

# Subsequent Certification/Change Category

This module applies to the following security roles:

Clerk  
RN/RD



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

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# Subsequent Certification

## Definitions

Initial Certification – a client’s first certification as a new applicant or after a break in service. Often also called new certification.

Subsequent Certification – certification of an existing WIC client with a status of Active or Expired. Often referred to as a recertification.

## Subsequent Certification Rules

- Infants and Children can be recertified up to 60 days prior to their current Eligibility End Date.
- Women (PG, BF, PP) can be recertified at any time during their current certification.
- The Eligibility End Date is the last day of the month. **If you recertify an Active client, KWIC stops the previous certification period, and starts the subsequent certification period on the day it is completed. Recertification begins a new certification period starting today.**
- Pregnancy records and new birth records are recorded as explicit events.
- Pregnancy information carries forward from the PG certification to the BF/PP certification.
- Some information from a child’s certification carries forward to subsequent certifications. Birth information carries forward to subsequent certifications.

## Subsequent Certifications for Infants and Children

Infants and Children can be certified up to 60 days prior to their current Eligibility End Date. To complete a subsequent certification just open the WIC Certification Guide as long as the client has not had a break in service and today's date is 60 days or less from the client's current Eligibility End Date.

The system will adjust the client's category from Infant to Child when the WIC Certification Guide is opened for an infant within 60 days. In all cases choose "C" for child.



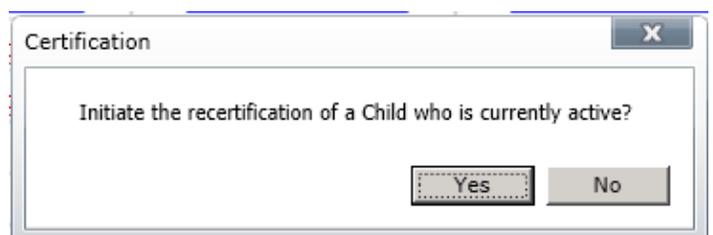
**Important Note:** If the client is being recertified before the end of their current certification the links on the Notices tab for Proofs, Income, and Basic Contacts will display as Completed. This is because these tasks were completed for the client's current certification. They will need to be completed again for subsequent certifications. Click on the Completed link and enter current information or open the WIC Certification Guide from the Services menu and use the WIC Cert Guide links to enter the information gathered. The WIC Certification Guide link does not display in the Quick Links for clients with a status of active. Access it through the Services drop-down choices from the Menu bar.

## Subsequent Certification for a Client with Active Status

### Complete these steps:

Logan Lemon is at your clinic for his certification appointment. Logan is near the end of his certification period and needs to be recertified.

1. Retrieve Logan's record.
2. Notice that:
  - a. Logan's status is Active. This means that his Eligibility End Date has not passed.
  - b. The WIC Certification Guide link does not display in the Quick Links.
3. Select the WIC Certification Guide from the Services menu to complete a subsequent certification.
4. The following message displays. Click Yes



5. The Certification Guide displays. You've learned about the Certification Guide in a different module so that information is not repeated here.
  - a. **Clerks:** Discuss with your supervisor which links on the Certification Guide you will complete for a subsequent certification.
  - b. **RNs and RDs–** Discuss with your supervisor which links on the Certification Guide you will complete for a subsequent certification.

If you want extra practice, complete the certification. Otherwise, close Logan's record and move on.



**Note:** Here in the training environment there are no limitations to open features. In a real clinic, clerks are not able to access or complete the “Assess Risk Factors” link or “Complete WIC Certification” links. Those activities must be completed by a CPA.

## Subsequent Certification for a Client with Expired Status

### Complete these steps:

Hazel Jicama is at your clinic for her certification appointment. Hazel's Caregiver had to cancel her certification appointment that was scheduled to occur before the Eligibility End Date of her previous certification. Her Caregiver could not bring her to the clinic until a few days after the date her eligibility for WIC ended.

1. Retrieve Hazel's record.
2. Notice Hazel's status (Expired). This means that his Eligibility End Date has passed but she has arrived at your clinic within 30 days of that date.
3. Notice the WIC Certification Guide link does display in Quick Links. Open the WIC Certification Guide.

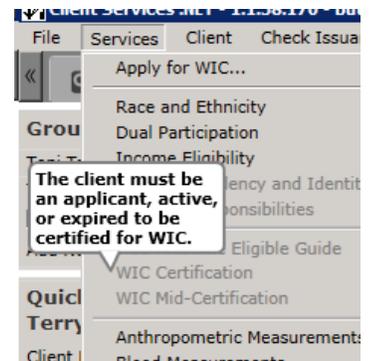
If you want extra practice, complete the certification. Otherwise, close Hazel's record and move on.

## Subsequent Certification for a Client with Terminated Status

### Complete these steps:

Toni Tangerine and her son Terry Tangerine are at your clinic for his certification appointment. Terry did not come in to the clinic before his Eligibility End Date of his previous certification and at least one month has passed from that date.

1. Retrieve Terry's record.
2. Notice Terry's status is Terminated.
3. Notice that the WIC Certification Guide link does not display in the Quick Links.
4. Can you use the menu bar to select Service / WIC Certification Guide? No – it is grayed out and not available.
5. Hover your cursor over the gray WIC Certification Guide to see the hover message. KWIC will display a message that says: “The client must be an applicant, active, or expired to be certified for WIC.”



***All clients with a break in service (even if their status is Terminated for just 1 day) must have their Initial Contact Date reset by using Apply for WIC/Reapply.***

6. From the menu bar select Service / Apply for WIC / Reapply.

Review and update Terry's demographic information as needed, perform a Dual Participation check, and Save. The Reapply window is saved and Terry's Notices tab is displayed.

7. Select the WIC Certification Guide from the Services menu to complete a subsequent certification for Terry. If you want extra practice, complete the certification. Otherwise, close Terry's record and move on.
- 8.

In summary, to complete a subsequent certification for an Infant or Child with a status of:

- Active or Expired - you just open the WIC Certification Guide. The client must not have had a break in service and today's date must be 60 days or less from their current Eligibility End Date.
- Terminated – you must use the Apply for WIC – Reapply window to reset their Initial Contact Date.

## Subsequent Certifications for Women

Women (Pregnant [PG], Breastfeeding [BF], and Post Partum [PP]) can be certified at any time during their current certification, however, a woman's circumstances change and her category from her current certification may need to be changed before opening the WIC Certification Guide.

Consider the following scenarios:

**Scenario 1** – A woman applies for WIC as PG, but she has had her baby before she comes in for her certification appointment. To complete a subsequent certification for this woman as BF or PP, you must first complete the **Record End of Pregnancy** window. The Record End of Pregnancy window should be completed before making the woman an appointment for a subsequent certification appointment as BF or PP. See the Record End of Pregnancy and Record New Pregnancy training module to review how to complete these windows.

**Scenario 2** – A woman is on WIC as a PP or BF mom. She becomes pregnant again. To complete a subsequent certification for this woman as PG, you must first complete the **Record New Pregnancy** window. The Record New Pregnancy window should be completed before making the woman an appointment for a subsequent certification appointment as PG.

**Scenario 3** – A woman is listed in Find Client as an applicant and pregnant. She calls today to say that she is pregnant again. When you retrieve her record you find that her due date listed is a year in the past. She states that the previous pregnancy ended in a miscarriage and that she never came for a certification appointment. To complete a subsequent certification for this pregnant woman, you must first complete the **Record End of Pregnancy** window (for the pregnancy that ended in a miscarriage) *and* complete the **Record New Pregnancy** window (for the current pregnancy.) These windows should be completed before making the woman an appointment for certification as PG.

**In each of these scenarios, the woman's category must be adjusted before her certification can occur.**

# Change Delivered Category

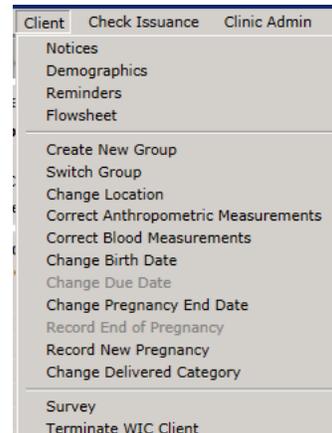
The Change Delivered Category window is used when any of the following situations occurs:

- BF client (or applicant) has stopped breastfeeding
- PP client (or applicant) has started breastfeeding

## Complete these steps:

Prudence Pineapple is in a current certification period as a breastfeeding mom. She is going back to work fulltime and has stopped breastfeeding. Her category must be changed from BF to PP.

1. **Retrieve Prudence Pineapple's record.**
2. Notice that Prudence's status is BF.
3. From the menu bar **select Client / Change Delivered Category.**
4. The Change Delivered Category window opens.



**Prudence Pineapple**      **WIC Active BF**  
10358806    Gender Female      Cert. Period 05/30/2013 to 04/30/2014      Delivery Date 04/08/2013  
DOB 08/13/1994, 18 Years      Priority 1

« **Change Delivered Category** Prudence Notices Prudence »

**Current WIC Certification**  
Category **BF**    Eligibility Begin **05/30/2013**    Eligibility End **04/30/2014**    Priority **1**  
Pregnancy End Date **04/08/2013**

**Currently Assigned Risk Factors**

Recorded	Assigned Risk	PP Priority	High Risk	BF Priority	High Risk
05/30/2013	Pregnancy at a Young Age	6		1	
05/30/2013	High Maternal Weight Gain	5		1	

**Active category will be changed to PP. Please confirm new priority and eligibility dates, then click the Save button.**

**New WIC Certification**  
WIC Category **PP**    Eligibility Begin **05/30/2013**    Eligibility End **10/31/2013**    Priority **5**  
Certified 06/18/2013 04:02 PM by 01 Train

The window displays one of the following messages to indicate the change in the client's category:

- **Active category will be changed to PP. Please confirm new priority and eligibility dates, then click the Save button.** This message displays for a breastfeeding client who has stopped breastfeeding. (As you see with Prudence's record.)
- **Active category will be changed to BF. Please confirm new priority and eligibility dates, then click the Save button.** This message displays for an active postpartum client who has started breastfeeding. This situation is rare, but might occur if there was confusion in what the mother had reported, if the mother said she was going to stop but started again after counseling, etc.
- **Client does not have any risks assigned that make them eligible as PP** – this message displays for a breastfeeding client who has stopped breastfeeding if the client is Active and does not have risks assigned that make them eligible as postpartum.  
If this message displays, a [Go to the Assigned Risk Factor](#) link will also display. When the link is clicked, the Change Delivered Category window closes without making any changes and the Assign Risk Factors window opens. The user has the option of assigning risk factors making the client eligible as a postpartum client or to choose another action (e.g. Terminate the client as ineligible). If new risks are assigned, the user must reopen the Change Delivered Category window to change the client's category. NOTE: Only a CPA has security access to the Assign Risk Factors window.
- **Client is not eligible as PP because it is more than 6 months past her delivery date** – this message displays for a breastfeeding client who has stopped breastfeeding if the client is Active and her baby is more than 6 months old.

If this message displays, the [Go to the Terminate Client Window](#) link will display. When the link is clicked, the Change Delivered Category window closes without making any changes and the Terminate Client window opens for the user to terminate the client as ineligible.

- **Client does not have any risks assigned that make them eligible as BF.** This message will display if an active postpartum client has started breastfeeding and she does not have risks assigned that make her eligible as breastfeeding.

If this message displays, the [Go to the Assigned Risk Factors Window](#) will display. When the link is clicked, the Change Delivered Category window closes without making any changes and the Assign Risk Factors window opens. The user has the option to assign risk factors making the client eligible

as a postpartum client or to choose another action (e.g. Terminate the client as ineligible). If new risks are assigned, the user must reopen the Change Delivered Category window to change the client's category.

NOTE: Only a CPA has security access to the Assign Risk Factors window.

5. **Click Save on the Change Category screen for Prudence.** Notice how Prudence's category has changed from BF to PP.

<b>Prudence Pineapple</b> 10358806 Gender Female DOB 08/13/1994, 18 Years	<b>WIC Active PP</b> Cert. Period 05/30/2013 to 10/31/2013 Priority 5	Delivery Date 04/08/2013
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Notices

Remember that if you are changing a woman's category from BF to PP or PP to BF that you will usually also need to open her infant's Health Interview window and update breastfeeding information.

### Skill Builder

## Subsequent Certification for Women Change Category



- Retrieve the record of **Connie Celery** (a BF client). Use "Change Delivered Category" to change her category from BF to PP. Then change it back to BF again. Notice how the information on this window changes based on the risks and category of the selected client.
- Retrieve the record of Carol Cabbage (a BF client). Notice that she is more than 6 months since her delivery date. Open "Change Delivered Category". Can you change her category to PP?

Answer: No – This information is displayed. Terminate Carol as a non-breastfeeding mother 6 or more months past delivery.

**The client is not eligible as PP because at least 6 months have passed since delivery.**

[Go to Terminate WIC Client](#)

# The End