KWIC Administrator

This module applies to the following security roles:
KWIC Administrator

Kansas Department of Health and Environment
Bureau of Family Health
Nutrition and WIC Services
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This module requires use of the computer and the on-line KWIC Training Application.

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Objectives

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

1. Delineate the role of the KWIC Administrator.
2. Update clinic information using Preferences.
3. Assign new staff to his/her clinic.
4. Update staff records.
5. Create and modify staff schedules.
6. View, update, and delete items in the drop-down lists.

Introduction to KWIC Administrator

Only staff with KWIC Administrator security clearance approved by the State Agency and provided by the KWIC Help Desk staff may access some parts of the KWIC application. (See ADM 07.02.01 KWIC Access and Roles.)

Deciding who will be a KWIC Administrator in your clinic is an important decision.

- Every clinic (physical location) should designate two staff persons as a KWIC Administrator - one who will typically perform KWIC Administrator duties and one as her/his backup. Some clinics may decide to have more than two, but it is important that two people be very familiar with the functions.

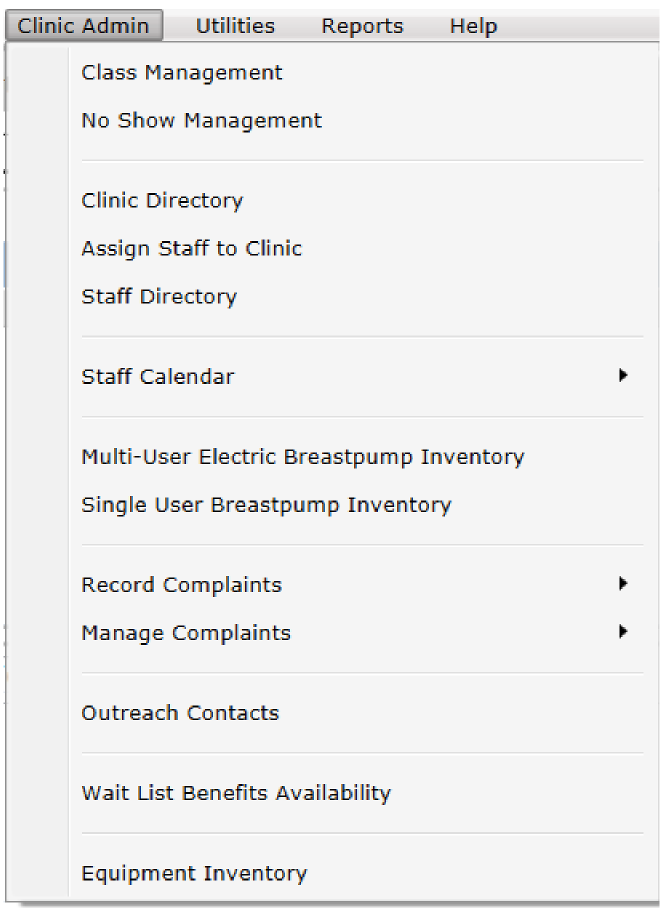
- There are some parts of the application that are not used as frequently as others and the decision to use these functions should not be taken lightly.

- Some functions of the system have a major impact on data and the person who initiates certain functions should be aware of the consequences.

- Because of the sensitivity of the information, only authorized staff have access some areas of the system. The KWIC administrator function allows clinics to decide who should be allowed to view these sensitive areas (for example: the Staff Directory and staff passwords).

- Clinic staff may make requests for changes, additions or updates in many areas, which can only be made by the KWIC Administrator. (For example local staff may wish to add the local food bank name to the Referrals To list.) They should request that the KWIC Administrator add this in the Referrals To window, under Utilities. There are a few utilities that are available to staff with certain other levels of security clearance. Those are noted in the appropriate section.

- A KWIC Administrator has access to these sensitive windows in the KWIC application:
  - Clinic Directory
  - Staff Directory
  - Staff Calendar
  - Move Appointments to New Staff



Here are the items in the KWIC Clinic Admin drop-down menu. Most will be addressed in this module. A few are described in other training modules.

Clinic Directory

The Clinic Directory Window displays a list of Clinic Offices in the State. It contains demographic and caseload information about locations that serve clients. Please use the Clinic Directory Window to:

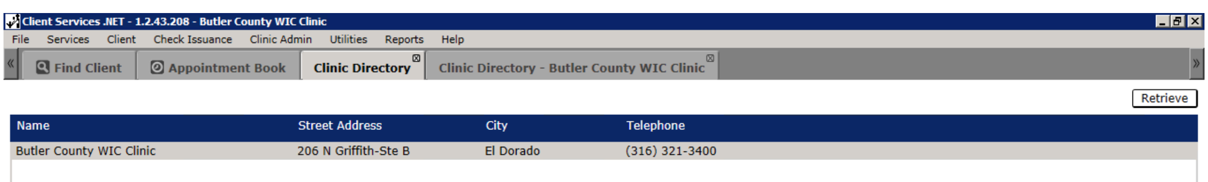
- Maintain Clinic Office information, such as updating the Clinic's office address, and telephone number.
- View information about clinics and staff members in each Local Agency.

It is important to update the Clinic Office information in KWIC if you change anything about the clinic – address, phone, hours, etc. This data "feeds" other functions of KWIC, e.g. client letters and the Clinic Directory reports in KWIC that staff in other clinics will use when they make referrals to your clinic.

You CANNOT add or delete clinics or staff members. These records are entered by KWIC Operations (Help Desk staff).

Clinic Directory Window – Find Tab

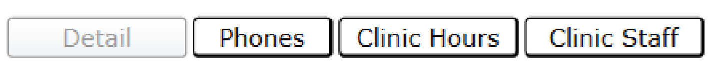
The Find tab is used to find and retrieve clinic records.



To Find And Retrieve Clinics:

1. Go to Clinic on the menu bar.
2. Select Clinic Directory.
3. Highlight a clinic and click the **[Retrieve]** button.

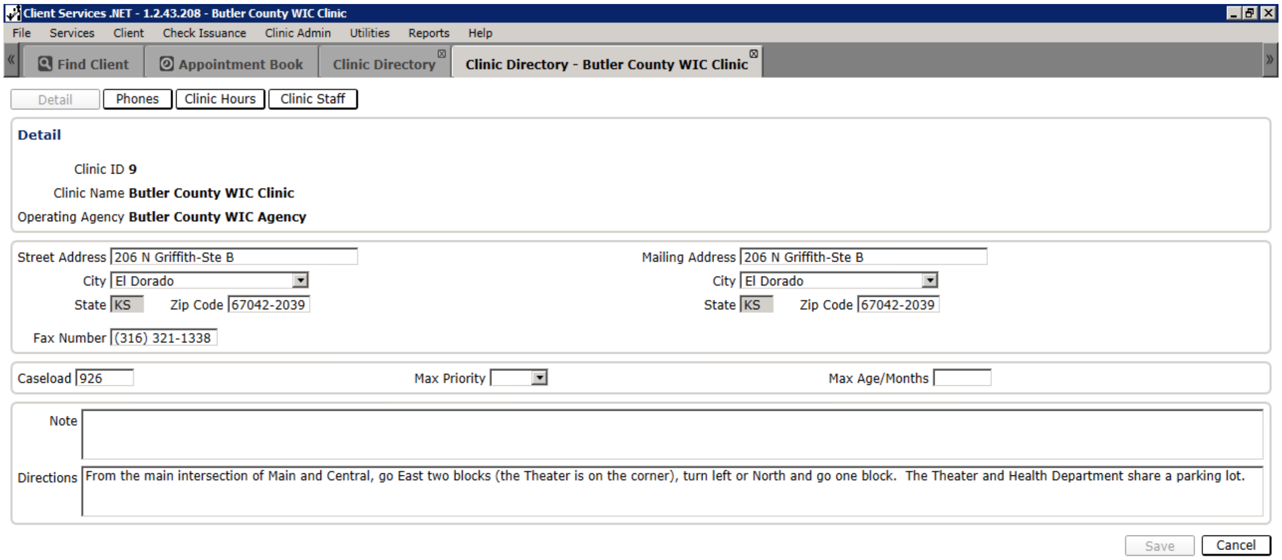
After you retrieve a clinic, there four buttons.



As elsewhere in KWIC, the button for the window you are currently viewing is "greyed out". If you click on another button, the screen view will move.

Clinic Directory Window - Detail Tab

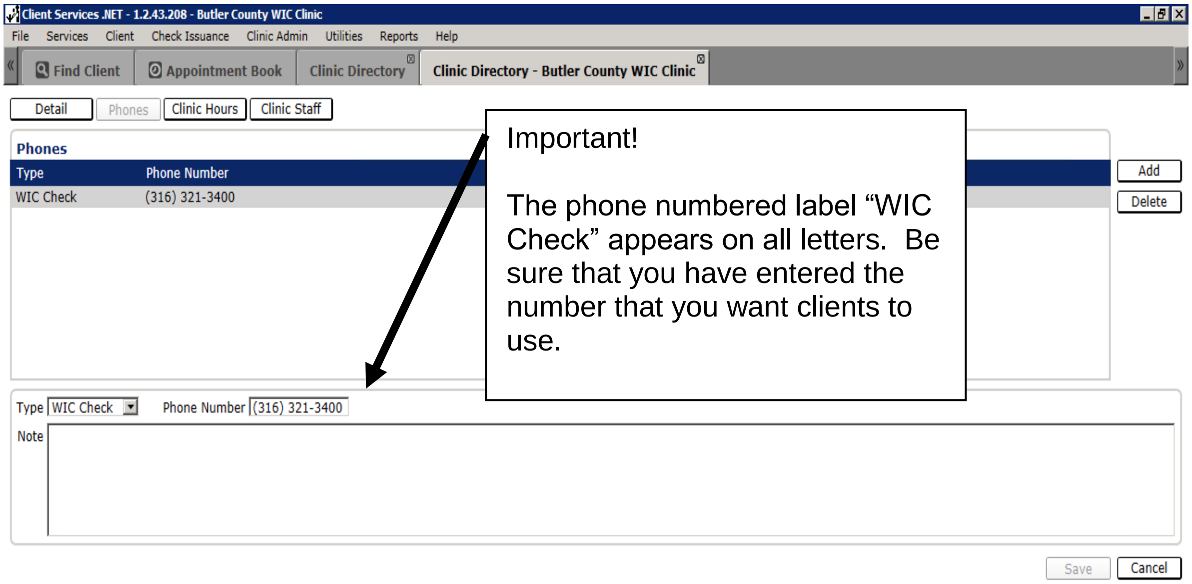
The Detail Tab displays addresses, caseload, and priority information for the selected Clinic.



- You can change any information except the **Clinic ID, Operating Agency,** and the **State** fields by clicking in the field and typing or selecting from a drop-down list.
- The two city fields and the **Max Priority** field only allow you to select from a list. You cannot add anything new.
- **Zip Code**, **Fax**, **Caseload**, and **Max Age/Months** fields only accept numbers.
- All other fields accept any letters and numbers you type.
- The **Clinic ID** field displays the current ID of the clinic.
- The **Max Priority** drop-down list displays the highest WIC priority that the clinic is currently serving.
- The **Max Age/Months** entry field displays the maximum age within WIC priority that the selected clinic is currently serving. This field is displayed when the Max Priority field is blank or when a priority that serves children is selected (priorities 3 and 5).
- It is helpful if you have basic directions entered.

Clinic Directory Window - Phones Tab

The Phones tab assigns phone numbers to the selected Clinic.



To Add Phone Numbers:

1. Click the **[Add]** button to open blank data entry fields.
2. Select a Type and enter a Phone Number.
3. Click the **[Save]** button.

To Change Phone Numbers:

1. Highlight a row in the list box.
2. Make changes in the data entry fields.

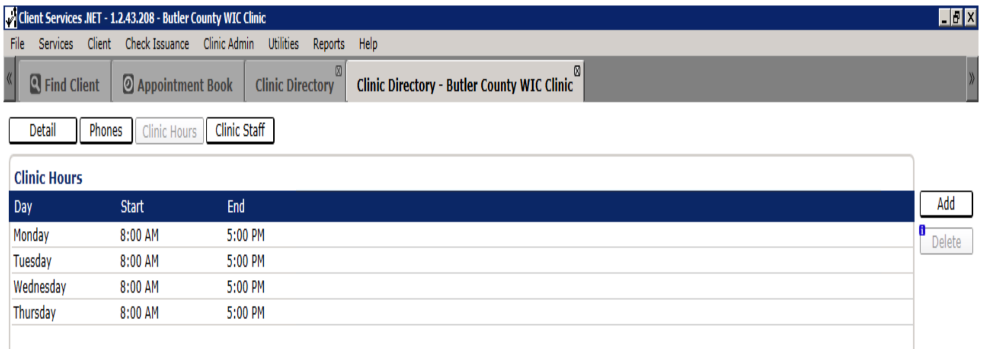
3. Click the **[Save]** button at the lower right of the screen.

To Delete Phone Numbers:

1. Highlight a row in the list box.
2. Click the **[Delete]** button.
3. Click the [Save] button.

Clinic Directory Window - Clinic Hours Tab

The Clinic Hours tab is used to enter and/or view the business hours of the selected clinic. Entering information here does **not** affect your calendar screen. This information "feeds" the Clinic Directory reports in KWIC that staff in other clinics will use when they make referrals to your clinic.

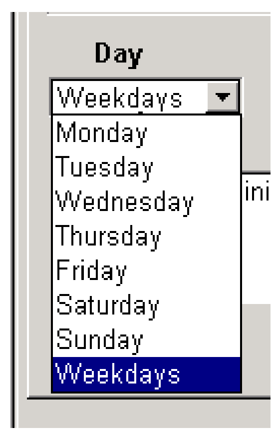


To Add Days:

1. Click the **[Add]** button to open blank data entry fields.
2. Select a Day and enter a Start and End time from the drop down list.
3. Click the **[Save]** button at lower right of the screen. (Not shown in this screen shot.)

To Change Days:

1. Highlight a row in the list box.
2. Make changes in the data entry fields.
3. Click the **[Save]** button.



To Delete Days:

1. Highlight a row in the list box.
2. Click the **[Delete]** button.
3. Click the **[Save]** button

Additional Information

- You cannot add two entries for the same day.
- To make entry easier, if your clinic is open every weekday, there is a dropdown choice of "Weekdays". However you **cannot** add "Weekdays" along with any specific day, e.g. you cannot have a record for Monday and Weekdays.
- Notes can be added for specific days, e.g. "Closed Noon-1:00".

Clinic Directory Window - Clinic Staff Tab

The Clinic Staff tab displays a list of the staff members that work in the selected Clinic. Staff members are assigned to clinics in the Assign Staff to Clinic window under the Clinic Menu. This tab is read-only. You can only view the information listed here.

Assign Staff to Clinic

Please do NOT use this window.
Send any requests for assigning staff to clinics (or deleting staff) to:
KDHE.WicStaffChange@ks.gov

Staff Directory

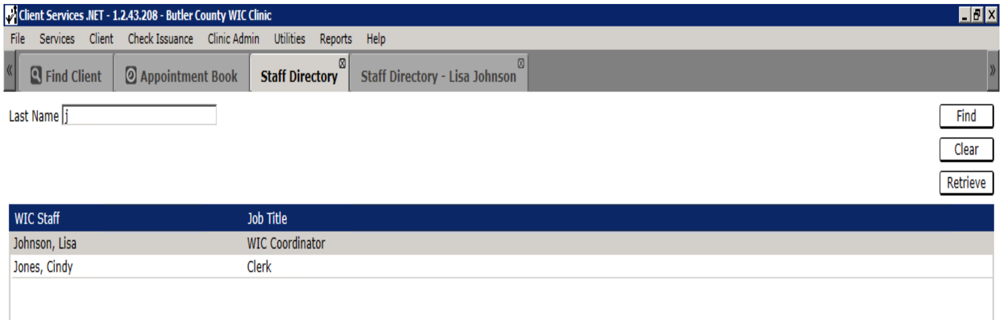
KWIC maintains a list of staff working in the WIC clinic. KWIC Operations staff enters clinic staff names into the KWIC system. When a new WIC staff person is hired, notifyt the state WIC staff using the special "WIC Staff Change email address:
KDHE.WicStaffChange@ks.gov.
(Refer to ADM 11.00.00 Local Agency Staff Training-New Employees.)

After completion of appropriate training, use the WIC Staff Change email again to request KWIC security clearance. The State WIC Office will notify the KWIC Help Desk so that the new staff member can be added to KWIC. The Staff Directory window is then used to enter job specific data (i.e. job title, roles, etc.)

- The Staff Directory is found in the drop-down box under 'Clinic Admin' in the menu bar.
- Four tabs help guide the user in entering staff information.

Find Tab

The Find tab is used to find and retrieve records for staff who are assigned to your clinic. Staff names that appear in RED have been inactivated.



Editing or Locating Information

1. To edit information for a staff person, enter a (partial) last name, i.e., "Jones" or "Jon".

2. Click the **[Find]** button and all staff member records that match your search are listed.

3. Or you can do a "blind search" by entering nothing in the Last Name box and click the **[Find]** button. All staff member names will display.

4. Highlight the staff member you want to view or edit and click the **[Retrieve]** button.

Staff Detail Tab

The Detail Tab provides an area to update information about staff. New staff members are created and assigned to clinics by KWIC Operations staff in the Assign Staff to Clinic window under the Clinic Menu.

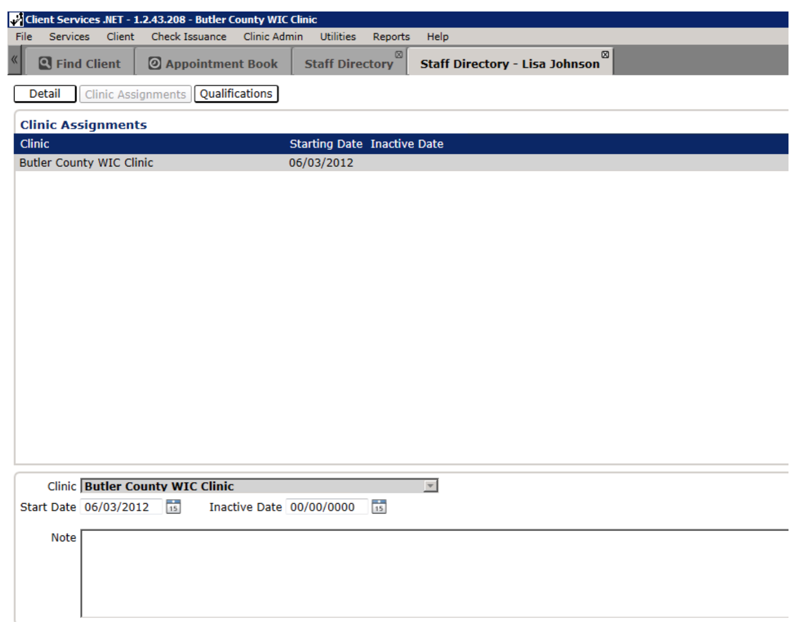
- **First Name, MI and Last Name**
- **Job Title -** Any descriptive title is acceptable.
- **Password** – When a new employee first has access to KWIC, they should work with the Help Desk to use the default password and then immediately change it to a personal password that meets the password rules. If an employee forgets their password, the easiest thing to do is contact the Help Desk for assistance. However, the employee who has forgotten their password can have the KWIC Administrator enter a new password on this screen for Client Services.
- **Work Phone** – Either a clinic phone number or a private number is documented here, based on clinic policy.
- **FAX -** The number for the FAX machine used most often should be listed in this field.
- **E-Mail** – The specific staff email address or KWIC Mail address at the WIC clinic
- **Notes**: Use this section to enter additional information specific to the staff member to be maintained in the system. Confidential information should not be entered here but kept in a confidential information file outside of KWIC.

Remember to save!

Clinic Assignments Tab

The Clinic Assignments tab displays to which clinics a particular staff member is assigned.

Please do NOT use this window to make changes.



Send requests for staff changes to:
KDHE.WicStaffChange@ks.gov

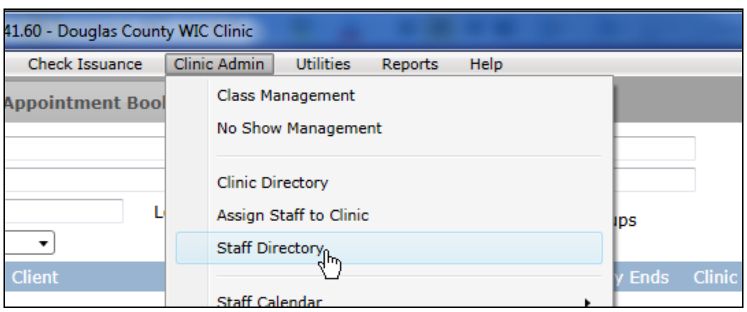
Qualifications Tab

This tab documents the earned credentials and/or WIC designations for the selected staff person uses at the clinic. It also is the critical screen that the State Agency uses to create distribution lists for mass email notification to local staff.

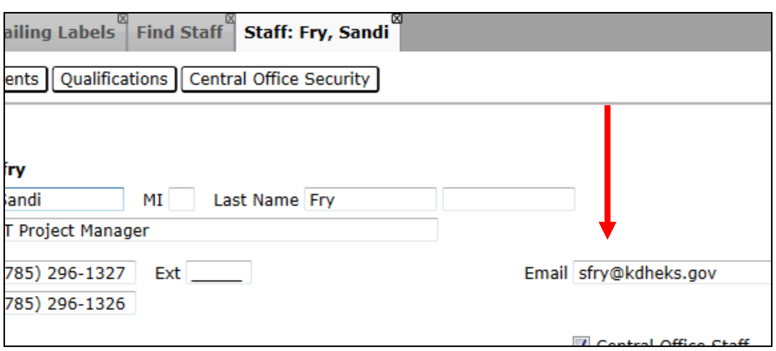
Question: How do I make sure all my staff receives their own emailed copy of the P & I memos?

Be sure to do this for all WIC employees. Refer to policy: ADM 07.03.00 Maintain Clinic Info.

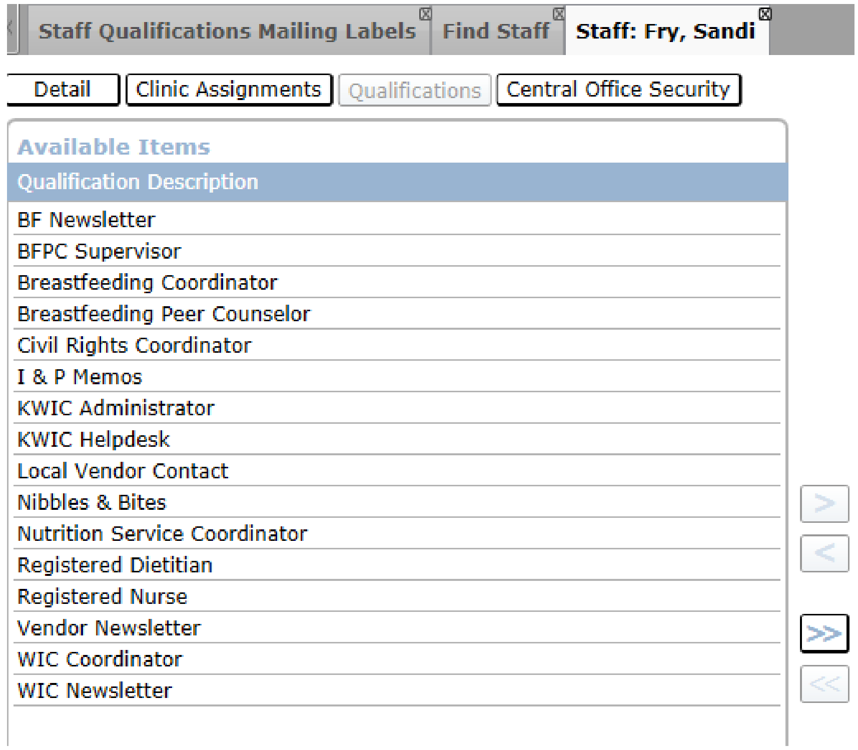
- A staff member with KWIC Administrator security clearance can click on Staff Directory, under Clinic Admin.



- This will open the Staff Directory window and by selecting Find, you will see all the WIC staff assigned to your clinic. By either double clicking the staff person's name or highlighting the name and clicking Retrieve, the record opens. On the left side of the screen, you will see an Email field. The email address entered in that field will receive all the emails signed up for on the Qualifications tab.



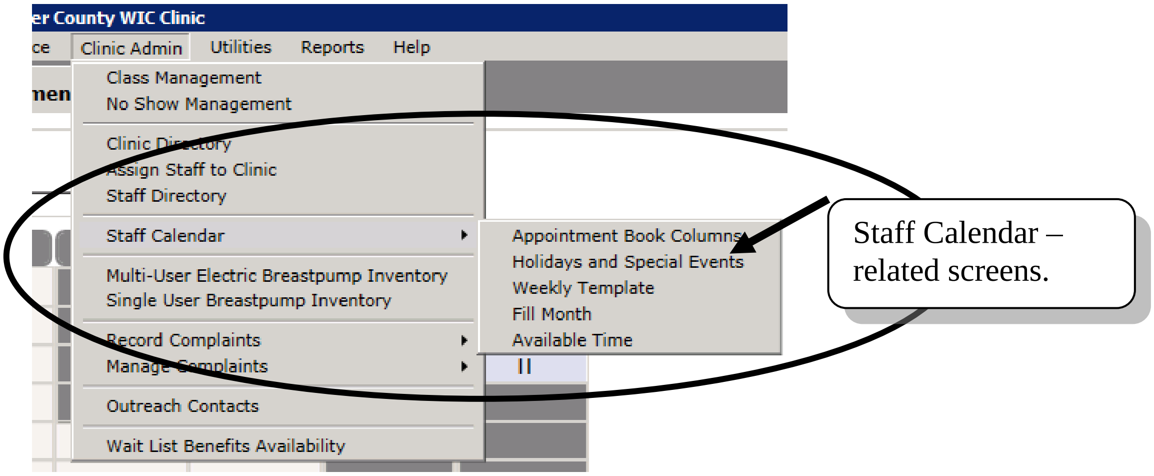
- The Qualifications tab is where you can select what types of emails you want your staff to receive from the State Agency. Let's say your new staff member is a Breastfeeding Peer Counselor. You might want to move over Breastfeeding Peer Counselor, I & P Memo, KWIC Helpdesk and WIC Newsletter. She would receive all emails that were sent to any one of those four groups.



- Please remember to move KWIC Helpdesk over for everyone. As staff members come and go from your clinic please remember to keep email addresses updated and also what qualifications are moved over. **This is the only list the State Agency and the KWIC helpdesk uses to send out mass emails to WIC staff.**

Staff Calendar

These screens are used to enter available appointment times in the appointment book for each staff member and make adjustments in day-to-day staff scheduling. Select Staff Calendar from the Clinic menu.

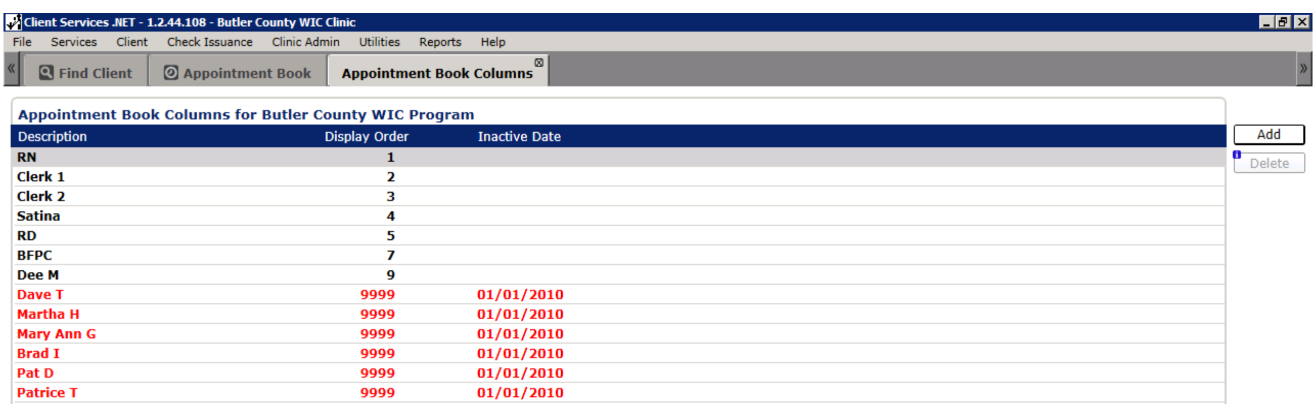


Appointment Book Columns

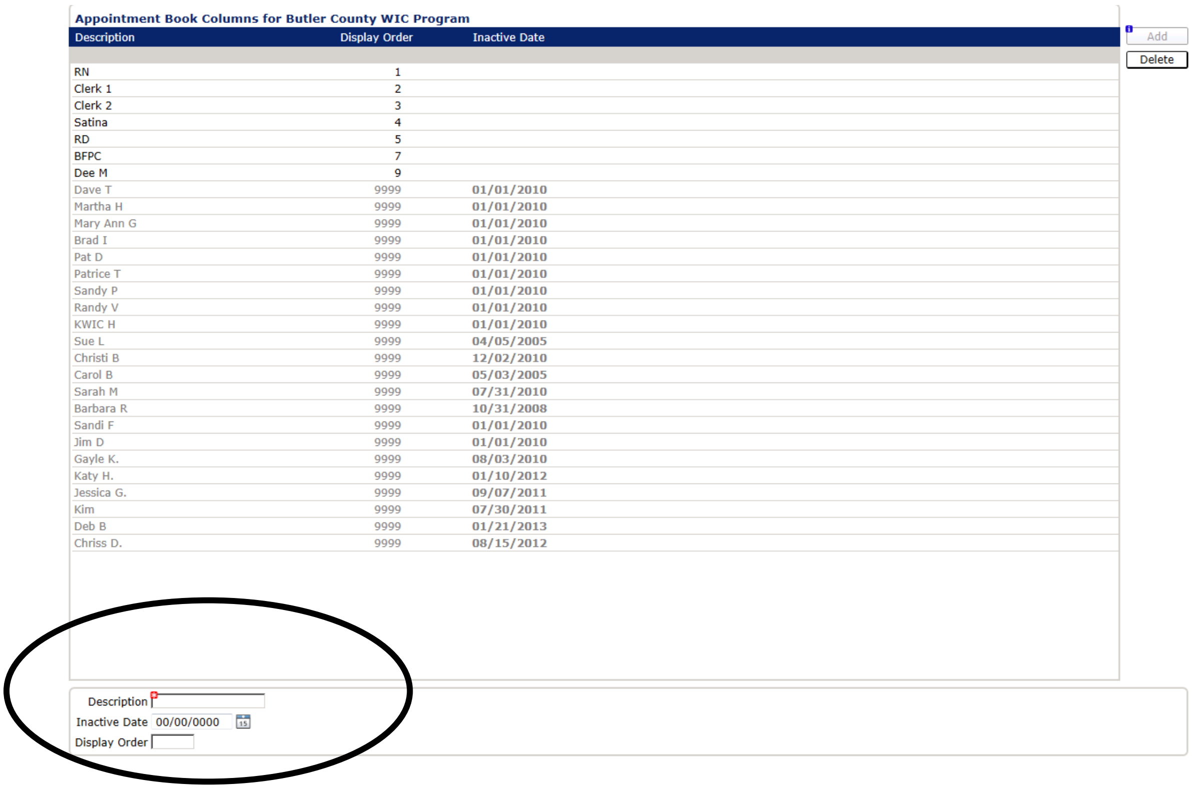
The Appointment Book Columns window is used to add columns to the KWIC Appointment Book calendar. This window works with the Weekly Templates and the Fill Month windows to populate the Appointment Book. This is easy and lets you have the KWIC Appointment Book columns just like you want.

Use this procedure to add a new Appointment Book Column.

1. From the Menu bar, select Clinic Admin – Staff Calendar – Appointment Book Columns.



2. Click **[Add]** and you will see three fields appear below the list of staff names.



Appointment Book Columns for Butler County WIC Program

Description	Display Order	Inactive Date
RN	1	
Clerk 1	2	
Clerk 2	3	
Satina	4	
RD	5	
BFPC	7	
Dee M	9	
Dave T	9999	01/01/2010
Martha H	9999	01/01/2010
Mary Ann G	9999	01/01/2010
Brad I	9999	01/01/2010
Pat D	9999	01/01/2010
Patrice T	9999	01/01/2010
Sandy P	9999	01/01/2010
Randy V	9999	01/01/2010
KWIC H	9999	01/01/2010
Sue L	9999	04/05/2005
Christi B	9999	12/02/2010
Carol B	9999	05/03/2005
Sarah M	9999	07/31/2010
Barbara R	9999	10/31/2008
Sandi F	9999	01/01/2010
Jim D	9999	01/01/2010
Gayle K.	9999	08/03/2010
Katy H.	9999	01/10/2012
Jessica G.	9999	09/07/2011
Kim	9999	07/30/2011
Deb B	9999	01/21/2013
Chriss D.	9999	08/15/2012

3. **Description** – For a new column, enter the name that you want to appear at the top of the new appointment book column. You can use proper names (e.g. Susan) or titles (e.g. Clerk, RN, RD).

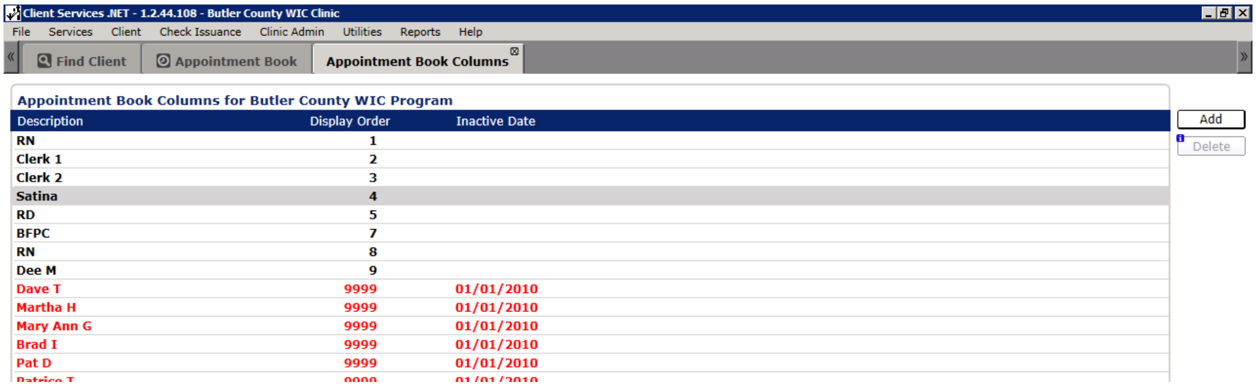
4. **Inactive Date** – Leave blank for new and current columns.

5. **Display Order** – Enter a number to indicate the display order of the columns. The column with the lowest number will show the furthest to the left on the Appointment Book.
   a. If you choose display order numbers that are separated by several numbers, then there will be a number available to pick if you add a new column. (10, 20, 30, 40). But the display number can be edited easily, so don't worry.
   b. If you do not enter display order numbers, columns are shown alphabetically.

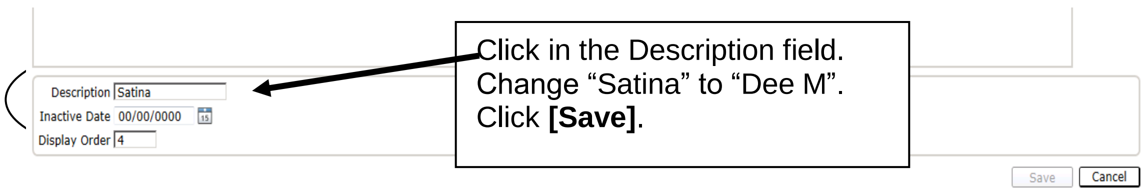
6. Click **[Save].**

Use this procedure to change an Appointment Book Column label.

1. From the Menu bar, select Clinic Admin – Staff Calendar – Appointment Book Columns.

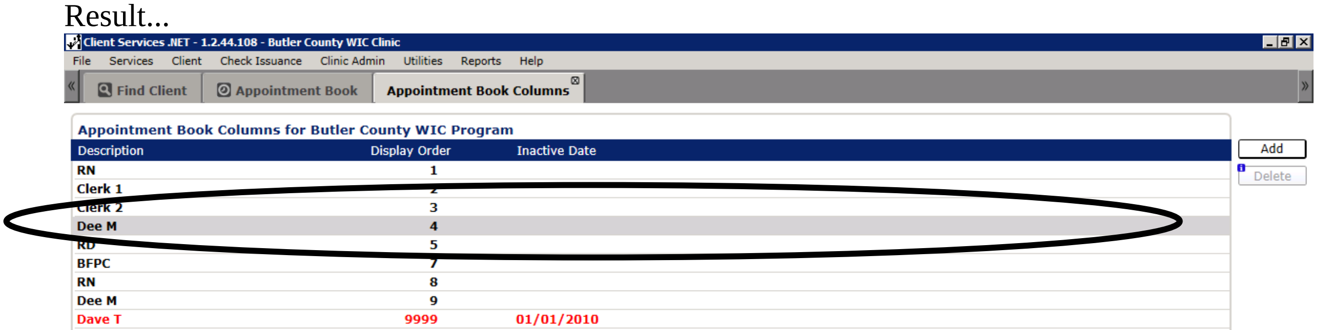


2. Click on the Row that represents the column you want to change.



3. This will open the three information fields – Description, Inactive Date, and Display Order. In this example, Satina will be changing jobs in the Health Department and no longer be working in WIC, but is being replaced by Dee. So all you want to do is change the column label. Click in the Description field. Make your change and save.

Result...



You can also use this procedure to change the display order of the columns if you want to rearrange the columns in the Appointment Book.

Use this procedure to inactivate an Appointment Book Column label.

This is when you want to make a column disappear from the Appointment Book.

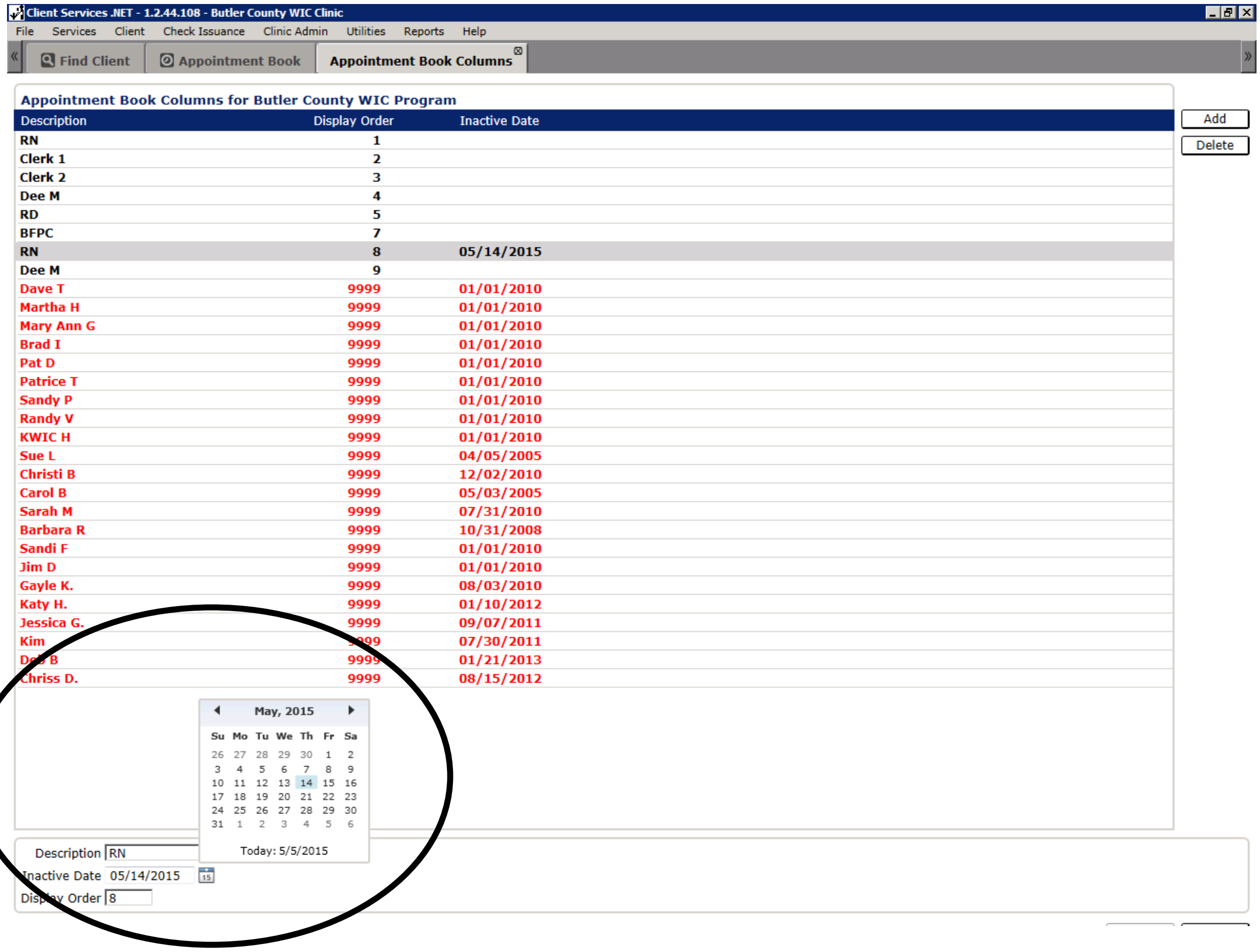
Consider carefully if you need to do this. For a vacancy, some clinics leave the appointments in the column and change the description to something like “Vacant RN” and work the appointments in with other staff.
If you do decide you want a column removed from the Appointment Book, carefully review and change any existing appointments to other columns before inactivating.

1. From the Menu bar, select Clinic Admin – Staff Calendar – **Appointment Book Columns**.

2. Click on the Row that represents the column you want to change.

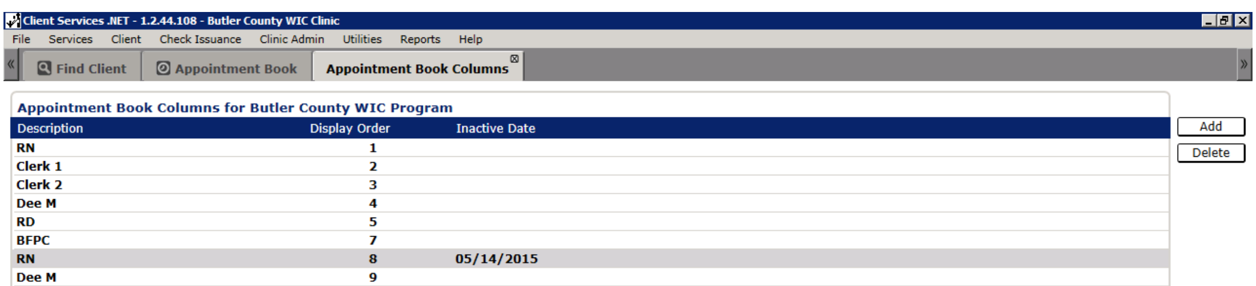
3. This will open the three information fields – Description, Inactive Date, and Display Order. In this example, we want to inactivate “RN” with the display position of 8. Click in the Inactive Date field to get the calendar or type the desired date in mm/dd/yyyy format.

4. Click **[Save]**.



Description	Display Order	Inactive Date
RN	1	
Clerk 1	2	
Clerk 2	3	
Dee M	4	
RD	5	
BFPC	7	
RN	8	05/14/2015
Dee M	9	
Dave T	9999	01/01/2010
Martha H	9999	01/01/2010
Mary Ann G	9999	01/01/2010
Brad I	9999	01/01/2010
Pat D	9999	01/01/2010
Patrice T	9999	01/01/2010
Sandy P	9999	01/01/2010
Randy V	9999	01/01/2010
KWIC H	9999	01/01/2010
Sue L	9999	04/05/2005
Christi B	9999	12/02/2010
Carol B	9999	05/03/2005
Sarah M	9999	07/31/2010
Barbara R	9999	10/31/2008
Sandi F	9999	01/01/2010
Jim D	9999	01/01/2010
Gayle K.	9999	08/03/2010
Katy H.	9999	01/10/2012
Jessica G.	9999	09/07/2011
Kim	9999	07/30/2011
Deb B	9999	01/21/2013
Chriss D.	9999	08/15/2012

After saving, the Inactive Date will display and that particular row will move to the end of the list. Result...



Description	Display Order	Inactive Date
RN	1	
Clerk 1	2	
Clerk 2	3	
Dee M	4	
RD	5	
BFPC	7	
RN	8	05/14/2015
Dee M	9	

In general, it is better to enter an inactive date instead of just using the Delete button to delete a row. If you use delete, there is no record that it was ever there.

Holidays and Special Events

The Holidays and Special Events window is used to add holidays or clinic-wide events, such as staff meetings, to the appointment calendar. By blocking out these days or hours, there is no risk that staff will forget and make appointments during those times.

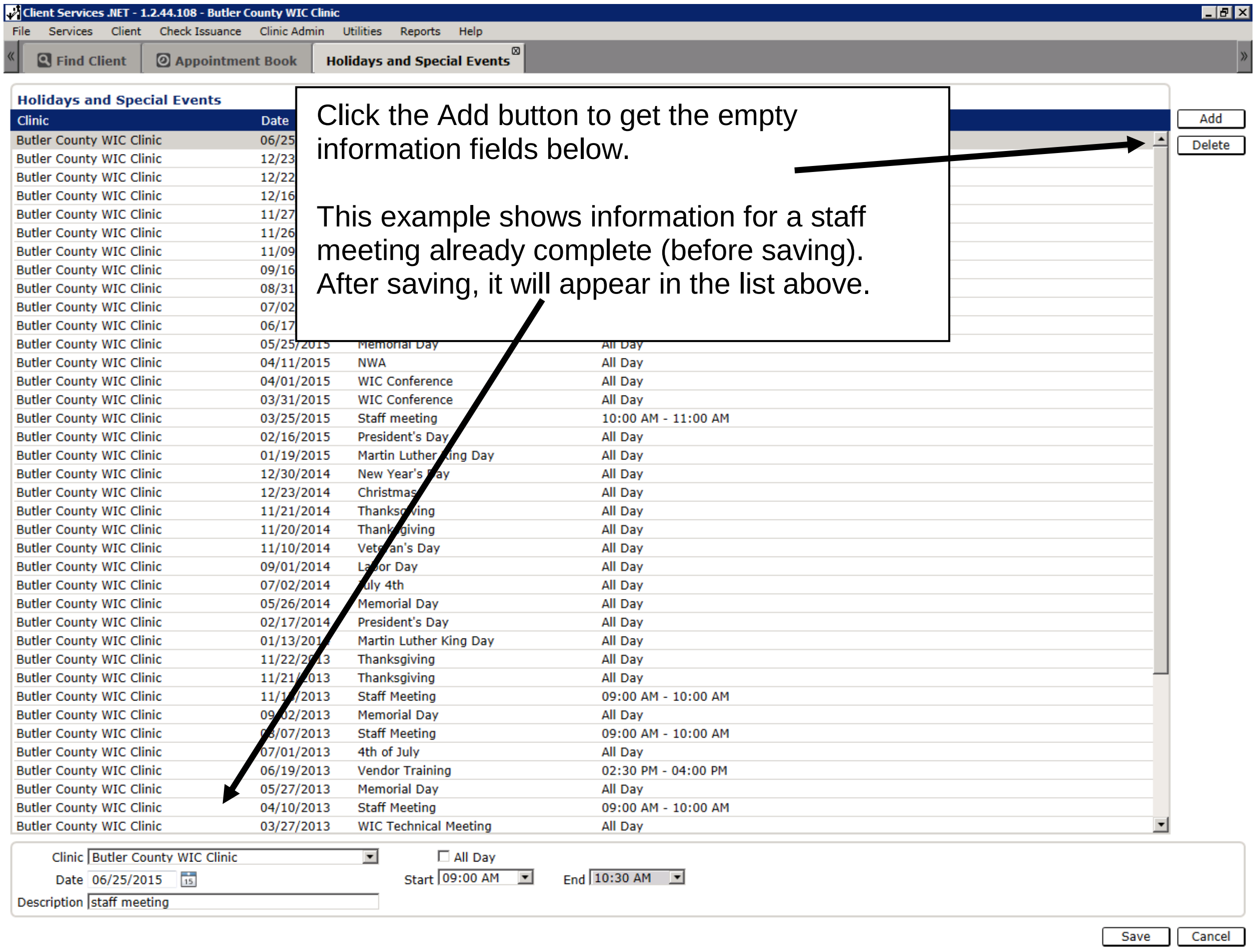
This window works with the Weekly Templates and the Fill Month windows to populate the Appointment Book.

1. From the Menu bar, select Clinic Admin – Staff Calendar – **Holidays and Special Events.**

2. Click **[Add]**.

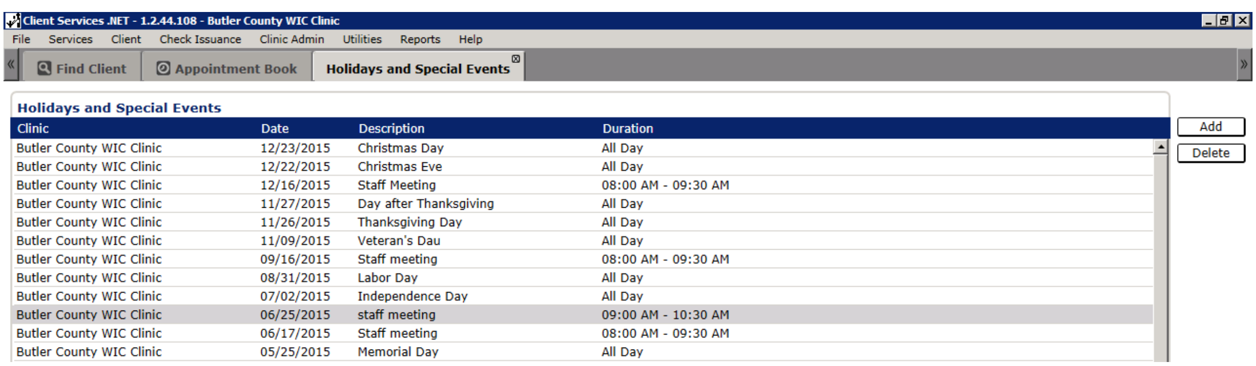
3. Enter information about the holiday or special event as follows.
    a. **Clinic** – Select the name of the clinic from the drop-down list.
    b. **Date** – Enter the dated of the holiday or special event.
    c. **All Day Checkbox** – Click to make a check if the clinic will be closed all day. If All Day is checked, do NOT enter start and end times.
    d. **Start** – Enter the start time. (Use only if not an All Day event.)
    e. **End** – Enter the end time. (Use only if not an All Day event.)

4. Click **[Save]**. Appointment Book times slots are blocked for the times entered on the specified date.



Clinic	Date	Description	Duration
Butler County WIC Clinic	06/25		
Butler County WIC Clinic	12/23		
Butler County WIC Clinic	12/22		
Butler County WIC Clinic	12/16		
Butler County WIC Clinic	11/27		
Butler County WIC Clinic	11/26		
Butler County WIC Clinic	11/09		
Butler County WIC Clinic	09/16		
Butler County WIC Clinic	08/31		
Butler County WIC Clinic	07/02		
Butler County WIC Clinic	06/17		
Butler County WIC Clinic	05/25/2015	Memorial Day	All Day
Butler County WIC Clinic	04/11/2015	NWA	All Day
Butler County WIC Clinic	04/01/2015	WIC Conference	All Day
Butler County WIC Clinic	03/31/2015	WIC Conference	All Day
Butler County WIC Clinic	03/25/2015	Staff meeting	10:00 AM - 11:00 AM
Butler County WIC Clinic	02/16/2015	President's Day	All Day
Butler County WIC Clinic	01/19/2015	Martin Luther King Day	All Day
Butler County WIC Clinic	12/30/2014	New Year's Day	All Day
Butler County WIC Clinic	12/23/2014	Christmas	All Day
Butler County WIC Clinic	11/21/2014	Thanksgiving	All Day
Butler County WIC Clinic	11/20/2014	Thanksgiving	All Day
Butler County WIC Clinic	11/10/2014	Veteran's Day	All Day
Butler County WIC Clinic	09/01/2014	Labor Day	All Day
Butler County WIC Clinic	07/02/2014	July 4th	All Day
Butler County WIC Clinic	05/26/2014	Memorial Day	All Day
Butler County WIC Clinic	02/17/2014	President's Day	All Day
Butler County WIC Clinic	01/13/2014	Martin Luther King Day	All Day
Butler County WIC Clinic	11/22/2013	Thanksgiving	All Day
Butler County WIC Clinic	11/21/2013	Thanksgiving	All Day
Butler County WIC Clinic	11/1[illegible]/2013	Staff Meeting	09:00 AM - 10:00 AM
Butler County WIC Clinic	09/02/2013	Memorial Day	All Day
Butler County WIC Clinic	0[illegible]/07/2013	Staff Meeting	09:00 AM - 10:00 AM
Butler County WIC Clinic	07/01/2013	4th of July	All Day
Butler County WIC Clinic	06/19/2013	Vendor Training	02:30 PM - 04:00 PM
Butler County WIC Clinic	05/27/2013	Memorial Day	All Day
Butler County WIC Clinic	04/10/2013	Staff Meeting	09:00 AM - 10:00 AM
Butler County WIC Clinic	03/27/2013	WIC Technical Meeting	All Day

Result after saving...



Clinic	Date	Description	Duration
Butler County WIC Clinic	12/23/2015	Christmas Day	All Day
Butler County WIC Clinic	12/22/2015	Christmas Eve	All Day
Butler County WIC Clinic	12/16/2015	Staff Meeting	08:00 AM - 09:30 AM
Butler County WIC Clinic	11/27/2015	Day after Thanksgiving	All Day
Butler County WIC Clinic	11/26/2015	Thanksgiving Day	All Day
Butler County WIC Clinic	11/09/2015	Veteran's Dau	All Day
Butler County WIC Clinic	09/16/2015	Staff meeting	08:00 AM - 09:30 AM
Butler County WIC Clinic	08/31/2015	Labor Day	All Day
Butler County WIC Clinic	07/02/2015	Independence Day	All Day
Butler County WIC Clinic	06/25/2015	staff meeting	09:00 AM - 10:30 AM
Butler County WIC Clinic	06/17/2015	Staff meeting	08:00 AM - 09:30 AM
Butler County WIC Clinic	05/25/2015	Memorial Day	All Day

Additional Rules for Holidays and Special Events:

- If a holiday or special event needs to be added after the schedule has been created for a given month, the administrator will need to use the Available Time window to go back make the adjustments.

- Holidays and special events can be changed before the date of the holiday or special event. After the event date, they are read-only.

Weekly Template

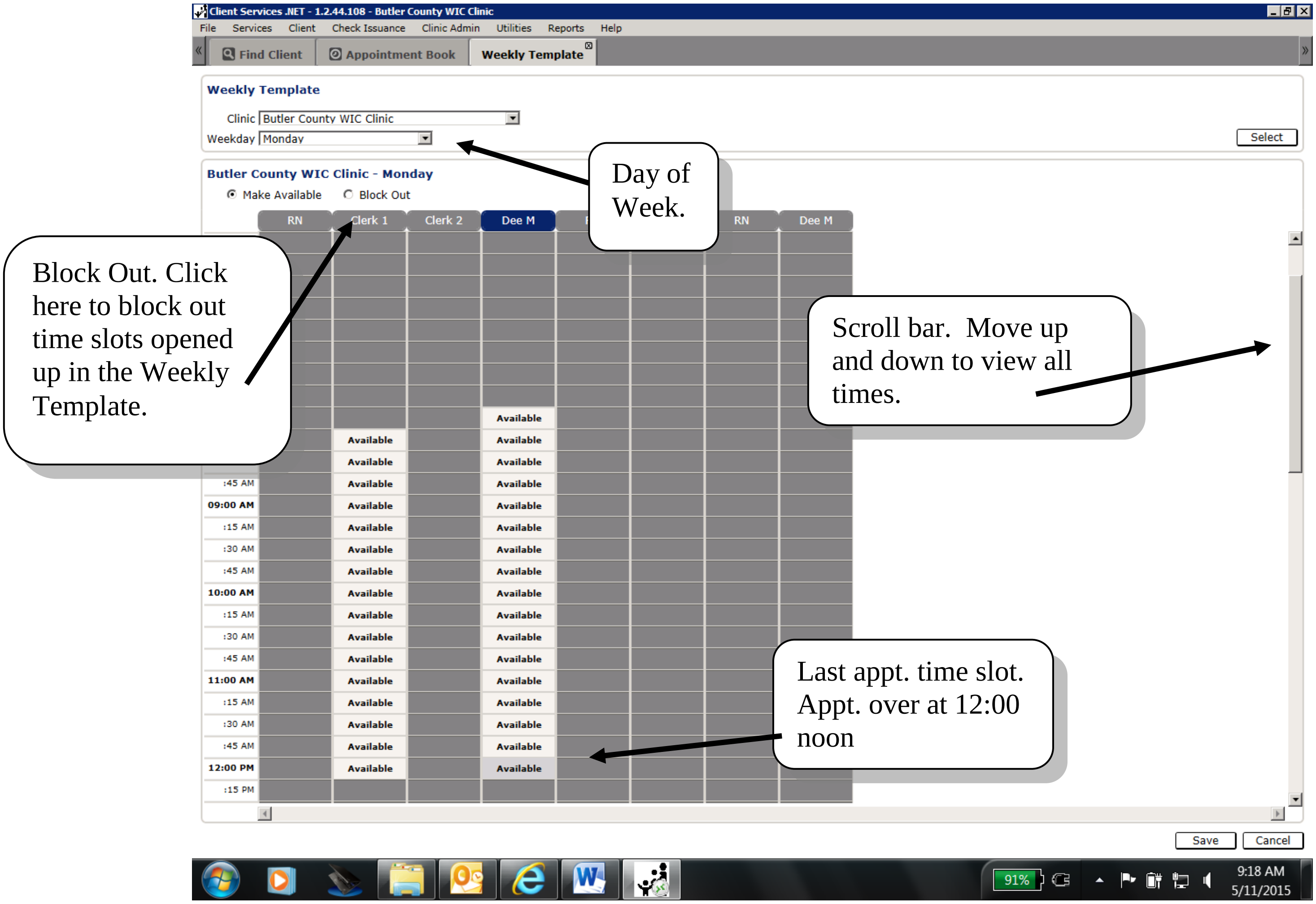
Now that you have the Appointment Book Columns identified and any holidays / special events blocked out using the windows previously described, it is time to set up the Weekly Template.

This window is used to set up the standard weekly schedule for each appointment book role for each day of the week. It provides an overview of the normal schedule for each role on each day of the week before adjusting for annual leave, meetings, doctor's appointments, and special circumstances.

- If the schedule for staff varies, enter the most likely scenario, e.g. Sandy works the first three Mondays of every month but not the fourth. Enter Sandy's Monday hours and adjust for the fourth on the **Available Time** window.
- The template for each staff only needs to be entered into KWIC once but may be modified as needed. This template is applied to unscheduled months on the **Fill Month** window.
- Many agencies will have a consultant dietitian who only works a day every month or two. In this instance, do **not** enter them into the Weekly Template. Instead, you will adjust the schedule for that person in the **Available Time** window.

If yours is a clinic that only does WIC on a specific day of the week, the WIC Coordinator can choose to only set a template for that day of the week. But if all the other days are blocked out on the KWIC Appointment Book, what happens if you want to make an exception and see a client on a day that is not normally your "WIC day"? No one will be able to enter an appointment.

To solve this problem, it is recommended that such a clinic "open up" the KWIC Appointment Book on other days. Then staff should be trained to only schedule on the normal "WIC day". They can enter appointments on other days using guidelines are set up by the WIC Coordinator.



To Designate Staff Role:

1. From the Menu bar, select Clinic Admin – Staff Calendar – **Weekly Template**.

2. Select a clinic from the **Clinic** drop-down list.

3. Select the day from the **Weekday** drop-down list.

4. Click the **[Make Available]** button. When you click the **[Make Available]** button, the day of the week will display after the name of the clinic (above the appointment grid). **Be sure to complete a template for each day of the week for which you want to have WIC appointments available.**

5. Use the mouse to click the box that designates the time that the staff person begins providing WIC services.

6. Using the mouse, move the arrow to the box listing the last 15 minute appointment that the staff person will see clients. Click the **RIGHT** button on the mouse and the times chosen will fill in with the role designated. You can also click each time cell individually, but it is MUCH easier to left click in the first time cell and right click in the last time cell.

7. Click **[Save].**

8. **Repeat** this process for every column needed on the first day.

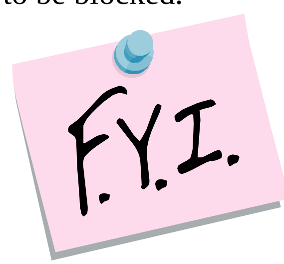
9. **Then repeat the whole process for the next day of the week, and the next day, etc** until you have set up a template for each day of the week you want open in the Appointment Book.

To Block Out Time:

If you have opened hours using the process just described, you can go back and block out hours. For instance the Weekly Template is all set up and your clinic hours change to close earlier on Friday. Or Martha is only going to work Monday afternoon instead of all day and you want to block out the template for her on Monday morning.

1. Click the **Block Out** indicator, then click in the time cells needing to be blocked.

2. If you are blocking out a lot of time cells, it is easier to left click in the first cell, go to the last time cell that needs to be blocked and right click. All the time cells in between will become blocked.

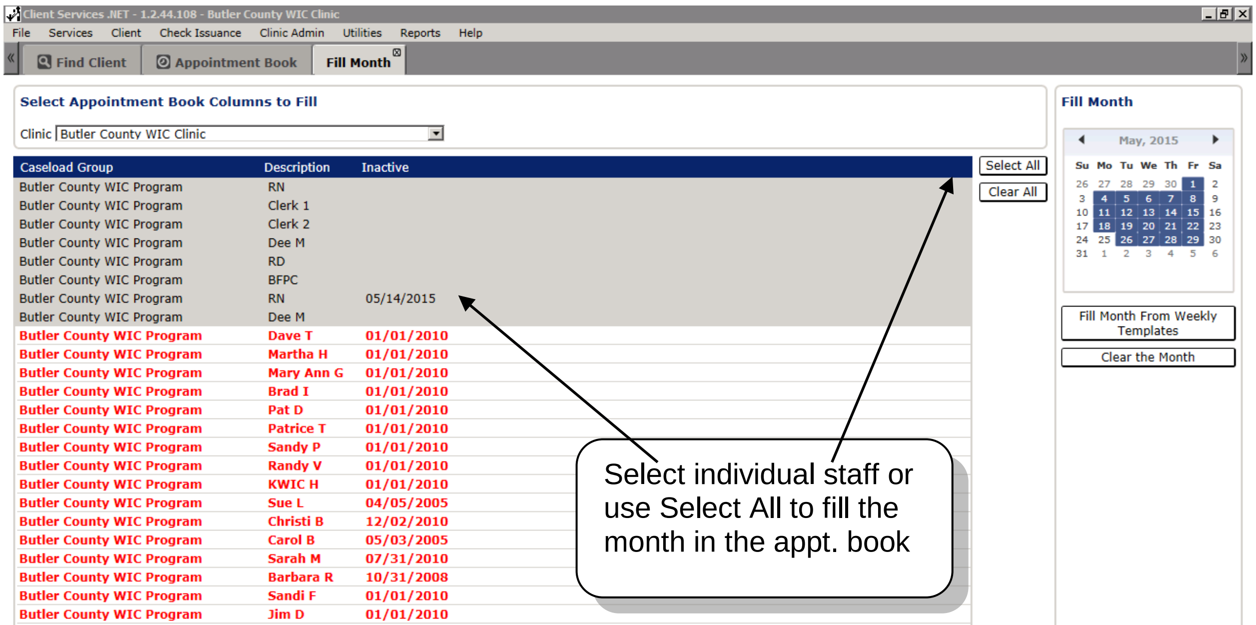


3. Click **[Save]**.

Fill Month

The Fill Month window is used to fill each weekday in a month with the hours entered in the Staff Calendar – Weekly Template window.

This window works in conjunction with the other Staff Calendar windows we have just learned about to populate the KWIC Appointment Book.



To Fill In The Month:

1. From the Menu bar, select Clinic Admin – Staff Calendar – **Fill Month**.

2. Select a **Clinic**.

3. Select a **Year** and **Month** using the right/left arrows above the calendar to move the calendar to the desired month.

4. Highlight (click on) the rows representing appointment book columns you want to fill the calendar for, or click **[Select All]** to select all the available columns. You can click the **[Clear]** button to clear all the selected columns and begin again.

5. Click the **[Fill Month From Weekly Templates]** button to fill the month with the completed weekly template for the selected columns.

a. On the little calendar, you will see that the application will "color in" each working day that the selected columns are scheduled for, based on the weekly template set up on the Staff Calendar – Weekly Template window.

b. If the appointment book column is inactivated at your clinic, the inactive dates appear next to the column description in the list of available staff.

c. If an inactivated column is selected, when you click **[Fill Month From Weekly Template]**, a message appears for each inactive column indicating that the column is inactive and the month won't be filled for that column. The inactive column is also de-selected from the list.

6. A validation message appears to indicate the month has been filled with the weekly template.

7. To clear the month and begin again click the **[Clear the Month]** button.

How many far in advance should we set up the KWIC Appointment Book?

WIC checks can be used for up to three months. That means when you see a client and issue three months of checks, you normally will be making an appointment for them to come back to clinic in one, two or three months. So a clinic needs the appointment book set up at least three months ahead and four months is a better idea.

Who should be assigned to set up the Appointment Book?

It can be any staff member that makes sense for that clinic as determined by the WIC Coordinator. But **someone** is to have the normal task of regularly keeping the future appointment book set up. Usually this means having going into the calendar on a regular basis to make any adjustments to Holidays and Special Events, Weekly Template, and then use Fill Month for the next month that needs to be opened in KWIC. (This person needs to be trained and given KWIC Administrator security clearance.)

It is critical that there be a back-up person with KWIC Administrator security clearance and training in setting up the calendar, to fill in during illness, vacation, etc.

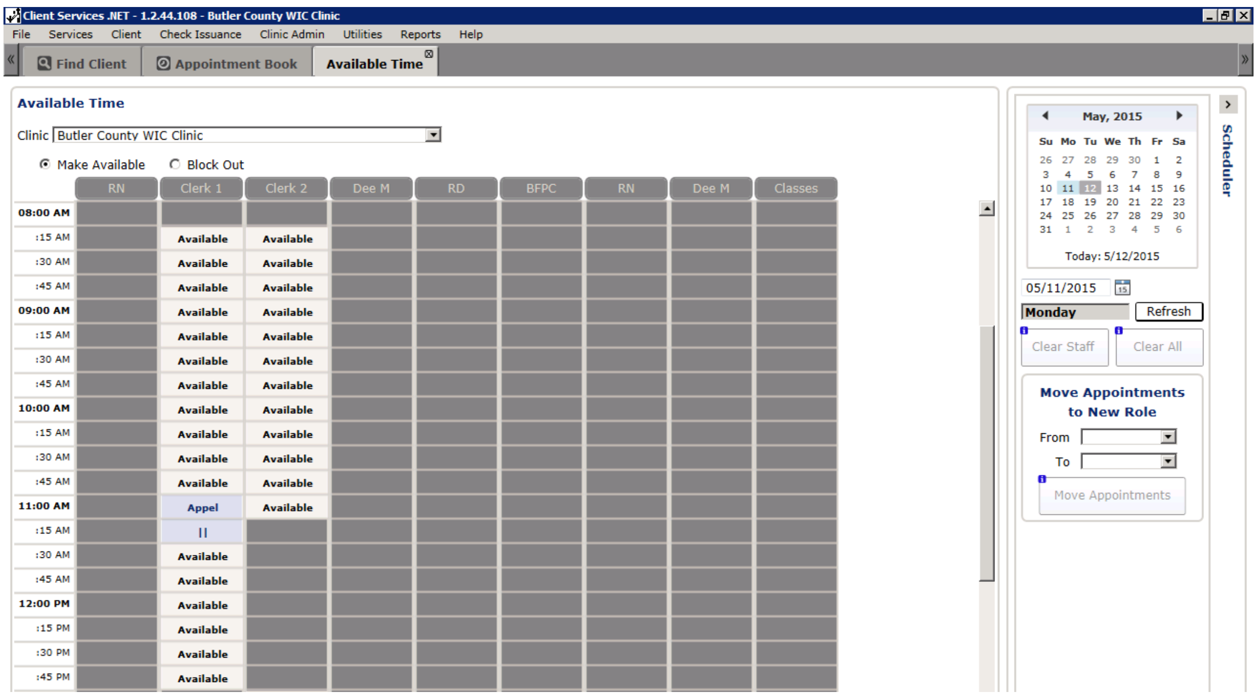
Available Time

This window is used to customize daily schedules, i.e. add or change staff available times for each day of the month. The Available Time window is also used to make adjustments to the schedule if a holiday or special event is added **after** the schedule has been created for a given month.

This window looks and feels like the Appointment Book window in many ways.

To Add Staff Available Times for Each Day of the Month:

1. From the Menu bar, select Clinic Admin – Staff Calendar – **Available Time**.



2. Select a **Clinic**.

3. Select a day on the Calendar by clicking it.

    a. Make sure the correct month is selected by using the arrows below the calendar.
    b. If there are any appointments already scheduled, the client's last name displays as on the normal appointment book.

4. Remember that Column descriptions (labels at the top of the column) are set up in the Appointment Book – Columns window.

    a. Work with one column at a time.

5. To add hours, click on the **[Make Available]** radio button and then click in every time cell you want to open. Or as described in the Weekly Template section, left click in the first time cell you want opened and right click in the last, and all the cells between will be opened for the designated role.
6. Click **[Save]**.
7. If you are just adding time for one column on one day, you are done. If you need to add time to other columns on the selected day, **repeat** this process for every column needed on the selected day.
8. **Repeat the process for any other days if needed.**

To <u>Block Out</u> Staff Times for Each Day of the Month:

1. To clear time for a staff person, click the [**Block Out]** radio button, then click in the time slots needing to be blocked (either clicking in each cell, or left clicking in the first and right clicking in the last cell.)
2. Click **[Save]**.

To <u>Clear A Whole Day</u> of the Month:

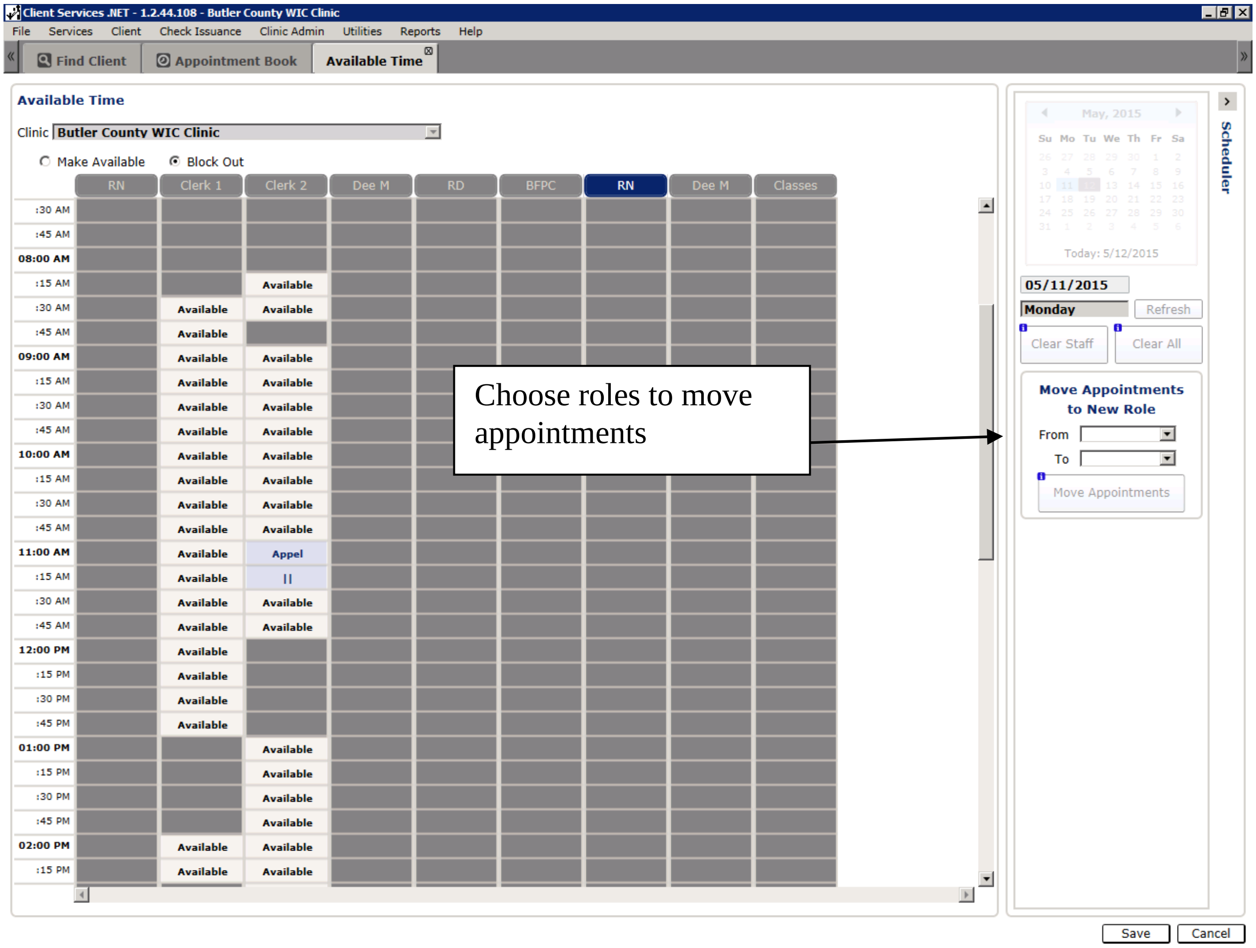
For instance you forgot to enter a holiday on the Holidays and Special Events window before using Fill Month. Or the State Agency has notified you of a required training after you already have set up your calendar with Fill Month.

1. Select a day on the calendar.
2. Click in a slot for the staff person
3. Click **[Clear Staff].** Or click **[Clear All]** to clear the day for all staff in the clinic.
4. Click **[Save]**.

To <u>Move All Appointments to a New Column</u> for A Day of the Month:

If a staff person is sick or otherwise unavailable to see clients scheduled for a day, all appointments can be moved from one role to another using Move All Appointments to New Role.

1. Select the role appointments will be moved from.



2. Select the Role appointments will be moved to. If the new role has appointments scheduled for the same times, the appointments will be double-booked. Blocked times are unblocked.

3. Click **[Move Appointments]** button. (Almost not visible in this screen shot.)

4. Appointments scheduled for the first role are moved to the second role.

Many administrators do not bother with this change just when someone is sick. Other staff members just work in the clients that had been scheduled for the ill staff member.

Skill Builder – Staff Calendar

Complete the following activity:

Use the Staff Calendar windows to complete each of the following tasks.

- Use the Appointment Book Columns window to add your own first name. Select a display order that you choose.

- Use the Holidays and Special Events window. Go at least five months in the future and add a:
    - full day holiday and
    - a four hour staff training event.

- Use the Weekly Template window to create a weekly template for clinic staff.

- Use the Fill Month Window to create a monthly calendar for clinic staff. (You will have to go about five months in the future.)

- Use the Available Time Window to:
    - Add a vacation day for one staff member that you choose. (Hint: Clear those times for that staff member.)
    - Add a two hour staff meeting on a day of your of your choice. (Hint: Clear those times for staff.)

Utilities

Utilities are used to add and update names and information used in drop-down lists and mover boxes throughout the Client Services application. Most of the names and information are entered at the State WIC office, but Local Agencies may add data to some utilities based on their specific needs.

A staff member with KWIC Administrator security clearance has access to all of these utilities. To make things easier in clinics, some of these utilities can also be accessed by staff with other security clearance levels as shown in the utility list below.

Client Services Utilities available for Local Agency use:

Utility	KWIC Security Clearance Required to Access the Utility
Announcements	KWIC Administrator
Class Names	KWIC Administrator, RD
Handout	KWIC Administrator, RD
Referrals To	KWIC Administrator, Breastfeeding Peer Counselor
Referrals From	KWIC Administrator, Breastfeeding Peer Counselor
Reminders Client	KWIC Administrator
Reminders Staff	KWIC Administrator
Topics	KWIC Administrator, RD
Survey Questions	KWIC Administrator, RD
Survey Answers	KWIC Administrator, RD
Change User Password	Any level of KWIC Client Services Security Clearance

Using Utilities - Overview

All Utilities mostly work the same way. They consist of

- a list box, where all records are listed in alphabetic or Display Order, and
- edit fields that display below the list box when **[Add]** is clicked or an item is highlighted.

Utilities cannot be deleted once they are saved so take care when entering data in the edit fields. They can be inactivated if you make an error.

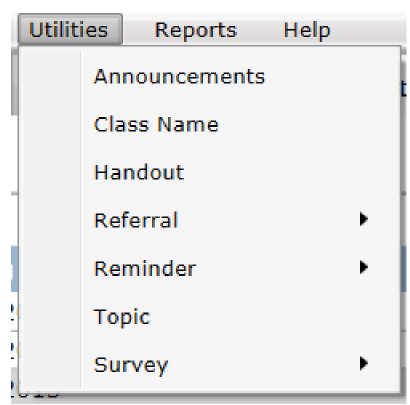
Most of the Utilities contain Display Order and Inactive Date fields.

- **Display Order** - Entering a number in the display order field sorts the list based on the number entered. Using display order numbers in multiples of 5 or 10 provides the option of entering a number between the multiples when adding new items to the list. The Display Order field will accept values from 1 to 999.

- **Inactive Date** - If the selected item is given an Inactive Date, that item will no longer appear in lists or mover boxes after the specified date or will be inactivated by being highlighted in red.

Utilities entered by the State WIC Office contain a “Yes” in the statewide column of the list box. These items may not be edited by Local Agency staff.

Here are a few general instructions for using Utilities:



To Enter a New Record in a Utility

1. Select the Utilities menu.

2. Select the specific Utility to open.

3. Click **[Add].**

4. Enter the new data.

5. Click **[Save]**.

Thoroughly consider the exact wording that you want to enter in a Utility data field. Type it carefully! Utility names can not be edited.

For example, you misspell a Topic Title when you enter it in Utilities and save. The only thing that can be done is inactivate the one with the misspelling and replace it with the topic spelled correctly.

To Modify a Record in a Utility (including Inactivation)

Note: Once a new utility has been saved, only certain data fields may be edited, such as display order. The title can not be changed.

1. Select the Utilities menu.

2. Select the specific Utility to open.

3. Highlight the record to be modified.

4. Make the changes in the data entry fields. If the desired change is to inactivate the entry, enter an Inactive Date.

5. Click **[Save]**.

Associating Items to a Specific Client Category

Some Utilities must be associated with a specific client category so KWIC will display them on the appropriate screen. When you enter a new handout, topic, health concern, or survey question, you must specify in KWIC with which client categories that item should be associated.

1. When entering a new handout, topic or survey question the data fields will include a client category check box list if more than one can be selected

2. Choose the desired client categories.

3. Choose a record to be associated with the client category.

4. Click **[Save]**.

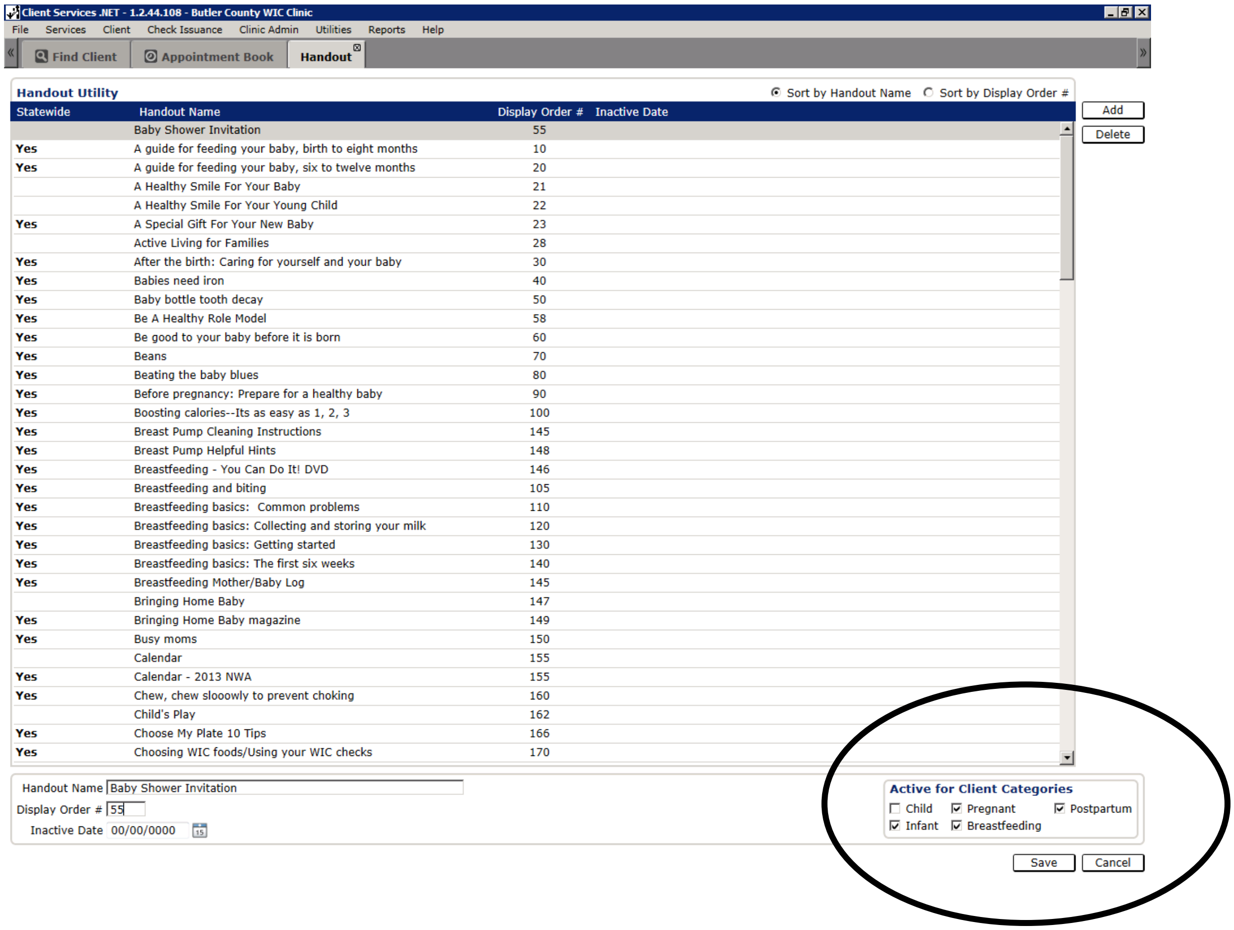
Utility Example – Handouts

1. From the Menu bar, select Utilities - **Handout**.

2. Click **[Add]** and blank data fields will display beneath the handout list.

3. Your clinic is planning a special promotion event that you are labeling a baby shower. You have a handout that is an invitation that you want to put in the Handout list so staff can document that it was given. The audience is women who are pregnant,

breastfeeding, or postpartum, and infants. The screen shot shows the data entered, but before saving.



Client Services .NET - 1.2.44.108 - Butler County WIC Clinic

File Services Client Check Issuance Clinic Admin Utilities Reports Help

Find Client | Appointment Book | Handout

Handout Utility — Sort by Handout Name / Sort by Display Order #

Statewide	Handout Name	Display Order #	Inactive Date
	Baby Shower Invitation	55	
Yes	A guide for feeding your baby, birth to eight months	10	
Yes	A guide for feeding your baby, six to twelve months	20	
	A Healthy Smile For Your Baby	21	
	A Healthy Smile For Your Young Child	22	
Yes	A Special Gift For Your New Baby	23	
	Active Living for Families	28	
Yes	After the birth: Caring for yourself and your baby	30	
Yes	Babies need iron	40	
Yes	Baby bottle tooth decay	50	
Yes	Be A Healthy Role Model	58	
Yes	Be good to your baby before it is born	60	
Yes	Beans	70	
Yes	Beating the baby blues	80	
Yes	Before pregnancy: Prepare for a healthy baby	90	
Yes	Boosting calories--Its as easy as 1, 2, 3	100	
Yes	Breast Pump Cleaning Instructions	145	
Yes	Breast Pump Helpful Hints	148	
Yes	Breastfeeding - You Can Do It! DVD	146	
Yes	Breastfeeding and biting	105	
Yes	Breastfeeding basics: Common problems	110	
Yes	Breastfeeding basics: Collecting and storing your milk	120	
Yes	Breastfeeding basics: Getting started	130	
Yes	Breastfeeding basics: The first six weeks	140	
Yes	Breastfeeding Mother/Baby Log	145	
	Bringing Home Baby	147	
Yes	Bringing Home Baby magazine	149	
Yes	Busy moms	150	
	Calendar	155	
Yes	Calendar - 2013 NWA	155	
Yes	Chew, chew slooowly to prevent choking	160	
	Child's Play	162	
Yes	Choose My Plate 10 Tips	166	
Yes	Choosing WIC foods/Using your WIC checks	170	

Add | Delete

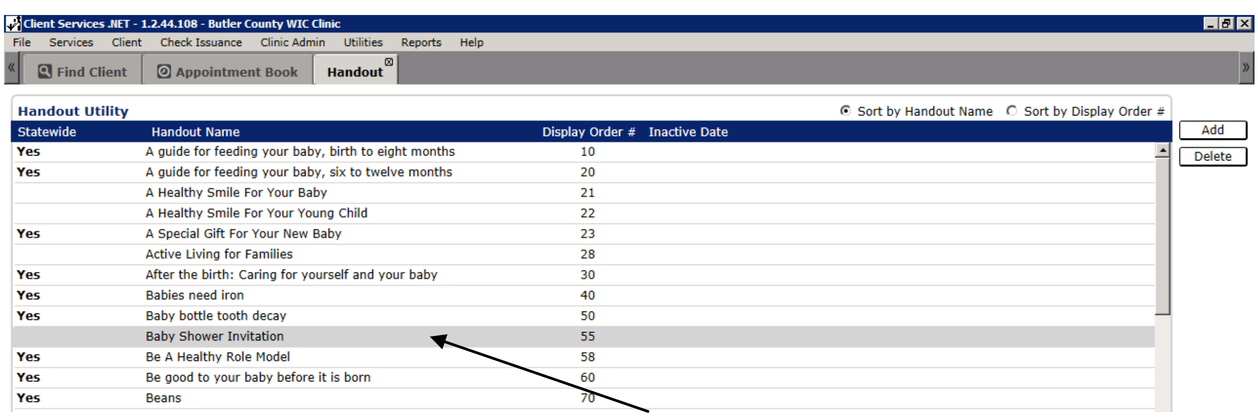
Handout Name: Baby Shower Invitation
Display Order #: 55
Inactive Date: 00/00/0000

Active for Client Categories: Child, Pregnant (checked), Postpartum (checked), Infant (checked), Breastfeeding (checked)

Save | Cancel

4. Click **[Save]**.

5. Now the handout displays in the list, according to the display order entered. Notice that the name in the detail fields is aqua – and can not be edited. Did you spell it right? If not, you must inactivate and start over.



Client Services .NET - 1.2.44.108 - Butler County WIC Clinic

File Services Client Check Issuance Clinic Admin Utilities Reports Help

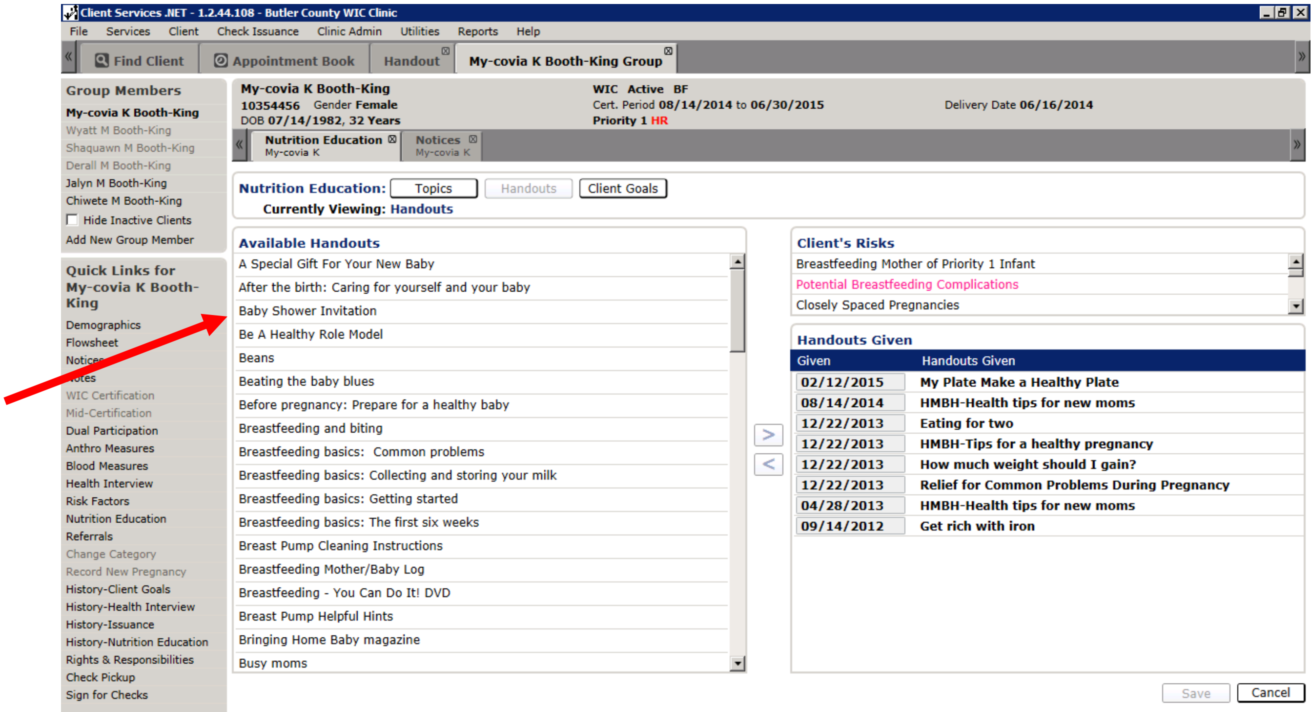
Find Client | Appointment Book | Handout

Handout Utility — Sort by Handout Name / Sort by Display Order #

Statewide	Handout Name	Display Order #	Inactive Date
Yes	A guide for feeding your baby, birth to eight months	10	
Yes	A guide for feeding your baby, six to twelve months	20	
	A Healthy Smile For Your Baby	21	
	A Healthy Smile For Your Young Child	22	
Yes	A Special Gift For Your New Baby	23	
	Active Living for Families	28	
Yes	After the birth: Caring for yourself and your baby	30	
Yes	Babies need iron	40	
Yes	Baby bottle tooth decay	50	
	Baby Shower Invitation	55	
Yes	Be A Healthy Role Model	58	
Yes	Be good to your baby before it is born	60	
Yes	Beans	70	

Add | Delete

6. When we open the Nutrition-Education window for a client in one of those categories, we see the new handout listed. This screen shot is for a breastfeeding woman. The handout will also be listed for I, PP, and PG clients.



7. When the handout is no longer needed, the Utility-Handout can be opened again, and the handout given an appropriate inactive date.

More about Specific Utility Screens

Now that you how the Utility screens function, here is a list of the different utilities and key points about each. Remember that the State WIC Staff will enter most items on these screens, but you have the option of adding agency-specific items.

Announcements

This utility is used to create announcements that will show up on the KWIC Dashboard. These may be entered by State WIC Staff as well as local staff. It is important to remember to add a start and end date for these announcements so that they do not appear longer than necessary.

Class Names

This utility is used to create and change class names that appear in the Class Management window and the Class pop-up on the Appointment Book.

Class names are sorted alphabetically. Names that start with "The" as in "The Benefits of Breastfeeding" will be displayed with other class titles starting with the letter "T". So be careful how you title a new class. In this example, it might be easier if you select just "Benefits of Breastfeeding" or even "Breastfeeding Benefits."

Handouts

The Handouts utility is used to maintain a list of handouts available for staff to give to clients. Handouts entered here are available on the Nutrition Education – Handouts tab for each client category specified in the utility (as already discussed.)

Referrals To

The Referrals To utility is used to track the organizations/services to which WIC staff members refer clients. (Example: Food Bank, Domestic Violence) The utility is used to add new Referral To descriptions, edit an existing Referral To description, or assign an Inactive Date to an existing Referral To description. (Local staff can not modify a state-wide entry.)

Referrals entered here populate the selection list in the Current Referrals to Client section of the Referrals window. They also will populate the "Referrals To" report.

If there is a generic organization already listed as a state-wide item (e.g. Food bank), there is not much reason to enter the specific name of your local organization (e.g.

Helping Hearts). On the other hand, if you have a special local program to which you really want to track the number of referrals, you should enter the local name in the Referrals To Utility.

Referrals From

The Referrals From utility is used to track how clients heard about WIC. (Example: Kan Care, Food Assistance) The window is used to add new Referral From descriptions, change, or delete an existing Referral From description, or assign an Inactive Date to an existing Referral From description. (Local staff can not modify a state-wide entry.)

Referrals entered here populate the selection list in the Sources of Client Referral to WIC in the Referrals window. They also will populate the “Referrals From” report.

Why might you ever want to add a local item to the “Referrals From” list? Perhaps your clinic is conducting a special outreach program in which you printed a list of inactive clients from the KWIC Ad Hoc reports and then mailed invitations to reapply. To track the effectiveness of your project, you decided to ask all new applicants if they received the letter. To enable staff to track those who did reapply because of the outreach letter, you could add something like “Outreach letter” in the “Referrals From” Utility. You could print a report to see the numbers, and then when the project was done, you could inactivate it.

Reminders – Client

The Reminders - Client is used to enter and maintain client reminder types to populate the Client Reminders drop-down lists in the Reminders tab on the client's Homepage.

Reminders – Staff

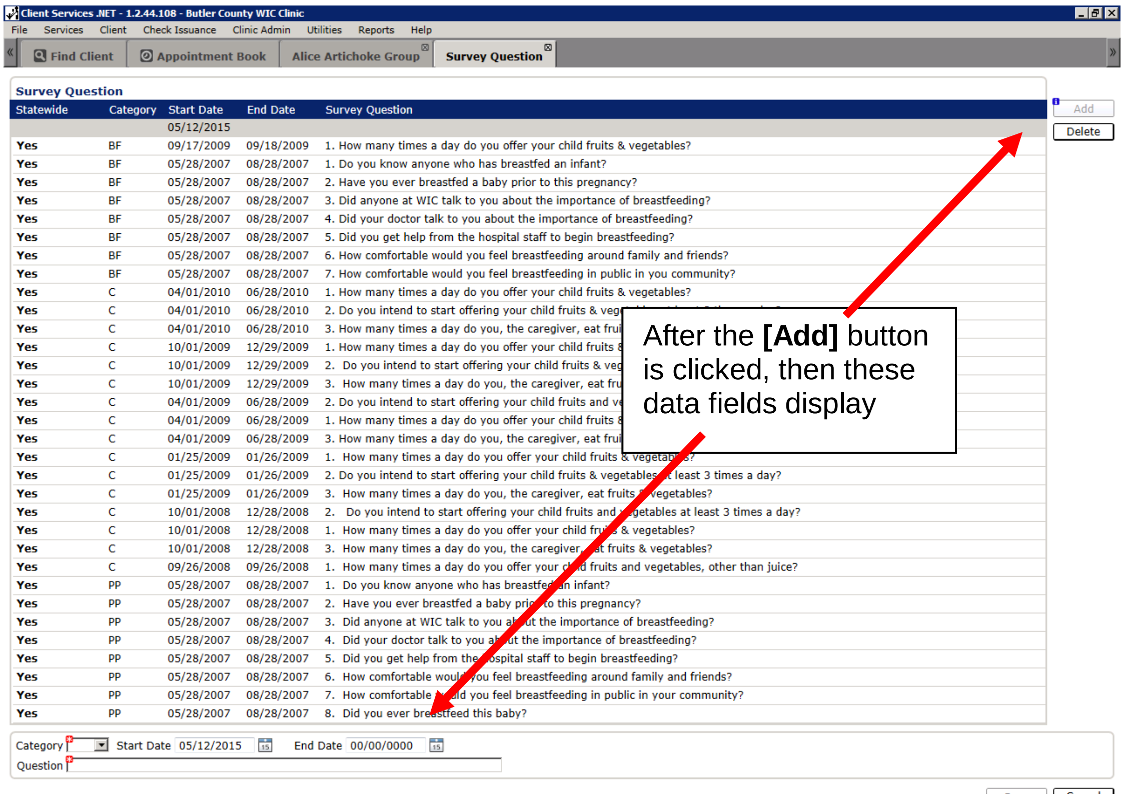
The Reminders - Staff utility is used to enter and maintain staff reminder types to populate the Staff Reminders drop-down lists in the Reminders tab on the client's Homepage.

Topics

The Topics utility is used to maintain the list of topics that appear on the Topics tab in the Nutrition Education window. This is one of the utilities that you must associate client categories when you add an item.

Survey Questions

The Survey Questions utility is used to enter questions that are displayed as a link on the Client's Home page to ask when the State or local agency is conducting a survey.



Category – select the category to which the survey question applies. **If a survey question applies to multiple client categories it must be entered for each client category.**

Start Date – enter the date that you want to question to be available in Client Services. Usually this is the date staff should begin asking the survey question. You might enter an earlier date to be able to do a little training for staff and then have them start on the date you want.

End Date – enter the date that you want the question no longer available in Client Services and staff will stop asking the survey question. The question will not be available on this date, so pick the day after you want people to still answer the question.

Question – enter the survey question **as it should be stated to the client**. The list of survey questions is sorted by client category, then by date with the most current date at the top of the list.

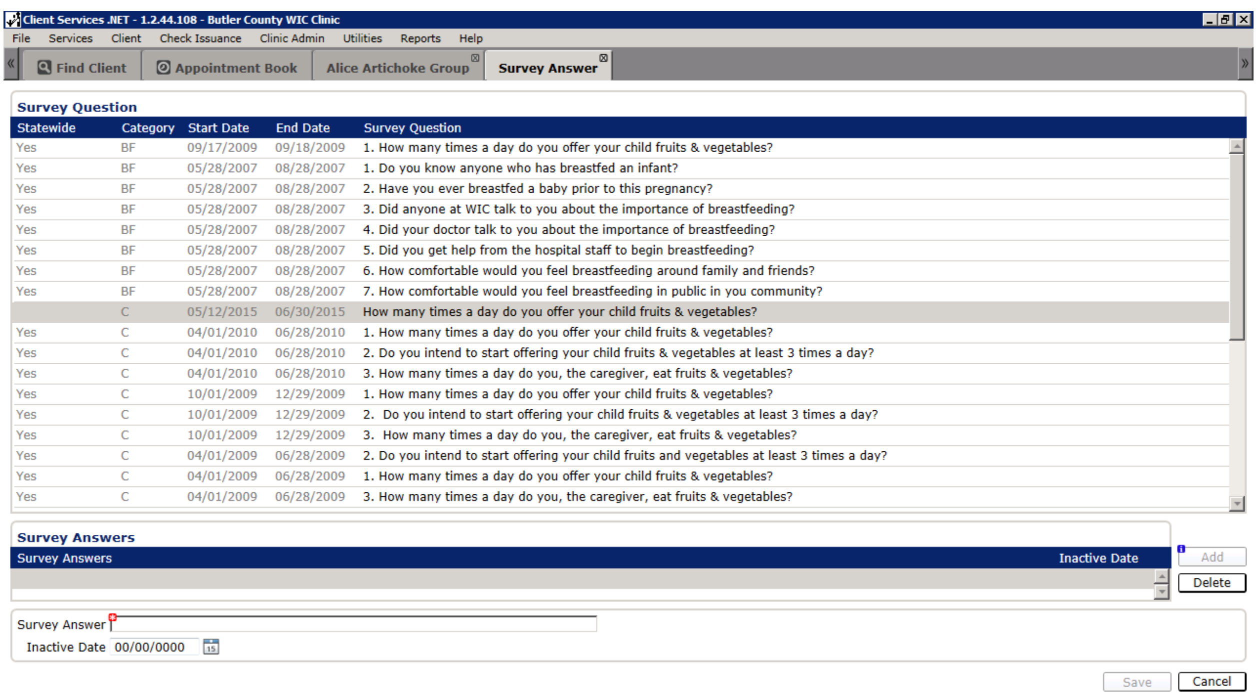
Statewide - a "Yes" in this column indicates if a record was generated by the State. Local Agencies cannot modify these records.

Let's practice!! Open the Survey Question window and click along with this example.

- Click **[Add]**.
- Category – We only want staff to ask the caregivers of children, so enter "C".
- Start Date – You usually will pick a start date in the future, but here, pick today's date so you can see the question in client services today.
- End Date - Pick a future date. Remember, the question is NOT available any more on the end date.
- Question – Enter "How many times a day do you offer your child fruits & vegetables?"
- Press **[Save]**.

Survey Answers

The Survey Answers utility is used to enter possible answers to Survey Questions entered on the Survey Question tab.



This screen works differently from the other utilities in that you must:

- Click on the question for which you want to create answers, and then
- Click **[Add]** to get the blank data fields to appear.

Survey Question – highlight a Survey Question in the top box. The list of Survey Questions is sorted by client category, then by Start Date with the most current date at the top of the list.

Survey Answer – this field displays when [Add] is clicked. Enter a response to the question highlighted.

- For each choice, you need to save, and then enter another answer choice for the same question. The list of Survey Answers is sorted by the order in which the answers were input.

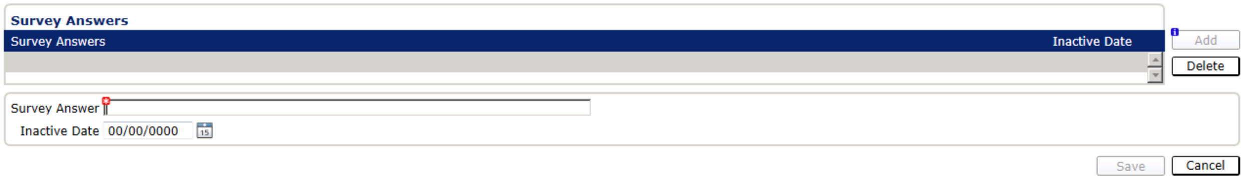
- As with the questions, you should carefully consider your answers. Will you really get the information that you want? It is always a good idea to ask for technical assistance, as well as conduct a pilot test.

Inactive Date - determines the date an item is no longer available in associated lists; though inactive items are available in historic records.

Statewide - a "Yes" in this column indicates if a record was generated by the State. Local Agencies cannot modify these records.

Continue with the practice that you started...

- Click on the question that you just entered – "How many times a day do you offer your child fruits & vegetables?"
- These are the possible answer choices to be entered – 0, 1, 2, and 3+.

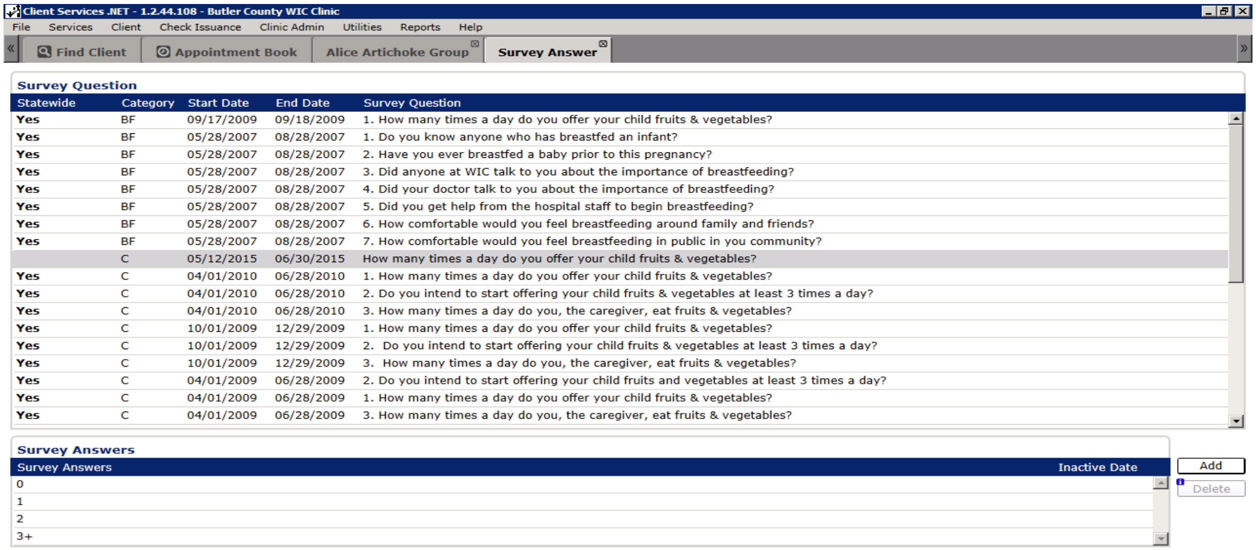


- Click **[Add]** and enter "0" in the Survey Answer line, along with the same Inactive Date that you entered for the question. (If you forgot that date you can open the Survey Question window and check.) Save.

- Click **[Add]** and enter "1" in the Survey Answer line, along with the same Inactive Date. Save.

- Repeat for the remaining answer choices to enter (2 and 3+ for this example).

Here is the appearance of the screen after entering all answers, saving and clicking back on the same question.



Client Services .NET - 1.2.44.108 - Butler County WIC Clinic

File Services Client Check Issuance Clinic Admin Utilities Reports Help

Find Client | Appointment Book | Alice Artichoke Group | Survey Answer

Survey Question

Statewide	Category	Start Date	End Date	Survey Question
Yes	BF	09/17/2009	09/18/2009	1. How many times a day do you offer your child fruits & vegetables?
Yes	BF	05/28/2007	08/28/2007	1. Do you know anyone who has breastfed an infant?
Yes	BF	05/28/2007	08/28/2007	2. Have you ever breastfed a baby prior to this pregnancy?
Yes	BF	05/28/2007	08/28/2007	3. Did anyone at WIC talk to you about the importance of breastfeeding?
Yes	BF	05/28/2007	08/28/2007	4. Did your doctor talk to you about the importance of breastfeeding?
Yes	BF	05/28/2007	08/28/2007	5. Did you get help from the hospital staff to begin breastfeeding?
Yes	BF	05/28/2007	08/28/2007	6. How comfortable would you feel breastfeeding around family and friends?
Yes	BF	05/28/2007	08/28/2007	7. How comfortable would you feel breastfeeding in public in you community?
	C	05/12/2015	06/30/2015	How many times a day do you offer your child fruits & vegetables?
Yes	C	04/01/2010	06/28/2010	1. How many times a day do you offer your child fruits & vegetables?
Yes	C	04/01/2010	06/28/2010	2. Do you intend to start offering your child fruits & vegetables at least 3 times a day?
Yes	C	04/01/2010	06/28/2010	3. How many times a day do you, the caregiver, eat fruits & vegetables?
Yes	C	10/01/2009	12/29/2009	1. How many times a day do you offer your child fruits & vegetables?
Yes	C	10/01/2009	12/29/2009	2. Do you intend to start offering your child fruits & vegetables at least 3 times a day?
Yes	C	10/01/2009	12/29/2009	3. How many times a day do you, the caregiver, eat fruits & vegetables?
Yes	C	04/01/2009	06/28/2009	2. Do you intend to start offering your child fruits and vegetables at least 3 times a day?
Yes	C	04/01/2009	06/28/2009	1. How many times a day do you offer your child fruits & vegetables?
Yes	C	04/01/2009	06/28/2009	3. How many times a day do you, the caregiver, eat fruits & vegetables?

Survey Answers

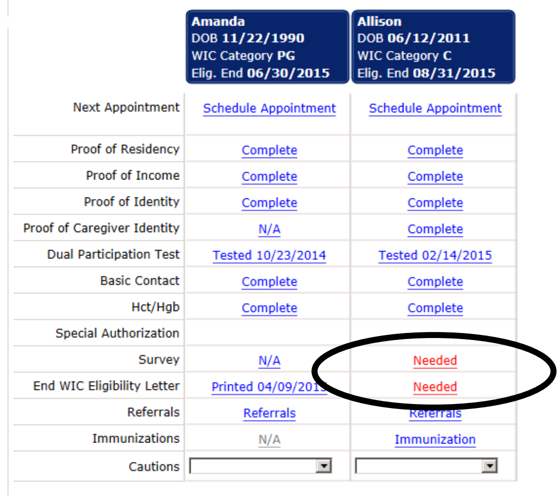
Survey Answers	Inactive Date
0	
1	
2	
3+	

Add Delete

Once you have saved, you need to check your work.

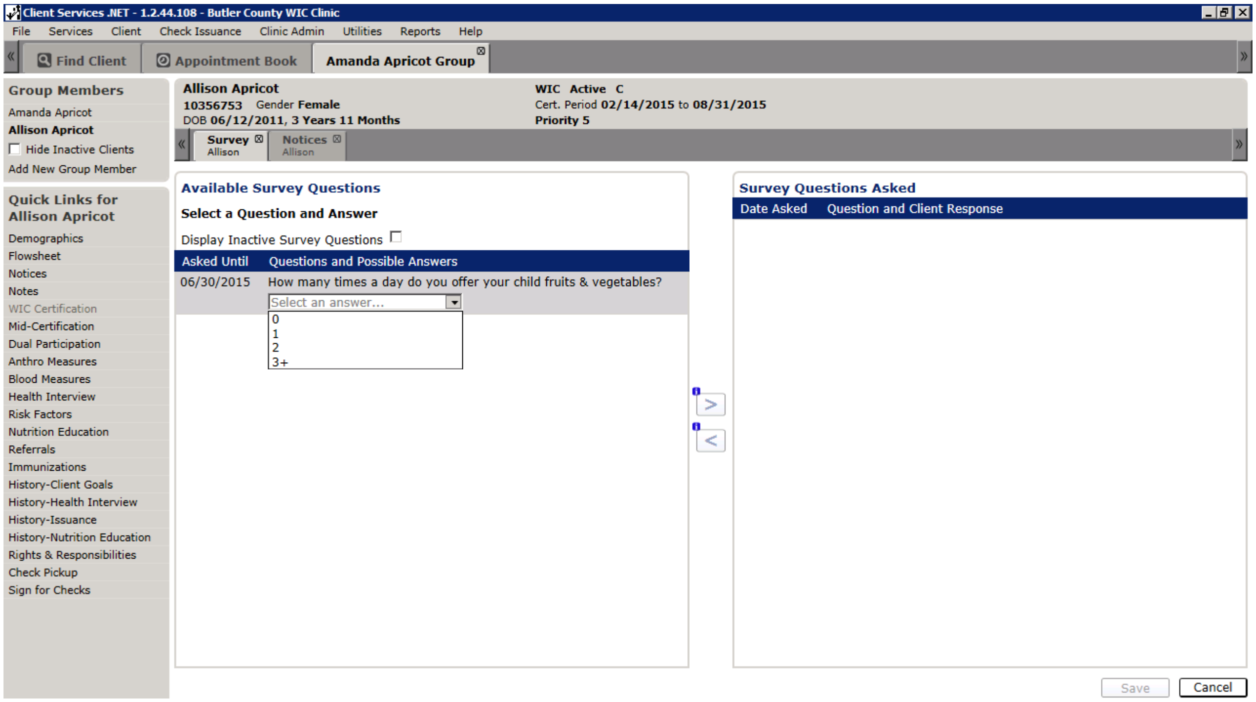
Go to Find Client and select an active client in the appropriate category - in this example, an active child.

Find Allison Apricot and retrieve her record.
On the Client Homepage, look at the "Needed" reminder in the Survey row. This tells staff there are active survey questions.



	Amanda DOB 11/22/1990 WIC Category PG Elig. End 06/30/2015	Allison DOB 06/12/2011 WIC Category C Elig. End 08/31/2015
Next Appointment	Schedule Appointment	Schedule Appointment
Proof of Residency	Complete	Complete
Proof of Income	Complete	Complete
Proof of Identity	Complete	Complete
Proof of Caregiver Identity	N/A	Complete
Dual Participation Test	Tested 10/23/2014	Tested 02/14/2015
Basic Contact	Complete	Complete
Hct/Hgb	Complete	Complete
Special Authorization		
Survey	N/A	Needed
End WIC Eligibility Letter	Printed 04/09/2015	Needed
Referrals	Referrals	Referrals
Immunizations	N/A	Immunization
Cautions		

- Click on the "Needed" link and the survey window will open.
- Check to be sure your question is there. Use the scroll bar if needed to see the entire question.
- Click on the question to make the answers display.
- Check that the answers are all there and correct.



A final note about survey questions...

Be careful in your wording. It is recommended that you ask your assigned state staff member for technical assistance and pilot test the question. It is hard to write good survey questions that get the information you really intend.

After you save, you can not edit the category or question – only the start and end dates. If you want to change a category, question or answer after saving, you need to change the inactive date to make the item currently inactive and start again.

Skill Builder - Utilities

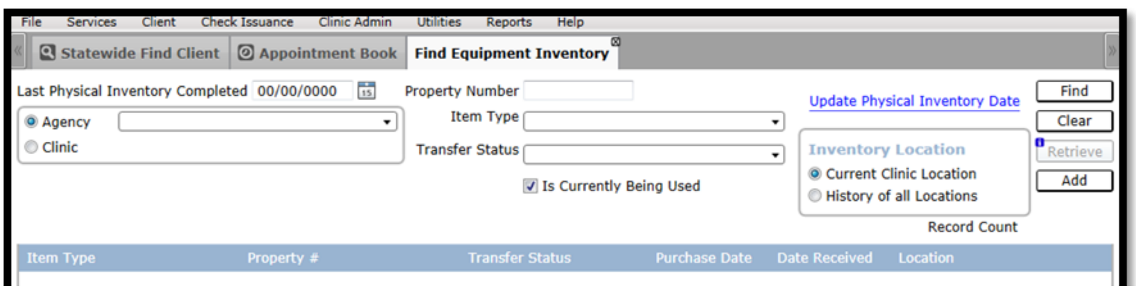
1. Your clinic is starting a breastfeeding support group and you want to be able to document referrals to pregnant and breastfeeding women. Use the **Referrals To** utility to add "Breastfeeding Support Group". After saving, check your work by opening an active client (Barbara Broccoli) and open the Referrals To window. Click **[Add]** to get a new blank referrals line. Click in the drop down box and look for what you just added in the Referrals To utility.

2. Your dietitian developed a handout about constipation in infants and children. Use the **Handouts** utility to add the title. (You can decide the exact title.) Be sure to check the Infant and Child categories so the title will appear for both. After saving, check your work by opening an active infant (Barry Bean) and active child (Kevin Kale) and looking on the Nutrition education – Handout window.

Equipment Inventory – Adding to the Equipment Inventory

(Refer to policy [ADM: 02.03.06 Equipment Inventory](#).) Most of the features of the KWIC Equipment Inventory are accessible to staff with any KWIC security clearance level. Complete training can be found in the [Instructions for Using the Equipment Inventory in KWIC](#). However only staff with KWIC Administrator security clearance may add to the Equipment Inventory. That information follows.

- To add a new piece of equipment to your clinic's inventory, you will need to first retrieve the inventory, by going to the Clinic Admin menu and select Equipment Inventory. Once the Find screen is open, you will see the fields to search through your inventory as well as four buttons to the right, Find, Clear, Retrieve, and Add. To start, click on Add.   Refer to Find Screen screenshot for an example of the screen.

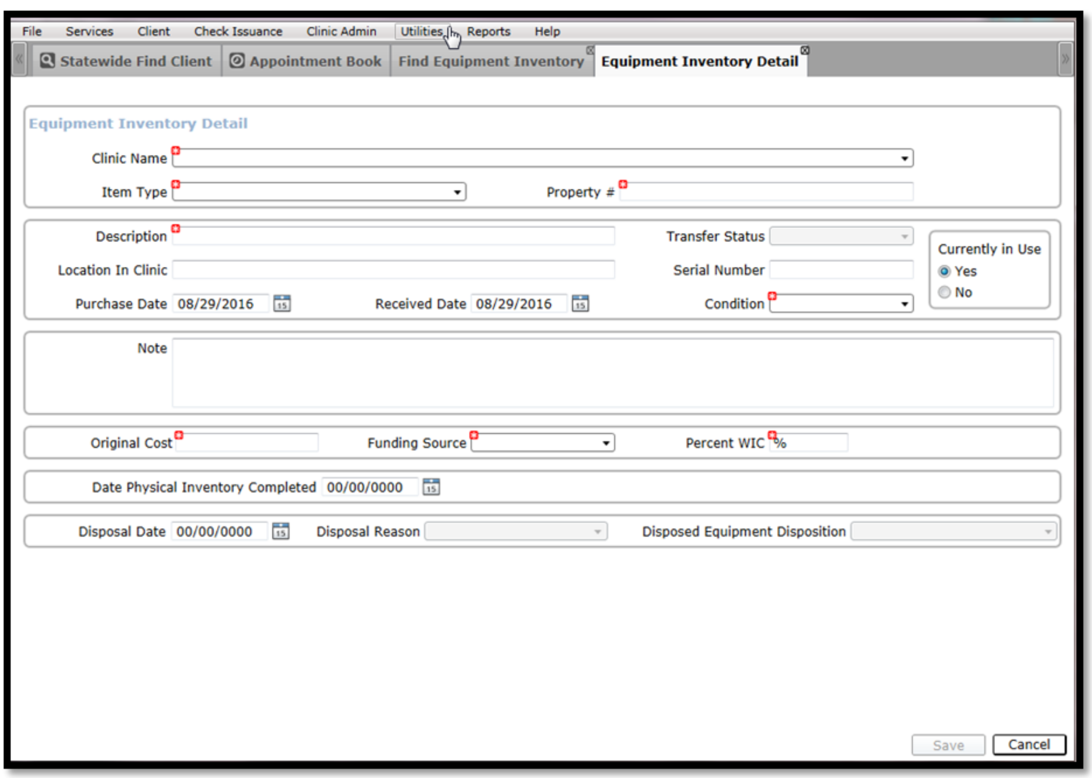


- The Add screen fields are the same as the Detail screen fields previously listed, however there are certain fields that you **must** complete in order to have the Save button enabled. In KWIC, the following required fields will be marked with the usual red asterisks that you are used to seeing in the system, but they are also listed below for quick reference:
    - Clinic Name
    - Item Type
        - What the item is. (Desktop, laptop, printer, etc.)
    - Property #
        - This is the KDHE property sticker number.
    - Description
        - A brief explanation of what the equipment is. (Please include **Brand, model number**, etc.)
    - Purchase Date
        - When the item was purchased. The system will default this to today's date for you. You are able to change this date to the actual date of purchase.
    - Received Date
        - When the item was received. The system will default this to today's date for you. You are able to change this date to the actual date of receipt.

- Condition
  - Condition of the item. (In Working Condition, In need of repair, etc.)
- Original Cost
  - Amount of the item.
- Funding Source
  - What funds were used to purchase it? (WIC, Other Program, etc.)
- Percent WIC
  - Percentage of WIC funds used to purchase it. (50%, 100%, etc.)

- There are a few other fields that if you have the information to complete them, you should go ahead and fill them in at this time. The more information you have on a piece of equipment, the better. The fields that are not required to save the record, but should be completed if they can be are:
  - Location in Clinic
    - Where the item will be located in the clinic. (Clerk's desk, Exam room, etc.)
  - Serial Number
    - Enter if the item has a manufacturer's serial number.
  - Note
    - Anything that might need to be known about the equipment.
  - Currently In Use
    - Is the item in use? (Yes, No). The system defaults this to Yes for you.

- Here is a blank Add screen.



- Once you have completed all the fields for the item, you can go ahead and select the Save button. The item is now in your Equipment Inventory. If for some reason after you select save and you realize you have entered something on that record in error, you may retrieve the record and correct the information the **same day** the record was created. (Also known as the "Cinderella" rule; the data magically become permanent at the stroke of midnight!) After that initial day, only certain fields are editable. If what you need to change is not one of the editable fields listed under the Detail screen above, you will need to follow the process detailed in policy ADM: 02.03.07 Disposal, Transfer and Deletion of Equipment to have the SA delete the incorrect record. Once it is deleted, you will then need to repeat the process above and add the equipment back into your inventory.

The End