

Change Client Information

(Create New Group, Switch Group, Change Location, Correct Anthropometric Measurements, Correct Blood Measurements, Change Birth Date, Change Due Date, Change Pregnancy End Date)

This module applies to the following security roles:

Clerk
RN/RD



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

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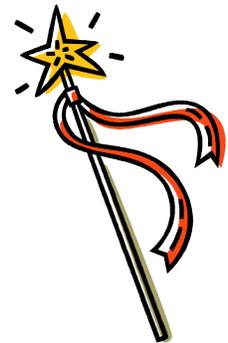
Objectives

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

1. Create a new client group
2. Switch a client to a different group
3. Change a client's location within a WIC Staffing Group.
4. Correct a client's anthropometric measurements
5. Correct a client's hematological measurements
6. Change a client's birth date
7. Change a pregnant client's due date
8. Change a client's pregnancy end date

Introduction

Remember the **“Cinderella Rule”**! That rule is: Most information entered today can be changed today, however, tomorrow the information will display as read-only. Data magically becomes permanent at the stroke of midnight! This module includes the features in KWIC that allow you to change certain information at a later date after that information has become read-only.

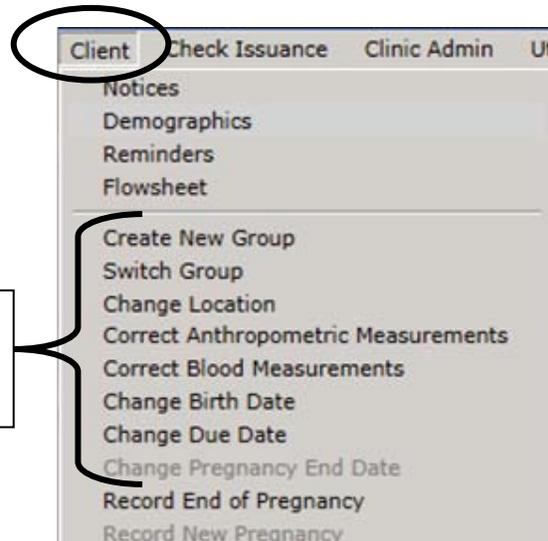


Most KWIC windows allow change at any time so do not have a special window to correct data (although the date will be different). For instance you can update the Health Interview tab at any time. If you are correcting information from a certification on a window such as this, you should make a note with a title like “Correction for cert” and explain that the correct information was added later.

Some KWIC windows will not allow change after midnight, nor is there a special “Correct” window – e.g., Notes. If you realize on a later date that you need to edit a note, you cannot change it. Instead you need to make a new note for your additions or corrections. You might title such a note “Correction to... (the original note's title)”.

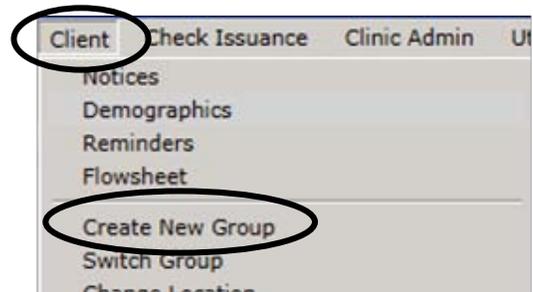
Use the **Client drop-down menu** to access the windows described in this module.

These KWIC features are presented in this



Create New Group

In the Apply for WIC module you briefly learned about using Create New Group window when a new family applies for WIC. Now you will learn to use the Create New Group window to remove one member from their existing group and to create a new group for this member.



You never want to enter a duplicate client so before you use “Create New Group”, be sure that the “new group” is not already in the system in Kansas. Search - and be sure to ask if the client was ever enrolled in Kansas with a different last name, or if a child, with a different caregiver’s name. If they were elsewhere in Kansas, transfer them to your clinic instead of creating a new group.

For example use the Create New Client Group function in the following situation: Angelina Asparagus, a breastfeeding mom, is a client at your clinic. Her infant Anna, and her child Arthur, are also clients. Arthur is moving in with his father Andy, who will bring him to his WIC appointments. The Create New Group function is used to remove Arthur from Angelina’s group and make him a group of his own, with his father as the Caregiver.

To Create A New Group for a Client:

1. Use **Find Client** to locate the child Arthur Asparagus and retrieve his record.
2. Select **Create New Group** from the Client menu.

- The Create New Group window opens. This window is like the Demographics tab except the bottom portion is labeled “New Family Information”.
- Update the Demographics tab with the new Caregiver's name (Andy Asparagus) and other appropriate information to complete the window. Save.

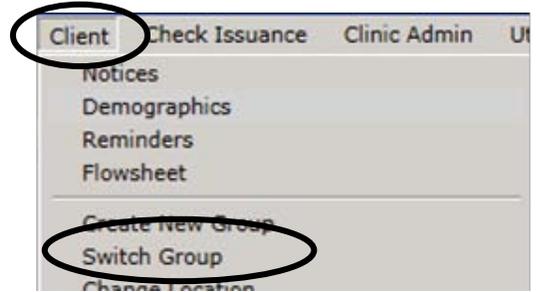
- Go back to Find Client. Clear search for Caregiver last name of Asparagus. Notice that he is now in a different group (Caregiver Andy Asparagus).

Caregiver	Client	DOB	Program	Status	Cat	El
Asparagus, Andy	Asparagus, Arthur	07/23/2009	WIC	Active	C	10
Asparagus, Angelina	Asparagus, Angelina	01/20/1982	WIC	Active	BF	02
	Asparagus, Anna	02/01/2013	WIC	Active	I	02

 **Note:** After creating a new client group, you need to redetermine income for both family groups (the new group and the old group). The new group needs income to be reassessed because you have no income information for this caregiver. The old group needs reassessed because the number in the family has decreased. Use the Income Eligibility window that you learned about in the Certification Guides module.

Switch Groups

The Switch Groups window is used to move a member of the selected group to another group **in your clinic**. For example use the Switch Groups function when a foster child moves from the foster home to a relative's home and both families are on WIC at your clinic.



Switching A Client From One Group To Another:

1. *(Just read these steps – there is no client example.)* Use Find Client to locate the client that is switching groups and retrieve the client's record.
2. Select Switch Group from the Client menu. The Switch Group window opens. It looks like the Find Client window.

 A screenshot of the 'Switch Groups' window. It features search fields for Caregiver Last Name, Client Last Name, Client ID, Local ID, First Name, and DOB. There are 'Clear' and 'Find' buttons. A table with columns: Caregiver, Client, DOB, Program, Status, Cat, Eligibility Ends, and Clinic is visible. Below the table is a red-bordered box containing the text 'Select a group to switch the client into.' and 'Save' and 'Cancel' buttons.

3. Search for the group to which the client is moving.
4. From the list of Caregivers/Groups displayed, click on the group to which the client is switching. This highlights the row in the display box. Click the **[Save]** button. The client is moved from their former group to the selected group.
5. If you go back to Find Client, clear and search for the same client, you'll see that the client is now in the different group.



Note: Income will need to be redetermined for the “old” group because the number in the family has decreased.

Skill Builder

Create New Client Group



Use Find Client to retrieve the record of child, Lisa Lettuce. Separate her from her current group using Create New Group. Use the following information for Lisa's new group:

- Lisa will be living with her grandmother, Polly Prune, who will also be her new Caregiver. Polly has never been on WIC in Kansas or the caregiver of an infant/child so there is no existing record for her.
- As you create a new group, enter appropriate address and phone number information for your clinic area for Polly Prune.

When you are done, close the record. Then use Find Client to search for client Lisa Lettuce. Who is the caregiver? If it is Polly Prune, you did this skill builder correctly.

(For this Skill Builder, you are just creating a new group. If you were doing this in clinic, you would need to assess income in Lisa's "old" group as well as the "new" group.)

Skill Builder

Switch Groups



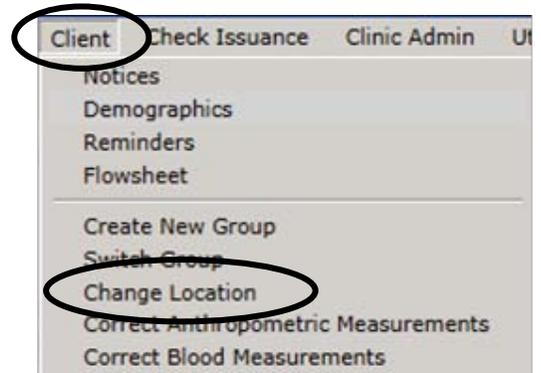
Use Find Client to find and retrieve Patsy Pea's record. Use the Switch Group window to switch him to the group in which Carla Carrot is the Caregiver.

When you are done, close the record. Then use Find Client to search for client Patsy Pea. Who is the caregiver? If it is Carla Carrot, you did this skill builder correctly.

(For this Skill Builder, you are just switching groups. If you were doing this in clinic, you would need to assess income in Patsy's "old" group.)

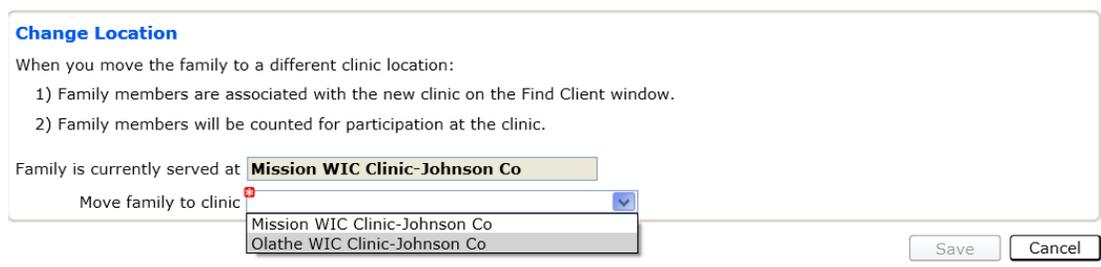
Change Location

The Change Location window is used to change a client group's service location between certain clinics in the same agency, for example, permanent to and from mobile; Johnson/Mission to and from Johnson/Olathe. This is only used instead of Transfer for a limited number of clinics with special relationships created in KWIC.



To Change the Location for a Client:

1. *(Just read these steps – there is no client example.)* Use Find Client to locate the desired client and retrieve the record.
2. Select Change Location from the Client menu.
3. The Change Location window opens. Read the screen information. Notice that the family group's current service location displays in a read-only display box.
4. Select a new service location using the "Move family to clinic" box.



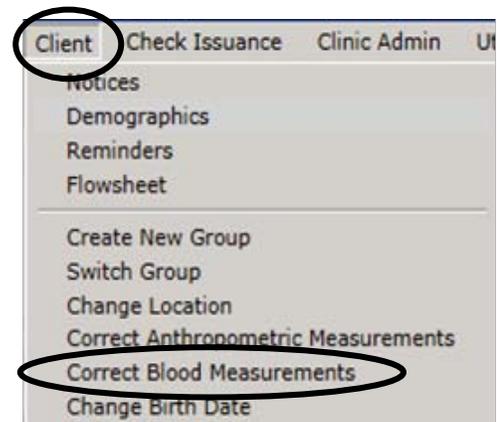
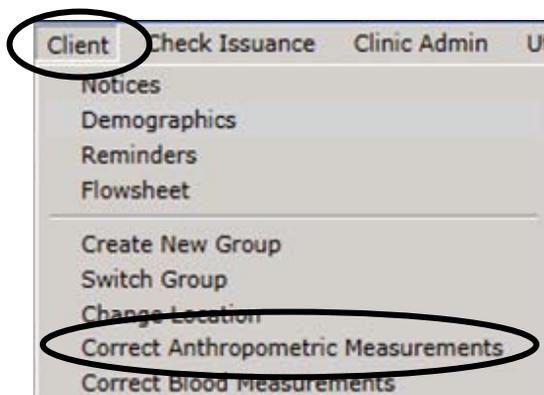
5. Click the **[Save]** button. The client is moved from their former location to the new clinic location.

Note: The remaining KWIC screens require RN or RD security clearance because a change might affect risk factors and certification. In the KWIC On-line Training Environment, there is no security limitation so all staff will be able to learn about the screens.

Correct Anthropometric Measurements and Correct Blood Measurements

The Correct Anthropometric Measurements and Correct Blood Measurements windows both have the same function so they are presented together here. Only screen shots for Correct Anthropometric Measurements are shown.

Both are used to correct measurements entered on a **date prior to the current date**.



- Use the regular Anthropometric Measurements or Blood Measurements windows to add or delete measurements entered on the **current date or to add measures taken on a past date**.
- There really is no use for the Add or Delete buttons on the Correct Anthropometric Measurements or Correct Blood Measurements windows. If you are adding a new measure, you should just use the **Anthropometric Measurements** window and not use the **Add** button on the Correct Anthropometric Measurements window. If the measurement date is taken on a date other than today, you can simply change the date in the Anthropometric Measurements window as you make the entry. (Same for blood measures.)
- Do not use the Delete button the Correct Anthropometric Measurements window to delete an error. Instead correct as previously described. It is important that there be a record that a correction was made so the “whole story” is in the record. (Same for blood measures.)



Let's look at Correct Anthropometric Measurements for a Client.

1. Find the client Amanda Apricot, and retrieve her record.
2. Select **Correct Anthropometric Measurements** from the Client menu.

Amanda Apricot WIC Active PG
 10356388 Gender Female Cert. Period 01/23/2013 to 09/30/2013
 DOB 02/22/1989, 24 Years Priority 1 HR

Correct Anthropometric Measures Amanda

Pregnancy Measures
 Pre-Pregnancy Weight 128 BMI 25.9

Date	Height		Weight		BMI	Note
	Inches	. 8ths	Pounds	. Ounces		
03/04/2013	59	0	127	4	25.7	
01/23/2013	58	2	124	0	25.7	
09/30/2009	58	0	104	12	21.9	
05/03/2009	58	0	104	0	21.7	measured per dietitian
02/10/2009	58	5	97	0	19.8	

3. The Correct Anthropometric Measurements window opens. A display box lists all the client's measurements.
4. To correct a measure – Highlight (click on) the row with the error. This makes the details of that entry display in editable fields below the display box. Correct as needed. (In this case, change Amanda's weight from 127 lb 4 oz to 137 4 oz.)

Amanda Apricot WIC Active PG
 10356388 Gender Female Cert. Period 01/23/2013 to 09/30/2013 Due Date 08/01/2013
 DOB 02/22/1989, 24 Years Priority 1 HR

Correct Anthropometric Measures Amanda

Pregnancy Measures
 Pre-Pregnancy Weight 128 BMI 25.9

Measures [Display and Print Growth Charts](#)

Date	Height Inches	. 8ths	Weight Pounds	. Ounces	BMI	Note
03/04/2013	59	0	17	4	3.5	entry error
01/23/2013	58	2	124	0	25.7	
09/30/2009	58	0	104	12	21.9	
05/03/2009	58	0	104	0	21.7	measured per dietitian
02/10/2009	58	5	97	0	19.8	

Measurement Date 03/04/2013

Height: 59 Inches 0 8ths Weight: 17 Pounds 4 Ounces

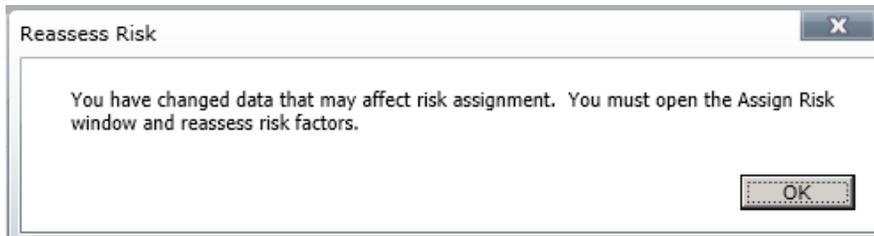
Note entry error

Created 03/04/2013 03:43 PM by Darcy Thompson at Butler County WIC Clinic

Save Cancel

5. Make a note in the Note field to explain the change, such as "data entry error".

6. Save. This reminder message will display. It is important that you reassess risk after you correct measures. Such a change might cause a risk factor to be no longer assigned, or now there is a new risk factor.



7. Click **OK**, then click [**Cancel**] to close the window. (And don't forget to reassess risk!)

Automatic Note

Saving this window creates an automatic note in the Notes window. To read the note, go to the client's Notes window and click on the title "Correct Anthropometric Measurements" in the list of notes in the upper section of the window. The note will display in the lower section, showing the original data and new data.

This automatic note functionality occurs with all the remaining correction and changes screens shown in this module.

Amanda Apricot **WIC Active PG**
 10356388 Gender Female Cert. Period 01/23/2013 to 09/30/2013 Due Date 08/01/2013
 DOB 02/22/1989, 24 Years Priority 1 HR

Notes Amanda Notices Amanda

Date	Author	Title
08/13/2013	01 Train	Correct Anthropometric Measurements
07/09/2013	Sally Smith	BFPC
06/12/2013	Sally Smith	BFPC
03/04/2013	Darcy Thompson	PG/RD
01/23/2013	Sally Smith	BFPC
01/23/2013	Darcy Thompson	PG/NC
01/23/2013	Darcy Thompson	Tailored Food Package
01/23/2013	Darcy Thompson	Due Date Changed
01/23/2013	Sunny Hayes	HC
01/23/2013	Cindy Jones	HW 19 - Yes
02/04/2010	Cindy Jones	Termination From WIC
02/03/2010	Darcy Thompson	Tailored Food Package
02/02/2010	Darcy Thompson	PG/NC - 1st study

Title: **Correct Anthropometric Measurements**

Note:
 The following measurement change(s) were made by 01 Train on 8/13/2013 5:21:56 PM.
 The weight was changed from 127 lb 4 oz to 17 lb 4 oz for the measurement date of 03/04/2013.



Skill Builder

Correct Anthropometric Measurements & Correct Blood Measurements

1. Use the Correct Anthropometric Measurements window to correct Patsy Pea's height by adding $\frac{3}{8}$ of an inch. (Reason – data entry error.)
 - a. Reassess Patsy's risk.
 - b. Look at Patsy's Notes and read the auto-generated note.

2. Use the Correct Blood Measurements window to correct Amanda Apricot's hemoglobin to 10.1. (Reason – data entry error.)
 - a. Reassess Amanda's risk.
 - b. Look at Amanda's Notes and read the auto-generated note.

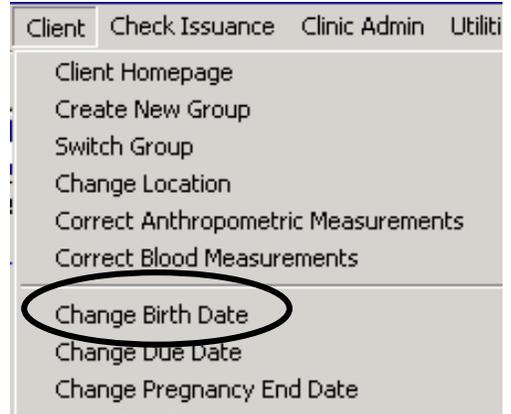
Change Birth Date

The Change Birth Date window is used to change a client’s Date of Birth (DOB) that was entered incorrectly, whether entered today or in the past. (The Cinderella rule does not apply.)



For infants and children changing the birth date might:

- adjust the Eligibility End Date,
- require you to change risk factors, and
- require you to change in food package assignment.



Changing the Birth Date for a Client:

1. Retrieve the record of client Russell Rutabaga.
2. Select Change Birth Date from the Client menu.
3. The Change Birth Date window opens.

Russell Rutabaga **WIC Active C**
10358080 Gender Male Cert. Period 08/04/2013 to 02/28/2014
DOB 02/04/2012, 1 Years 7 Months Priority 5

Change Birth Date [x] Notices [x]
Russell Russell

Change Birth Date

Current Birth Date 02/04/2012 Eligibility Begin 08/04/2013 Eligibility End 02/28/2014
New Birth Date * 00/00/0000 New Eligibility End 00/00/0000

Reason for Change of Birth Date

4. All fields display current information and are read-only except the two required fields marked with a red asterisk – New Birth Date and Reason. Three fields display only for infants and children - Eligibility Begin, Eligibility End, and New Eligibility End
5. Enter the client’s correct DOB in the New Birth Date field. Change the DOB of Russell Rutabaga to make him one month younger.
6. Enter a reason such as “data entry error”.
7. Save. As you’ve seen previously, a “Reassess Risk” reminder message will display. Click **OK**, and close the window. (And don’t forget to reassess risk!)

Automatic Note

As with other KWIC features previously described, saving this window creates an automatic note in the Notes window. To read the note, go to the client's Notes window and click on the title "Change Birth Date". The note includes the original data, new data, and reason.

Additional Rules related to Changing Date of Birth

PG, BF, and PP:

- The DOB can be changed at anytime.
- The new DOB may not make the woman less than 8 years old.
- A reason for change the DOB must be entered.

Infants:

- If the client is Active, the date cannot make the infant more than 12 months old.
- If the client is Active, and the new DOB would have made the client less than 6 months old on their date of certification, the new Eligibility End Date will be the last day of the month in which their first birthday falls.
- If the DOB would have made the client more than 6 months old and less than 12 months old on the certification date, the new Eligibility End Date will be the last day of the month 6 months after the certification date.
- If the client is not Active, and the new DOB makes the client >1 year old, their most recent WIC application category is changed to Child.

Children:

- If the client is Active, the DOB entered cannot make the child less than 12 months old.
- If the client is Active and the new DOB makes them >12 months and <5 years, the Eligibility End Date is not adjusted. The Eligibility End Date will still be the last day of the month 6 months after their certification date.
- The client is Terminated if they are Active and the new date makes them 5+ years old.
- If the client is Active, and their new Eligibility End Date extends past the last day of their 5th year, the Eligibility period is shortened to the last day of the month in which their 5th birthday falls.
- If the client is not Active and the new DOB makes the client 1+ years old, their most recent WIC application category is changed to "C."

Change Due Date

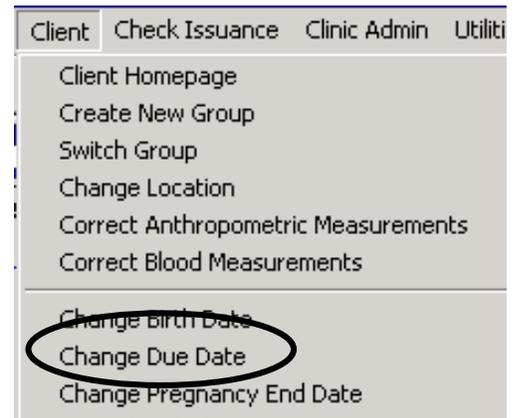
The Change Due Date window is used to change a pregnant woman’s Due Date after the certification has been completed. The client must be Pregnant and have a status of Active, Presumed or Expired to access this window.



Note: Depending on the circumstances, you might need to tactfully confirm with the client that this is the same pregnancy. If the client experienced a miscarriage, you need to use Record End of Pregnancy, and Record New Pregnancy. Then you need to certify the woman again, with information appropriate for the new, current pregnancy.

Changing the Due Date for a Client:

1. Retrieve the record of Carol Cucumber.
2. Select Change Due Date from the Client menu.
3. The Change Due Date window opens. A series of read-only and editable fields are used to change the Due Date.



Carol Cucumber		WIC Active PG	
10358712	Gender Female	Cert. Period 07/19/2013 to 11/30/2013	Due Date 10/19/2013
DOB 07/04/1991, 22 Years		Priority 1	
«	Change Due Date ☒	Notices ☒	»
	Carol	Carol	

Change Due Date

Enter a New Due Date. Eligibility dates will be automatically calculated.
Please enter narrative to explain the reason for the change.

Current Due Date New Due Date

Original Due Date

WIC Eligibility Begin Date New WIC Eligibility Begin Date

WIC Eligibility End Date New WIC Eligibility End Date

Reason for Change

4. All fields display current information and are read-only except the two required fields marked with a red asterisk – New Due Date and Reason.
5. Enter the client’s new due date in the New Due Date field. Change the due date for Carol Cucumber to be 2 weeks later.
6. Enter a reason such as “sonogram by doctor”.

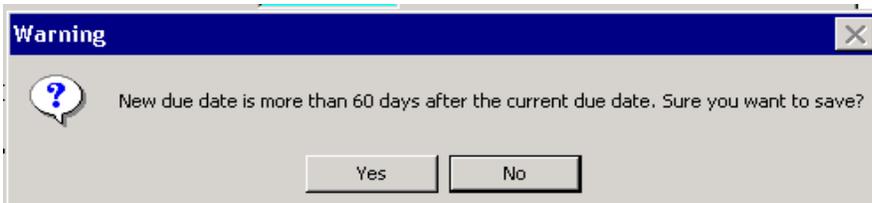
7. **[Recalculate Eligibility Dates]** is then enabled. Click it. There will be a warning message that doing this will change the Eligibility End Date. Click OK and go on. KWIC will change the due date and automatically calculate a new eligibility end date.



- a. **New WIC Eligibility Begin Date**– the Eligibility Begin Date is displayed as a reference but does not change.
 - b. **New WIC Eligibility End Date** – the new Eligibility End Date that is recalculated after **[Recalculate Eligibility Dates]** is clicked.
8. Save. As you've seen previously, a "Reassess Risk" reminder message will display. Click **OK**, and close the window. (And don't forget to reassess risk!)

Automatic Note

As with other KWIC features previously described, saving this window creates an automatic note in the Notes window. To read the note, go to the client's Notes window and click on the title "Due Date Changed". The note includes the original data, new data, reason, and the new Eligibility End date.



It is unlikely that you will be changing the due date over 60 days. If you try to do so, you will receive a warning message

shown below. *Confirm that you are trying to enter the correct date before proceeding. This might also be a clue to ask if this is the same pregnancy or if there was a miscarriage. Do not simply change the due date if there was a miscarriage (as mentioned previously.)*

Skill Builder Change Due Date



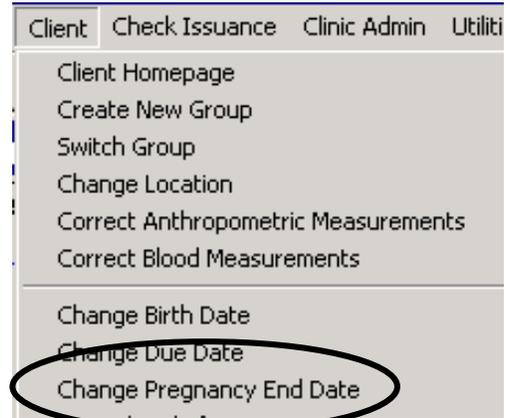
Change Lisa Lemon's Due Date. Make it 3 weeks later with a reason "from doctor – other date was just Lisa's guess". After saving the Change Due Date window, look at her Notes window and read the auto-generated note.

Change Pregnancy End Date

The Change Pregnancy End Date window is used to change a breastfeeding or postpartum woman’s Pregnancy End Date after the certification has been completed. For example this window might be needed if a wrong delivery date was entered when the mom was certified. The infant’s date of birth might also need changing.

Changing the Pregnancy End Date for a Client:

1. Retrieve the record for client Susie Squash.
2. Select Change Pregnancy End Date from the Client menu.
3. The Change Pregnancy End Date window opens. A series of read-only and editable fields are used to change the date.

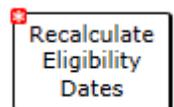


The screenshot shows the 'Change Pregnancy End Date' window for client Susie Squash. At the top, client information is displayed: Susie Squash, WIC Active BF, 1069767, Gender Female, Cert. Period 05/17/2013 to 04/30/2014, Priority 1, and Delivery Date 04/27/2013. Below this, there are tabs for 'Change Pregnancy End Date' (selected) and 'Notices'. The main area contains the following fields:

- Current Pregnancy End Date: 04/27/2013
- New Pregnancy End Date: 04/27/2013 (marked with a red asterisk)
- Original Pregnancy End Date: 04/27/2013
- WIC Eligibility Begin Date: 05/17/2013
- New WIC Eligibility Begin Date: 00/00/0000
- WIC Eligibility End Date: 04/30/2014
- New WIC Eligibility End Date: 00/00/0000

At the bottom, there is a 'Reason for Change' field (marked with a red asterisk) and a 'Recalculate Eligibility Dates' button.

4. All fields display current information and are read-only except the two required fields marked with a red asterisk – New Pregnancy End Date and Reason. New Pregnancy End Date defaults to the existing date.
5. Correct the client’s pregnancy end date using the New Pregnancy End Date field. Change the due date for Susie Squash to be 1 day later.
6. Enter a reason such as “data entry error”.
7. The [Recalculate Eligibility Dates] button is then enabled and required. Click it. There will be a warning message that doing this will change the Eligibility End Date. Click OK and go on. KWIC will change the due date and automatically calculate a new eligibility end date.

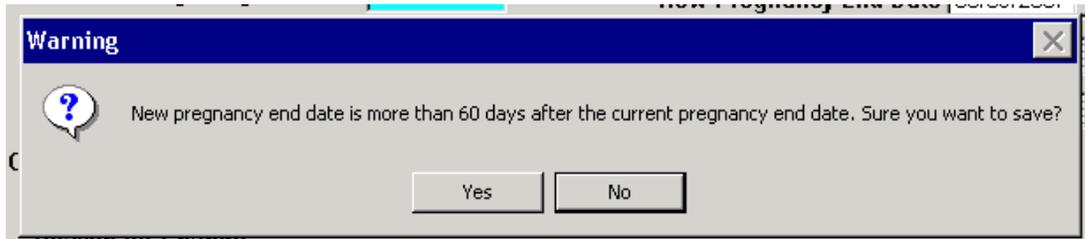


- c. **New WIC Eligibility Begin Date**– the Eligibility Begin Date is displayed as a reference but does not change.
 - d. **New WIC Eligibility End Date** – the new Eligibility End Date that is recalculated after [**Recalculate Eligibility Dates**] is clicked.
9. Save. As you’ve seen previously, a “Reassess Risk” reminder message will display. Click **OK**, and close the window. (And don’t forget to reassess risk!)

Automatic Note

As with other KWIC features previously described, saving this window creates an automatic note in the Notes window. To read the note, go to the client’s Notes window and click on the title “Pregnancy End Date Changed”. The note includes the original data, new data, and reason.

It is unlikely that you will be changing the date more than 60 days. If you try to do so, you will receive a warning message shown below. Confirm that you are trying to enter the correct date before proceeding. You will get a similar message if you try to change the date to more than 60 days in the past.



Don’t forget to check the infant’s record and confirm whether or not the date of birth is correct. If it is wrong, use the Change Birth Date window presented earlier in this module.

Skill Builder



You just changed Susie Squash’s End of Pregnancy Date. Her infant is Samantha Squash. Change Samantha’s date of birth to match her mother’s new delivery date.

The End