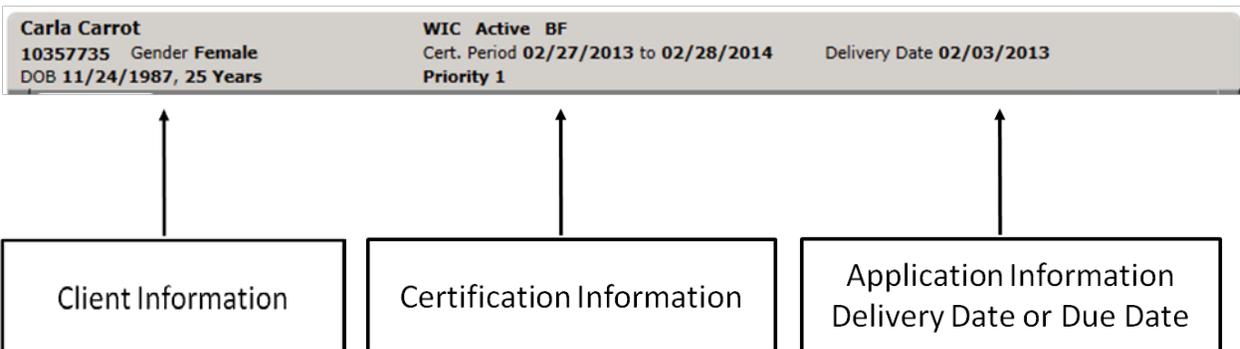
All the KWIC windows can be opened from the drop-down menus (e.g. Services). Quick Links are just commonly used KWIC windows to save you a little time compared to going to the drop-down menus. The Quick Links title includes the Client Name so you can be sure what client you are working with. Quick Links are specific to category and status, i.e. the list changes depending on the client category and status.

## Client Header

The Client Header is the bar to the right of the Group Member list. It displays information about the client you have selected. (Note Carla Carrot is in bold font in the Group List and is the client displayed in the Client Header.)

The Client Header has 3 distinct sections.

- The **Client** section shows details about the selected client, including **Name, Client ID, Gender, Date of Birth and Age**.
- The **Certification** section shows details about the client's current certification, if there is one. It includes **Status, Category, Cert Period, Priority, and high risk status**. (For a high risk client, a pink "HR" displays)
- The **Application** section shows details about the client's pending application, if there is one. It shows the **Pending Category**. It also shows the **Delivery Date or Due Date** for the Pending Category if there is one or for the Certification if the client is not Pending.



## Client Status



A client in KWIC always has one and only one client status at any particular time, e.g. **Active**. Over time a client's status will change based on the completion of certain business events. The Client Status affects the ability to print checks and to be able to open and complete certain WIC service functions.

**Appendix A – Client Status List** is a list of client statuses, including when each status is assigned and whether or not checks can be issued. **Keep the status information handy for a reference as you complete the training modules.**

## Pending Category

Pending categories are assigned when the client is transitioning from the current client category to another category. The pending category is temporarily assigned until the client is found eligible in the new category. It displays in red in the right section of the Client Header. Appendix B – Pending Categories is a chart of the new pending categories in KWIC and when those categories are assigned, including when checks may still be issued.

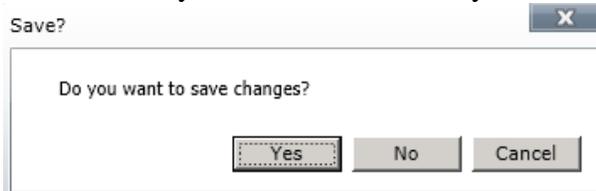
<b>Kathy Kale</b> 10358817 Gender Female DOB 06/27/1989, 24 Years	<b>WIC Applicant</b> Client not Certified	<b>WIC PG</b> Due Date 11/18/2013
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## Save & Cancel

Save and Cancel buttons are in the lower right corner of each screen. You've already ready that the Save button is disabled until you've made some change in the screen. Once you've saved, then click Cancel to close the screen. (Or click the tiny "x" on the tab.)



Obviously, Cancel is the button you use if you've entered something and decide that you do not want to save. If you have made a change and click Cancel without Saving first, this message will appear.

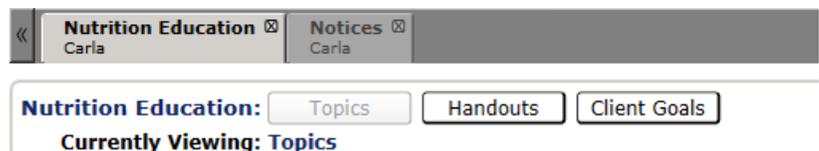


**Hint: You might find KWIC works faster if you hit Cancel and then choose Yes to save instead of just clicking on Save.**

## Navigational Buttons

There are a few KWIC windows that are grouped together because the functions are related. Navigational Buttons allow the user to switch between those related windows. The button for the current screen is disabled (pale). I.e., you are already there so cannot select it. Buttons for the other screens are enabled (dark) because you can select them. Navigational buttons are displayed on:

- Nutrition Education inner tab
- Health Interview inner tab for women
- Some of the Clinic Admin screens, like Clinic Management.



## Add & Delete Buttons

Many KWIC windows contain Add and Delete buttons. They all work the same, so we'll look at the example from Referrals. Notice that only the Add button is enabled. Delete is disabled (pale).

Date	Service	Referral Status				Note
		Has	Referred	Applied	N/A	
06/28/2013	Child Support Enforcement	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
06/28/2013	Food Stamps	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
06/28/2013	Medicaid	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
06/28/2013	TAF	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Click Add to get a blank line. Now you can enter the desired information on the new blank line. If you do not need the new line after all, either use the Delete button to delete it or click Cancel. **You cannot save if there is a blank line on the window.**

Date	Service	Referral Status				Note
		Has	Referred	Applied	N/A	
06/28/2013		<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
06/28/2013	Child Support Enforcement	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
06/28/2013	Food Stamps	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
06/28/2013	Medicaid	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
06/28/2013	TAF	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

**Retrieve Barbara Broccoli's record.** Open Referrals from Quick Links. Add a line and make a referral to the dental clinic. Close her record.

# Starting to Use KWIC

## *Back to the Menu Bar*



Before we move into actually using KWIC, let's revisit the Menu Bar. The Menu Bar is used to access all the areas of Client Services besides Find Client and the Appointment Book. It is available on every KWIC window. In general, the menus are:

- **File** – another way to exit (close)KWIC
- **Services** – screens used to provide WIC services.
- **Client** – specific functions performed for an individual client.
- **Check Issuance** – check issuance functions as well as check histories.
- **Clinic Admin** – functions that are performed at the clinic level (for example, Class Management and No Show Management).
- **Utilities** – functions in which clinics can make in their local Client Services application, including setting up the Appointment Book calendar.
- **Reports** – numerous reports available to clinic staff.
- **Help** – provides access to the KWIC On-Line Help and Test Printing.

## *Find Client Tab*

The Find Client window opens when you first log into KWIC. You will use Find Client often because this is how you search for and find your client's records or files. (If a client has an appointment, you will also often just open client records from the Appointment Book. That will be presented in the *Appointment Book* module.) Clients are displayed as groups. A group can be a Caregiver alone or include other members who also receive WIC services (e.g. a family).

### **Using the Find Client Tab to Search for Client Files**

- The white boxes at the top of the screen are search fields. To move to different fields, use the Tab Key or use your mouse to click on the field.
- If you know the client's ID, enter it for a quick search. If you don't know the client's ID, enter several letters of their last name. If you just use 2-3 letters, you will be less likely to spell it wrong, but the search will take longer. You can speed up the search by using the client's full name; however, remember the computer is very specific.

- For example, if you type ANDERSON and the client spells their name ANDERSEN, the computer will not find them. If you type ANDER, the computer will find both spellings and you will be able to select the correct client from the list. This is the best practice and will help reduce the chance of entering a client twice.
- The Display Inactive Groups box is marked by default to help eliminate re-entering an existing client. If you are sure a client is active, you can save time searching by “unchecking” the box. KWIC will then only search through active groups.



- **Enter “Broc” in the Caregiver Last Name search field.** Click the [FIND] button. KWIC will search for and display all client groups where one or more individuals in the group match the search criteria.

Please “click along” in your training account as you read this part of the module.

Caregiver	Client	DOB
Broccoli, Barbara	Broccoli, Barbara	10/25/1
	Broccoli, Billy	11/29/2
	Broccoli, Britney	02/24/2
	Broccoli, Brent	07/27/2
Broccoli, Barbara	Broccoli, Barbara	06/04/1

You should find the both the Barbara **Broccoli** and Barbara **Broccoli** groups.) You can see how easily you might have missed the second group if you tried to enter the whole name as you assumed it was spelled.

- To provide services for the client, highlight the client’s row in the display box. You can retrieve the record in three ways:
  - Click [Retrieve] or
  - Press the [Enter] on the key board or
  - **Double Click** the highlighted line.



**NOTE:** When you search by any of the criteria, all members of the client’s family or group are displayed.

In the *Appointment Book* module you will learn how you can also open a client record from the Appointment Book window instead of using Find Client.

**If you can’t find a client, consider other possibilities for more searching (detailed in the module, *Apply for WIC*). Never create a new record if group or individual record already exists in KWIC – either in your clinic or somewhere else in Kansas.**

## **Skill Builder**

### **Practice Searching for Clients**



**Complete the following activities:**

1. Using the **Caregiver** Last Name field, search for **Alice Artichoke**.
2. Using the **Client** Last Name field, search for **Larry Lettuce**.
3. Search for a client using Client ID: **10357800**. Searching by Client ID also displays the entire group, but the client having the specified ID will be highlighted with the blue bar.
4. Searching by Category. (You won't use this very often in real life, but do it for practice.)
  - a. Search for all Breastfeeding clients whose last name starts with C. Notice how long it takes.
  - b. Clear and search for all Breastfeeding clients. Notice how long it takes. (FYI, there's only about 300 clients in the training environment clinic.)



**NOTE:** As you can see, there are many ways to search for clients. Always remember to enter enough information, so you narrow the search and it is faster. Unfortunately the more you enter, the greater the chance of misspelling so be careful and search thoroughly!

## Notices Tab

Use Find Client to retrieve the Barbara Broccoli record again. KWIC opens to the **Notices** tab. (This screen shot before shows just the client header and the Notices tab parts of the screen.)

Barbara Broccoli		WIC Active PG		Due Date 09/27/2013		
10357800 Gender Female		Cert. Period 02/20/2013 to 11/30/2013				
DOB 10/25/1988, 24 Years		Priority 1				
Notices Barbara						
	<b>Barbara</b> DOB 10/25/1988 WIC Category PG Elig. End 11/30/2013	<b>Billy</b> DOB 11/29/2009 WIC Category C Elig. End 08/31/2013	<b>Britney</b> DOB 02/24/2011 WIC Category C Elig. End 08/31/2013	<b>Brent</b> DOB 07/27/2012 WIC Category I Elig. End 07/31/2013		
Next Appointment	07/30/2013 CP 11:00 AM	07/30/2013 RC 11:00 AM	07/30/2013 RC 11:00 AM	07/30/2013 CP 11:00 AM		
Proof of Residency	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>		
Proof of Income	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>		
Proof of Identity	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>		
Proof of Caregiver Identity	N/A	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>		
Dual Participation Test	<a href="#">Tested 02/20/2013</a>	<a href="#">Tested 02/20/2013</a>	<a href="#">Tested 02/20/2013</a>	<a href="#">Tested 02/20/2013</a>		
Basic Contact	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>		
Hct/Hgb	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Complete</a>	<a href="#">Needed</a>		
Special Authorization						
Survey	N/A	N/A	N/A	N/A		
End WIC Eligibility Letter	N/A	N/A	N/A	<a href="#">Needed</a>		
Referrals	<a href="#">Referrals</a>	<a href="#">Referrals</a>	<a href="#">Referrals</a>	<a href="#">Referrals</a>		
Immunizations	N/A	<a href="#">Immunization</a>	<a href="#">Immunization</a>	<a href="#">Immunization</a>		
Cautions						

### Important Things to Notice:

- There is a column for each family group member on the Notices tab. There is basic information (Date of Birth, Category, and Eligibility End Date) about each family group member directly below their name. If there are more family members than fit, a scroll bar displays.
- The client's **Next Appointment** displays at the top of each column (if there is a future appointment. This is where you look when a client calls the local agency to ask, "When is my next appointment?")
  - Clicking on the Next Appointment cell will open the Appointment Book to that appointment. For example, if you need to change the appointment.
  - If there are no future appointments scheduled for the client, a "Schedule Appointment" link displays. Clicking this link takes you to the [Schedule Appointment](#) current day in the Appointment Book.

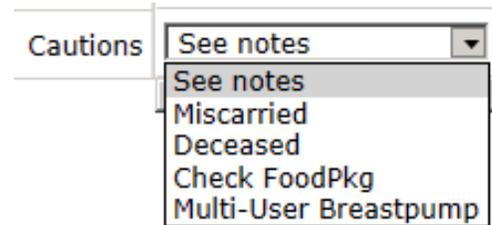
3. There are Needed links in each client's column for information that is not yet entered in the client's record. Future modules will discuss adding this information in the appropriate windows.
4. If a client is in a current certification period and is being recertified many of the links on the Notices tab will display as Complete because they were completed when the client was certified.
5. Some cells display N/A. This means that the information is not required for that particular client. For example, immunization information is not gathered for women.
6. Information previously entered will display as Complete or with the date the information was entered.

## Cautions



Cautions provide an area for WIC staff to provide warning notices to each other about a particular client. There are five cautions available. "See Notes" and "Check FoodPkg"

means **you should read notes or check the food package** before proceeding with the client. If a multi-user breastpump is issued, staff are to add the Multi-User Breastpump caution to remind staff to ask the client about it at every WIC visit. "Miscarried" and "Deceased" are available for use to allow WIC staff to avoid gaffs and to be more compassionate.



**Skill Builder**  
**Practice Using the Notices Tab**



**Complete the following activities:**

1. Using the Caregiver Last Name field, retrieve the record for **Barbara Broccoli**.
  - a. Notice Barbara's name in the **Title Bar** and the **Client Header**.
  - b. Click on Billy's name in the **Group Member's** area. Notice that the **Title Bar** and **Client Header** change to Billy's information. This helps you keep track of which client you have selected.
  - c. Click on different **Quick Links** and links in the **Window** area to practice moving around in KWIC.
  - d. What are two ways to close the Broccoli family record? Answer: Clicking the x on the Broccoli family outer tab or clicking on the **[Cancel]** button for every open Broccoli inner tab. Pick one of these ways to close their family record.
  
2. Retrieve the record for **Connie Celery**.
  - a. Notice that she and Caleb still need to present certain proofs.
  - b. Pretend Connie is going to be issued a multi-user breastpump today. Add the appropriate Caution and Save.
  - c. Close the Celery family record.
  
3. If you have any other family records open, close them all.

## The Flowsheet (Care Plan)

The Flowsheet is the key to organizing a client's care plan/planned WIC events and to:

- ❑ Make sure the client receives the right type of appointment.
- ❑ See the type of appointment to schedule for a client in any given month as recommended by the nurse or RD (the Certified Professional Authority – CPA)

This is a basic explanation of the flowsheet to get you started. Intensive flow sheet training is also available on the [WIC website training page](#) but is not required at this time.

<b>Carol Cabbage</b> 10358597 Gender Female DOB 06/14/1982, 31 Years		<b>WIC Active BF</b> Cert. Period 02/05/2013 to 12/31/2013 Priority 1
Flowsheet Carol	Notices Carol	
	<b>Carol</b> DOB 06/14/1982 WIC Category BF Elig. End 12/31/2013	<b>Christopher</b> DOB 12/02/2012 WIC Category I Elig. End 12/31/2013
February, 2013	New Certification	New Certification
March, 2013		
April, 2013	Nutrition Ed +	Nutrition Ed +
May, 2013		
June, 2013	Check Pickup	Check Pickup
July, 2013		
August, 2013	Mid-Certification	Mid-Certification
September, 2013		
October, 2013		
November, 2013	Nutrition Ed +	Nutrition Ed +
December, 2013		
January, 2014		
February, 2014	Recertification	Recertification

## About the Flowsheet

The Flowsheet is a care plan for the client. It is also a tool that provides a line of communication between staff members for a client's **planned** contacts for the future. The Flowsheet can be adjusted, as the client's needs change throughout their period of eligibility. Because it is a plan, not a document of what actually happened, there is no need to go back and make changes if something was actually done in a later month.



Because this is the plan for care, staff should view the completed Flowsheet before making an appointment for a client.

- ❑ When a certification is completed, the Flowsheet displays the months to reflect the longest eligibility period of a member of the group. The appointment type listed on the Flowsheet will automatically populate the appointment type on the appointment book.
- ❑ The dietitian or nurse (i.e. Competent Professional Authority or CPA) uses the Flowsheet to establish a plan for future WIC services for each member of the group.
  - The CPA normally establishes the Flowsheet after the certification has been completed.
  - The CPA will set up the Flowsheet based on planned secondary education appointments, and concurrent check pickup.

- Some clinic may have a procedure in which the clerk will start the Flowsheet by adding a visit in the next month when the clerk identifies that additional proofs are needed.
- When the Flowsheet is established, the Appointment Type on the Appointment Book tab defaults to the appointment type set up in the Flowsheet for that month in which the appointment is being made.
- If there are months in the Flowsheet left blank, the Appointment Type on the Appointment Book tab will default to CP (check pick-up) for the month that was left blank.

**Additional Information Available on the Flowsheet**

- Any Special Needs for the group are indicated in red under Flowsheet tab. If the staff wants specific information about the group to be viewed every time the Flowsheet is opened, enter the information in the Special Needs field on the Demographics tab. You can click on the Demographics tab to view the client’s special need. For example, “needs morning appointments.”
- Any Interpreter needs for the group. Interpreter will appear in red under the Flowsheet tab when information is entered on Demographics Tab in the Interpreter box.

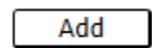
**To Add a Flowsheet Appointment Type for a Month:**

1. Click in the white area of the Flowsheet month for which you would like to establish a planned type of appointment.
2. Select the type of appointment planned for that month from the drop down box.

**To clear a Flowsheet field,** click in the desired field and use the **Delete** key on the keyboard to clear the appointment type.



**To add more months to the end of the Flow sheet,** click the **[Add]** button.



The Flowsheet display reflects the last month of the client in the group with the longest eligibility period. Staff will find this useful when a client’s eligibility period is extended due to pregnancy as in the screen shot on the previous page.

## Flowsheet Basics to Remember



1. Check **each** family member's Client Header to see if low or high risk.
2. Complete the Flowsheet (care plan) for the **full** certification period, **but not longer**.
3. Recommended practice: Look at the Eligibility End date and start by adding "Recertification" in the month eligibility ends. If the person is not eligible to be recertified, leave the field for the last month in the certification period blank.
4. When planning Midcertification visits for I and BF women, remember KWIC only allows the Midcertification to be completed between 5 ½ months and 10 months of age/after delivery. E.g., do not plan for a Midcertification visit at 4 months of age.
5. Add appropriate secondary nutrition education, e.g. High Risk(RD), Class, Nutrition Ed-Individual, Nutrition Ed + (i.e. interactive center)
6. Understand any local clinic special rules/situations, e.g.
  - a. "All breastfeeding moms and babies are scheduled back at 1 month after certification."
  - b. Consultant RD schedule.
7. Do the best you can to adjust for different plans for family members with different certification periods. Children can be recertified up to 2 months early if the caregiver would like to better align certification periods for their family members.

## Flowsheet Examples

Example 1: The CPA certifies a new child (John) in late June so the Eligibility End Date is 12/31. The child is at high nutritional risk and needs to be scheduled for an appointment with the dietitian for the secondary nutrition education contact. The CPA decides to issue him 3 months worth of checks and marks High Risk (RD) on the flow sheet for September and then marks Recertification on the flowsheet for December. The child will be scheduled to see the RD in September and will get more checks at the same visit. When the

<b>John Cherry</b>		<b>WIC Active C</b>								
10358835	Gender <b>Male</b>	Cert. Period <b>06/28/2013 to 12/31/2013</b>								
DOB <b>02/16/2012</b> , 1 Years 4 Months		<b>Priority 3 HR</b>								
« Flowsheet ☒	Notices ☒									
John	John									
<table border="1"> <tr> <td colspan="2"><b>John</b></td> </tr> <tr> <td colspan="2">DOB <b>02/16/2012</b></td> </tr> <tr> <td colspan="2">WIC Category <b>C</b></td> </tr> <tr> <td colspan="2">Elig. End <b>12/31/2013</b></td> </tr> </table>			<b>John</b>		DOB <b>02/16/2012</b>		WIC Category <b>C</b>		Elig. End <b>12/31/2013</b>	
<b>John</b>										
DOB <b>02/16/2012</b>										
WIC Category <b>C</b>										
Elig. End <b>12/31/2013</b>										
June, 2013	<input type="text"/>									
July, 2013	<input type="text"/>									
August, 2013	<input type="text"/>									
September, 2013	High Risk (RD)									
October, 2013	<input type="text"/>									
November, 2013	<input type="text"/>									
December, 2013	Recertification									

caregiver returns for the RD visit and checks in September, the child will be scheduled for a recertification appointment in December.

Example 2: Same child but different clinic situation. In this clinic the consultant RD only comes every other month (even months). This CPA must make a care plan that reflects the RD visit schedule. The CPA marks High Risk (RD) on the Flowsheet for the child in August and only issues 2 months of checks. The child will need to return in December for recertification so the CPA marks Recertification in December. The CPA knows that checks will need to be issued sometime between August and December because no more than 3 months of checks can be issued in August. So the options are to

- Issue 3 months of checks in August and have a Check Pickup appointment in November or
- Issue only 2 months of checks in August and have a Check Pickup appointment in October.

The screenshot shows a patient record for John Cherry. At the top, it lists his name, ID number (10358835), gender (Male), and date of birth (02/16/2012, 1 Year 4 Months). It also indicates his WIC status as 'Active C' with a certification period from 06/28/2013 to 12/31/2013, and a priority of 3 HR. Below this, there are tabs for 'Flowsheet' and 'Notices'. The main area shows a dropdown menu for the month of August 2013, with 'High Risk (RD)' selected. Other months listed include June, July, September, October, November, and December 2013, with their respective actions: 'Check Pickup' for October and 'Recertification' for December.

Month	Action
June, 2013	
July, 2013	
August, 2013	High Risk (RD)
September, 2013	
October, 2013	Check Pickup
November, 2013	
December, 2013	Recertification

The CPA decides the second option is better. The caregiver will be given an appointment in August for a RD appointment and check pickup. When the caregiver returns in August, the appointment with the RD will be completed and she will receive checks and a new appointment letter with an appointment for check pickup in October. When she returns in October for checks, she will receive checks and an appointment letter for a recertification in December.

These were easy examples with just one family member. You can learn more later by completing the Intensive Flowsheet Training.

## Skill Builder The Flowsheet



Caregiver/Client	Practice Activity
Banana, Brenda	Brenda called to find out when her children have their next appointments. Retrieve the family record and use notices to view the next appointment.
Cabbage, Carol Cabbage, Christopher  <div style="border: 1px solid gray; padding: 5px; width: fit-content;"> <p><b>Group Members</b></p> <p><b>Carol Cabbage</b></p> <p>Christopher Cabbage</p> <p><input type="checkbox"/> Hide Inactive Clients</p> <p>Add New Group Member</p> </div> <p>Hint: To change to Christopher's Client Header, click his name in the Group Members box.</p>	<p>Retrieve the family record and open their Flowsheet window. Review the Flowsheet and assess if both are correct using these steps from page 18.</p> <ol style="list-style-type: none"> <li>1. What is <b>each</b> family member's risk level, as shown on each client's Client Header?</li> <li>2. Is the Flowsheet (care plan) for the <b>full</b> certification period, <b>but not longer</b>?</li> <li>3. Is "Recertification" added in the month eligibility ends? Except the last month field should be left blank if the person is not eligible to be recertified.</li> <li>4. As an I and BF women they need midcertification visits planned. Is it planned for a month between 5 ½ months and 10 months of age/after delivery?</li> <li>5. Is there a plan for appropriate secondary nutrition education, e.g. High Risk (RD), Class, Nutrition Ed-Individual, Nutrition Ed + (i.e. interactive center)?</li> </ol> <p><i>Answers:</i></p> <ol style="list-style-type: none"> <li>1. <i>Both low risk</i></li> <li>2. <i>Yes, for both</i></li> <li>3. <i>Okay for Christopher. As a BF woman, Carol is not eligible to be recertified so the last month for her certification period should be left blank.</i></li> <li>4. <i>Okay for both.</i></li> <li>5. <i>Christopher's plan for secondary nutrition education is okay. But notice there is no secondary nutrition education for Carol between her certification and midcertification time frame. Her care plan should include a class, NEi or NE+. Her plan after the midcert does include secondary nutrition education correctly.</i></li> </ol>

## Reminder Window

- ❑ Open from Quick Links or the Client drop-down menu.
- ❑ Use the reminder tab to enter reminders for both the client and the staff. Some reminders are automatically generated by the system.
- ❑ Checking the [Done] checkbox on a reminder will remove it from the display when the Save icon is Clicked.

**Alice Artichoke** WIC Active BF  
 10358566 Gender Female Cert. Period 07/01/2013 to 06/30/2014 Delivery Date 06/30/2013  
 DOB 12/05/1983, 29 Years Priority 1

Reminders Alice Notices Alice

**Client Reminders**

Date	Done	Client Reminder
06/09/2013	<input type="checkbox"/>	Completed Diet History
06/09/2013	<input type="checkbox"/>	Proof of Address
06/09/2013	<input type="checkbox"/>	Proof of Income
06/09/2013	<input type="checkbox"/>	Proof of ID for Caregiver
02/04/2013	<input type="checkbox"/>	Proof of ID for Infant/Child

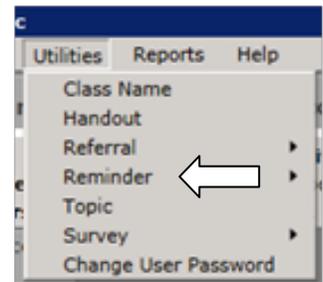
**Staff Reminders**

Date	Done	Staff Reminder
06/28/2013	<input type="checkbox"/>	SMOKER

SMOKER  
 Breast Pump Issued  
 Breastfeeding Peer Counselor  
 FORMER SMOKER  
 M&I Nurse  
 M&I Social Worker  
 Needs Diet Record Form  
 NON-SMOKER  
 Print Term Letter  
 Reassess Income  
 Recheck Address/telephone  
 Recheck height/weight  
 Recheck HGB/HCT  
 Recheck weight gain  
 Review Breast Pump Agreement  
 Rights and Responsibilities  
 SMOKER - REFERRED  
 Voter Registration

Add Delete Save Cancel

- ❑ Any number of reminders can be added or deleted by clicking the [Add] or [Delete] buttons.
- ❑ Additional client and staff reminders can be entered in Utilities-reminders by the KWIC Administrator.



## System generated reminders

- ❑ Marking any of the appointment reminder fields on the Appointment Book adds a corresponding Client Reminder.

## To Add Reminders

1. Determine if it's a Client or Staff Reminder.
2. Click the [Add] button.
3. Select the reminder from the drop-down list.

**To Delete Reminders**, select the reminder to be deleted and click the [Delete] button.

## Electronic Signatures

KWIC has the capability to capture electronic or manual signatures for the following items.

1. Rights & Responsibilities (R & R)
2. Check stubs
3. Self-Declaration of Income (includes Zero Income)
4. Breastpump User Agreement

The basic use of electronic signatures is the same for all the items so it is presented here. Of course the exact use of each item has not been presented yet – you will learn more in future modules.

A signature pad must be installed on a computer in order to use the electronic signature function of KWIC. Talk to your supervisor to see which computers have signature pads in your clinic.

The training environment does not have electronic signature functionality so you'll just read about it in the module. When you observe in clinic, make special note of electronic signature use.

## Rights & Responsibilities Form

After opening the family group you are certifying, you will select Rights & Responsibilities from Quick Links or the Services drop-down menu.

Then the Rights & Responsibilities box comes up.

This pop up box defaults to all clients in the family group.

Click OK.

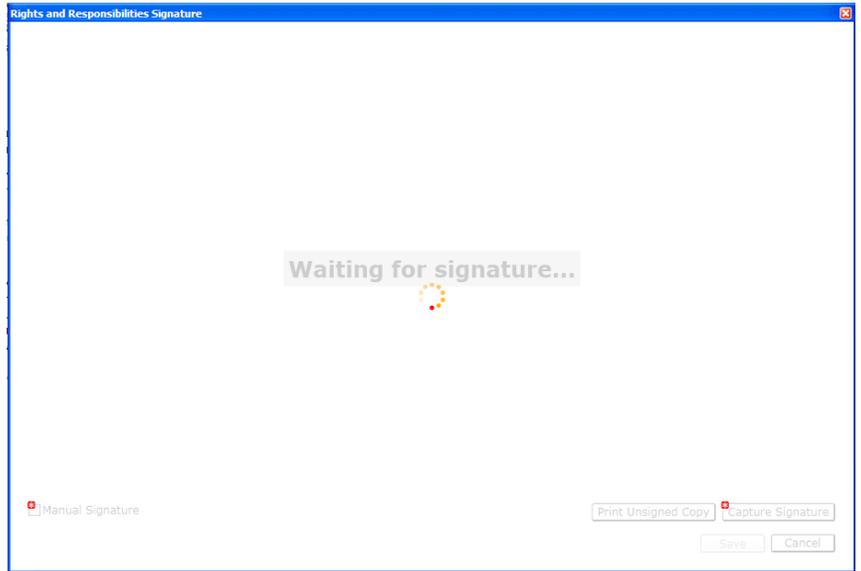
The next screen will let you either capture the client's signature or indicate the form will be signed manually. You have to check either Manual Signature or Capture Signature on this screen. In general, you will only use Manual Signature if the signature pad is not working or not installed at your computer. (You also must use Manual Signature in the training environment.)

Gettir

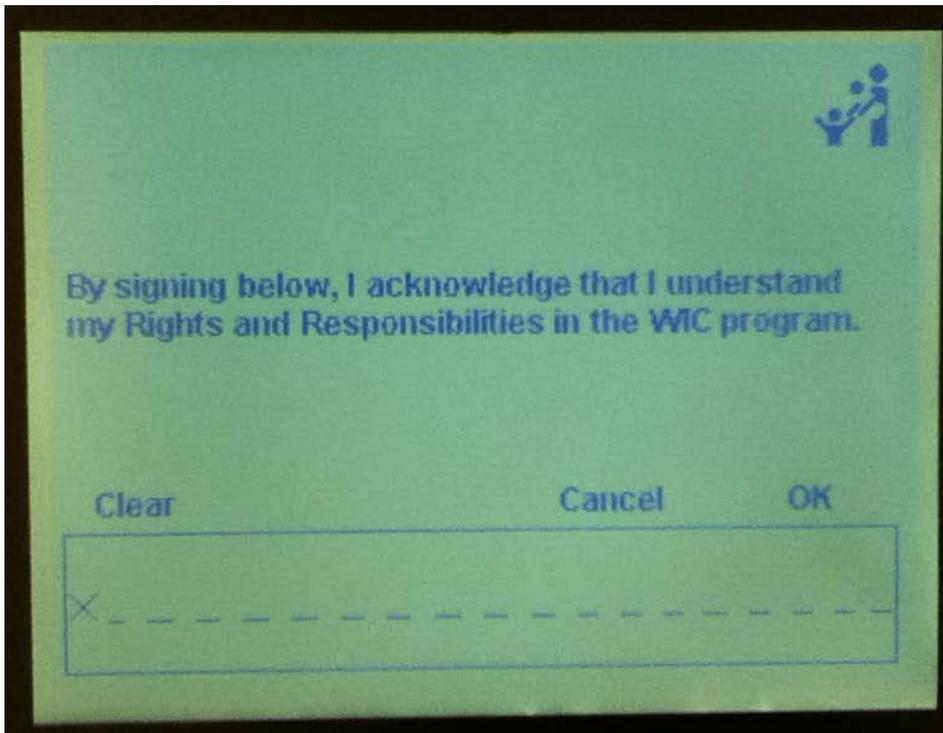
The screenshot shows two overlapping windows from the KWIC software. The top window, titled "Rights and Responsibilities", is a dialog box with a blue header. It contains the text "Rights and Responsibilities" and "Select all the clients you want to record the Rights and Responsibilities for:". Below this, two client names are listed with checked checkboxes: "Noe'mi L Dybevik" and "Raedyn Dybevik". At the bottom right of the dialog are "OK" and "Cancel" buttons.

The bottom window, titled "Rights and Responsibilities Signature", displays a form for the "Your RIGHTS and RESPONSIBILITIES" for the "Kansas Department of Health and Environment WIC Program". The form is divided into two sections: "I AGREE TO:" and "I UNDERSTAND THAT:". The "I AGREE TO:" section includes a bulleted list of commitments such as attending nutrition classes, being on time, providing accurate information, and handling checks carefully. The "I UNDERSTAND THAT:" section includes a bulleted list of program rules and standards. At the bottom of the window, there are buttons for "Manual Signature", "Print Unsigned Copy", "Capture Signature", "Save", and "Cancel".

After clicking Capture Signature, your screen will change to this display. The signature pad will light up and be ready for the client to sign.



The Signature pad lights up and displays the following:



The Signature Pad displays a Signature Box as well as buttons for

- Clear,
- Cancel and
- OK.

Clear – Clears the signature box

Cancel – Cancels signature and returns computer display to the form

OK – Accepts signature and displays it on the form on the computer display

After the caregiver signs the pad and selects OK, your KWIC screen changes to:



Sometimes jostling the signature pad can cause a brief disconnection and the signature disappears from your screen after the client has signed, but before you save. **Always scroll down to view the signature and then click "Save".**

The R & R form must be signed prior to checks being printed. KWIC won't allow checks to be printed without a signed R & R. Once an R&R has been signed (either manually or electronically) it will allow you to print checks.

**Manual Signature**  **Print Unsigned Copy** **Capture Signature**

## Check Stubs

After printing the checks, the client must sign for checks. Open the **Sign for Checks** window from the bottom of Quick Links or under the Check Issuance drop-down menu.

After clicking Sign for Checks, the screen to collect the Caregiver's signature pops up.

If you have a signature pad plugged into your machine, you will be able to choose either Capture Signature or Manual Signature on the screen.

First Use Date	End Use Date	Check Number
11/11/2012	12/11/2012	1007470705
11/11/2012	12/11/2012	1007470706
11/11/2012	12/11/2012	1007470707

**Manual Signature**  **Print Unsigned Copy** **Capture Signature**

Follow the same process as the R & R to collect the electronic signature.

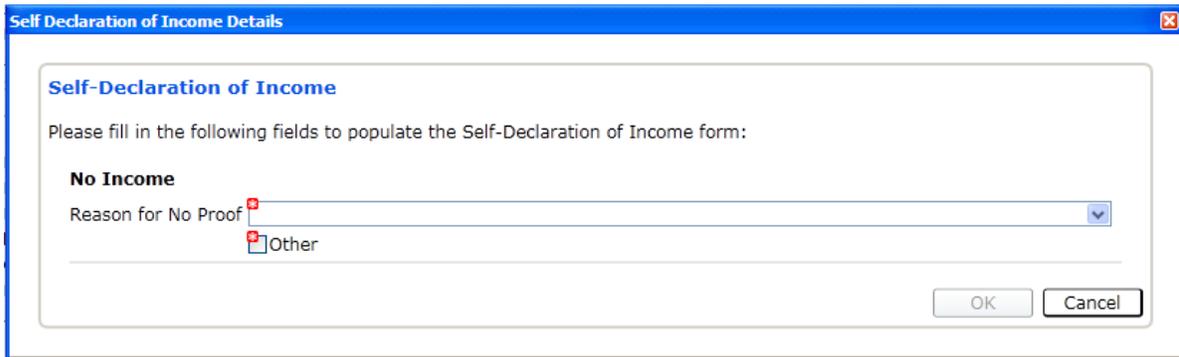
To see a history of signed checks go to Check Issuance > View History > Checks. You can click on the View Signature link to see the actual electronic signature.



If the checks are signed for electronically, you may shred the check stubs. If signed manually, retain the signed stub as instructed by your supervisor.

## Self-Declaration of Income (includes Zero Income)

After checking the Self-Declared or Zero Income box and saving the income screen the following box pops up.



You must either select a Reason for No Proof from the drop down or if there is not an appropriate selection in the drop down, you can select other. If you select Other, a note is mandatory.

After collecting the signature, scroll down to be sure the signature is there and save.

**Self Declaration of Income**

Caregiver Joeni J Verren  
1708 7th Ave  
Hutchinson, KS 67502

Clients 100710147 Joeni J Verren  
100710297 Jane Fry

Income Eligibility Determination Date September 28, 2012  
Number of Family Members 3

Income Source Description family  
Income Amount \$2,000.00  
Income Period Monthly  
Reason for No Proof of Income Started new job - no paystub available  
Other Note

My signature indicates that the above information is true. I understand that if I give false information, I may have to pay the WIC program, in cash, for the WIC food I get.

Caregiver

Manual Signature

Print Unsigned Copy Capture Signature

Save Cancel

To see past signed Self-Declaration of Income forms go to Client > View History > Self-Declaration of Income History.

File Services Client Check Issuance Clinic Admin Utilities Reports Help

Find Client Appointment Book **Joeni J Verren Group**

**Group Members**  
Joeni J Verren  
Jane Fry  
 Hide Inactive Clients  
Add New Group Member

**Quick Links for Joeni J Verren**  
Client Homepage  
Notes  
Dual Participation  
Anthro Meas  
Blood Meas

**Joeni J Verren**  
100710147 Gender Female  
DOB 06/23/1986, 26 Years

**WIC Active BF**  
Cert. Period 09/28/2012 to 09/30/2013  
Priority 1  
Delivery Date 09/28/2012

Self Declaration of Income History Issue Breastpump Notices  
Joeni J Joeni J Joeni J

**Self-Declaration of Income**

Date	Staff Person	Location	Signature Type	
09/28/2012 12:18 PM	Sandi Fry	Reno County WIC Clinic	Electronic	<a href="#">View Signature</a>
09/28/2012 12:15 PM	Sandi Fry	Reno County WIC Clinic	Electronic	<a href="#">View Signature</a>

## Breastpump Users Agreement

After staff has issued a breastpump to a client, when save is clicked the following screen pops up.

The screenshot shows a web application interface. At the top, there is a table titled "Issue Breastpump" with the following data:

Date Issued	Breastpump Type	Serial Number	Date Returned	Signature Type
09/28/2012 12:23 PM	Multi-User Electric	999486		

Below the table, a "Breastpump User Agreement" dialog box is open. The dialog contains the following text and fields:

**Breastpump User Agreement**

Please fill in the following fields to populate the Breastpump User Agreement:

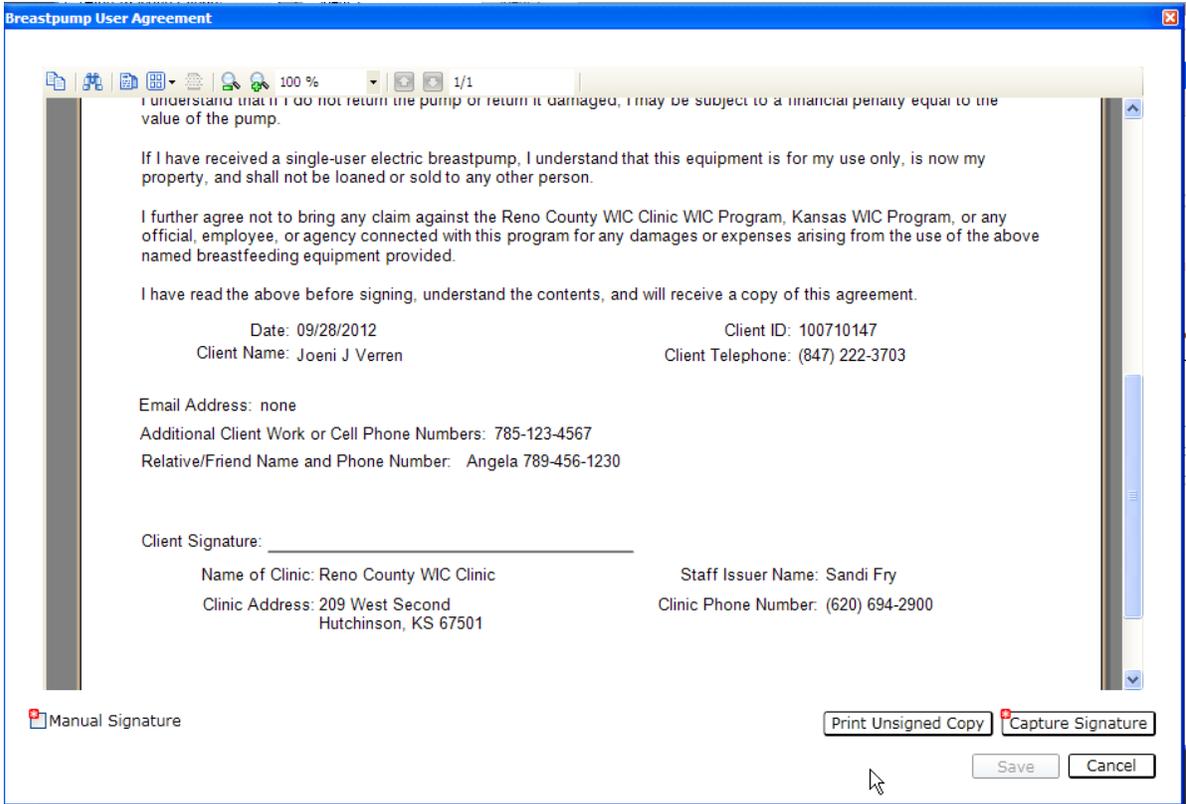
Additional client work or cell phone numbers

Email Address

Relative/Friend name and phone number

At the bottom of the dialog are "OK" and "Cancel" buttons. To the right of the dialog, there are labels for "Select Breas", "Ret", "Inspection Required", and "Date Re".

After filling in the pop up screen, OK is enabled and the completed agreement pops up and you can scroll to see the information you typed in. All fields are required so if the Client does not have an email address, write none.



After collecting the signature, scroll down to be sure the signature was captured and save .

If you want to see the signed Breastpump User Agreement form, go to Client > Issue Breastpump and you can view the signed agreement from that screen.



## Appendix A – Client Status List

A client in the KWIC database always has one and only one client status at any particular time. Over time a client’s status will change based on the completion of certain business events. The Client Status affects the ability to print checks and to be able to open and complete certain WIC service functions.

<b>Client Statuses</b>			
<b>Status</b>	<b>Definition</b>	<b>KWIC assigns this Status when:</b>	<b>Eligible to Receive Checks</b>
Active	A client has been determined to be income and risk eligible and has a current certification period.	WIC Certification Guide completed and the client is income and risk eligible.	Yes, checks can be issued
Expired	KWIC automatically changes a client's status to Expired when their period of eligibility has ended and they have not been recertified. An Expired status lasts for one month. It begins the day after the client's eligibility end date (which is always the last day of the month) and ends on the last day of that month.	The client's period of eligibility has ended within the last month, the client is still categorically eligible, and they have not been recertified.	No, checks cannot be issued
Presumed	A Presumed Eligible client is a pregnant woman who has been processed as presumptive eligible and given a 60 day eligibility period.	Completing the Presumptive Eligibility Guide.	Yes, checks can be issued
Ineligible	A client who was determined not to be income or risk eligible.  Or, a client who was terminated with an ineligibility reason selected as the termination reason. (e.g. No Nutritional Risk Found or Over Income Guidelines)  Or, a child past 5 years old.	Found ineligible during the Income Eligibility test at certification or when redetermined.  No nutritional risks found or assigned during the certification.  Automatically the first of the month after he/she turns 5.	No, checks cannot be issued
Waiting	A client who has been placed on the Waiting List.	The client's record is saved on the Waiting List.	No, checks cannot be issued

<b>Client Statuses</b>			
<b>Status</b>	<b>Definition</b>	<b>KWIC assigns this Status when:</b>	<b>Eligible to Receive Checks</b>
Applicant	A new client applying for WIC or a client reapplying for WIC after a break in service.	Applying for WIC the first time  Reapplying for WIC after a break in service.	No, checks cannot be issued
Terminated	A client who was once Active in WIC and now has been terminated from the Program by the clinic staff for cause.  A client who was once Active and has not been recertified.	A client becomes terminated:  <ul style="list-style-type: none"> <li>• Manually by using the Terminate WIC Client window</li> <li>• When a Transfer Card is printed and the Terminate Client checkbox is selected.</li> <li>• Automatically the day after their eligibility end date if they are women who are categorically ineligible</li> <li>• Automatically the day after their Expired status ends if a child under 5.</li> </ul>	No, checks cannot be issued
Suspended	A client who is currently Active in WIC and now has been suspended for a period of time for program abuse.	A client becomes suspended:  <ul style="list-style-type: none"> <li>• Manually by using the Suspend WIC Client window</li> </ul>	No, checks cannot be issued during the period of suspension

## Appendix B – Pending Categories

This is a chart of the new pending categories in KWIC and when those categories are assigned, including when checks may still be issued.

NOTE: You will learn more about the Record New Pregnancy, Record End of Pregnancy, and Change Delivered windows in a later training module.

<b>KWIC Client Pending Categories</b>			
<b>Pending Category</b>	<b>Definition</b>	<b>KWIC assigns this Pending Category when:</b>	<b>Eligible to Receive Checks</b>
Pending PG	<p>A client who was on WIC that has become pregnant.</p> <p>The client's status will remain Pending PG until the WIC Certification Guide is completed and the client is determined eligible as PG.</p>	Information about the new pregnancy is entered using Record New Pregnancy.	Checks can be issued depending on previous status. (if also Active, they may get checks for a previous certification)
Pending BF	<p>A client who is currently on WIC and has delivered and is BF.</p> <p>The client's status will remain Pending BF until the WIC Certification Guide is completed and the client is determined eligible as BF.</p>	Information is entered using the Record End of Pregnancy window.	Checks can be issued depending on previous status (if also Active, they may get checks for a previous certification)
Pending PP	<p>A client who was on WIC and has delivered and is not BF.</p> <p>The client's status will remain Pending PP until the WIC Certification Guide is completed and the client is determined eligible as PP.</p>	Information is entered using the Record End of Pregnancy window.	Checks can be issued depending on previous status (if also Active, they may get checks for a previous certification)

<b>KWIC Client Pending Categories</b>			
<b>Pending Category</b>	<b>Definition</b>	<b>KWIC assigns this Pending Category when:</b>	<b>Eligible to Receive Checks</b>
TermPending	A client who is termed with checks that are still useable.	Client termed by WIC staff and client still has checks with future Last Date of Use.	No (can use existing checks)
SuspPending	A client who is suspended with checks that are still useable.	Client suspended by WIC staff and client still has checks with a future Last Date of Use	No (can use existing checks)