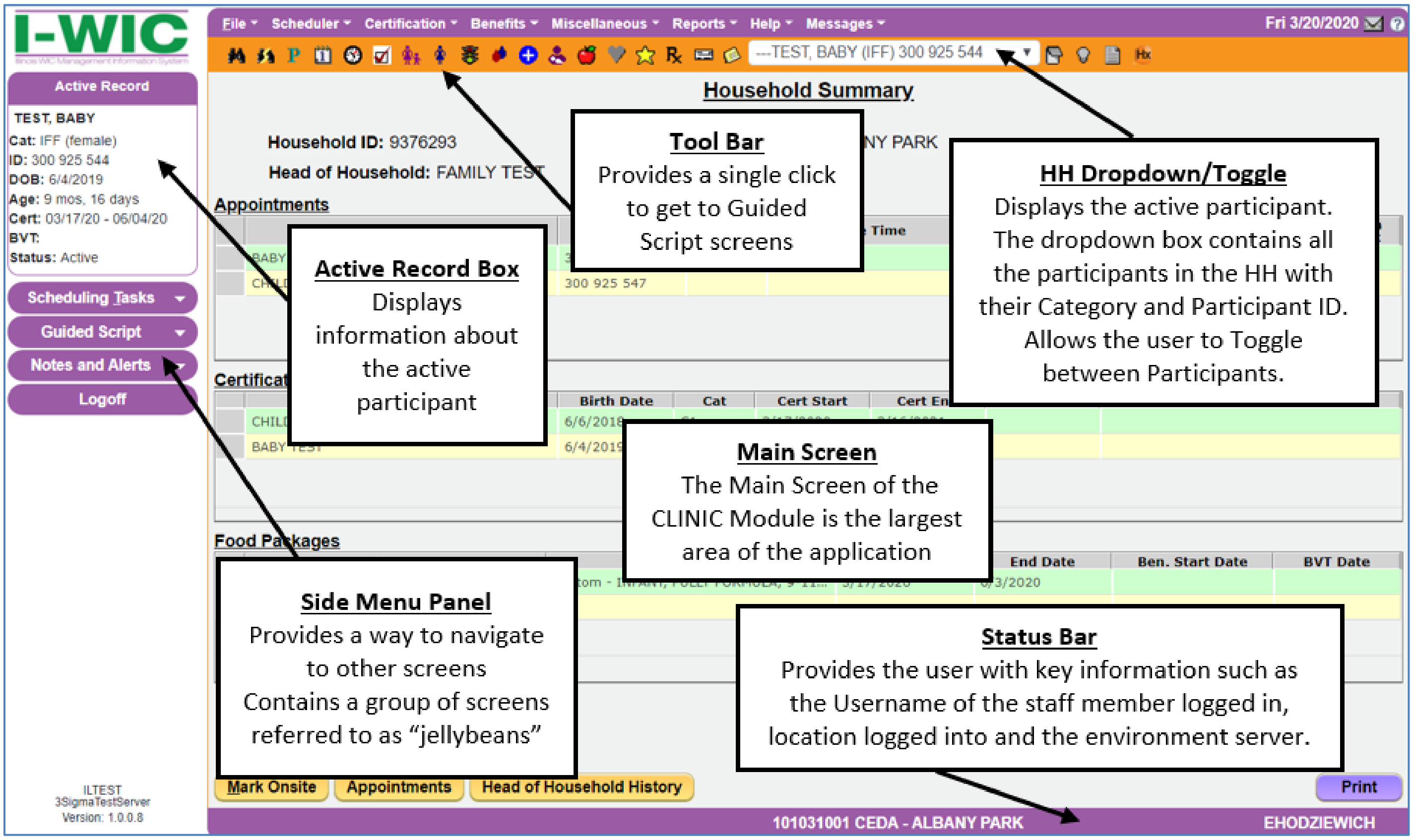
I-WIC Training Resource – Clinic

Scenario 1: Introduction to I-WIC

Screen Basics

To login to the IWIC system you will need access to an internet browser, Chrome or Edge. Specific instruction of where and how to log in will be provided to you separately. Sometimes files in the cache get corrupted and can cause problems with your browser. So, it's a good habit to Clear the Cache on a regular basis. *Refer to I-WIC: Clear Cache*

This is the I-WIC system home page, on the left side of the screen, there are 6 modules available. Clinic, Admin, Nutrition, Vendor, Finance and Scheduler. Most WIC staff will only have access to the Clinic module. The Scheduler module is rarely used, and limited to agencies when WIC appointment scheduling is completed through an agency call center.



There are 7 key areas common to each main screen that we will review. Menu Bar, Tool Bar, Active Record Box, Toggle Box, Side Menu Panel, Status Bar, and the Main Screen Area which is the large area that takes up most of the screen. This is where all participant and household data are entered and/or viewed.

The File Menu Bar at the top of the screen contains expandable dropdown menus that can be used to navigate to a desired screen. Your access to each of these screens will depend on your role in the clinic. Review the dropdowns, including today's date and the screen navigation icons (envelope and ?)

Figure 9 – File Menu Bar

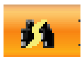
4.4.1 Screen Navigation Icons

Messages (Envelope icon) – The **Messages** icon appears red when a new message exists for the logged in staff member. Clicking this icon allows the **Message Board** pop-up window to display.

Help Files (Question Mark Icon) – The Help Files icon directs users to the Help Files for the Clinic Module.

The tool bar contains icons that can take you to frequently used screens. **Click** the binoculars, this will exit an existing record and take you to the search screen. The binoculars with the lightning bolt, called "quick search" takes you to the Search Pop-up (**Click this icon**). The History drop down at the bottom of the pop-up will show the last 5 participants you worked with. **Select** the last participant. Most of these icons are only accessible if you have opened a participant record. **Hover over the remaining icons and describe each**.

Search (Binoculars Icon) – takes the user to the **Search** screen.



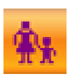
Quick Search (Binoculars Icon) – takes the user to the **Search** screen Pop-up.

Precertification (P) – displays the **Precertification** screen.

Daily Schedule (Scheduling Calendar Icon) –takes the user to the **Daily Schedule** screen, which displays an appointment book-type view of the day's appointments.

Schedule Appt (Clock Icon) –displays the **Schedule Appt** screen.

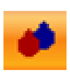
On-Site (The Checked Box Icon) –displays the **On-Site List** screen.



Household Information (Two-person icon) –takes the user to the **Household Information** screen, where the user enters data specific to the household.

Participant Information (Single-person Icon) –takes the user to the **Participant Information** screen, where the user enters data specific to the participant within the household.

Cert Action (Green Light Icon) –takes the user to the **Cert Action** screen, where they are able to establish a Certification period for a participant.

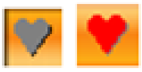


Lab (Blue & Red Droplets Icon) –takes the user to the applicable **Lab** screen for the selected participant's category. Blood work, immunization, and anthropometric data is entered here.

Health Information (Cross in Blue Circle Icon) –takes the user to the **Health Information** screen respective of the category of the selected participant.

Breastfeeding Information (Mother and Infant Icon) –takes the user to the **Breastfeeding** screen, where the user enters breastfeeding support data and issue a breast pump.

Nutrition Information (Apple Icon) –takes the user to the **Nutrition** screen. The questions displayed will be based on the category of the selected participant.



Nutrition Risk (Heart Icon) –displays the **Nutrition Risk** screen, where nutritional risk factors can be automatically or manually assigned. The icon is gray and will appear illuminated (red) when the selected participant has been found to be at a high nutritional risk and in need of additional nutrition care counseling.

Nutrition Education (Star Icon) –displays the **Nutrition Education** screen, where the user can enter in any information pertaining to a specific Nutrition Education topic that was discussed with the participant and/or household.

Food Prescription (Prescription Icon) –takes the user to the **Food Prescription** screen for the selected participant, where the user can assign a food package.

Issue Benefits (eWIC Card Icon) –takes the user to the **Issue Benefits** screen. If a Food Prescription has been assigned and all other eligibility requirements met, the user can issue benefits.

Print Documents (Yellow Document Icon) –takes the user to the **Print Documents** screen. The user has the option to print a selection of documents and handouts useful for WIC participants.

Participant History (HX Icon) –takes the user to the **Participant History** screen. The user has the option to view participant history for Health, Nutrition, Nutrition Education, and Lab information. For women categories, there is also a Pregnancy option.

The tool bar also contains the Toggle Box which displays the active participant. The dropdown box contains all participants in the HH with their category and Part ID and allows you to move between the participant records as data is collected. To the right of the Household Dropdown Box, is a group of indicator icons that appear illuminated whenever certain conditions exist. These alert indicators are used to quickly inform you that a particular participant or household needs special attention. They only illuminate when a value is present within the Participant or Household record. When an alert is not present, the icons appear gray. Clicking on the respective icon takes you to the appropriate screen or window.

Notes (Notebook icon) – The Notes icon appears red when the selected Participant record contains a note. Clicking this icon takes the user to the **Notes** screen.

Alerts (Light-bulb icon) – The Alerts icon appears yellow if the selected Participant has an active Alert. Clicking this icon takes the user to the **Alerts** screen.

Images (Document icon) – The Images icon appears white if there are documents that have been scanned and saved to the selected Participant's record.

The Active Record Box contains, at a glance, information and may be either the HH or the participant record. When a participant record is active, the box contains the participants name, category and gender, ID #, DOB, age, certification dates if they exist, the BVT date (benefits valid through), and the status of the participant. If the participant is a pregnant woman, the wks gestation is also shown. When the HH record is active, the active record box only displays the head of household name and ID#.

Navigation Button Overview

Nearly all I-WIC screens have one or more buttons to help you navigate or complete actions on the screen. The more common buttons are as follows:

Add – Allows the user to add a row to the associated grid.

Remove – Allows the user to remove a row from the associated grid. In many cases, this function is restricted by the 'same day rule' where a user can only remove data on the same day it was added.

Mark Onsite – This will mark the participant onsite for an appointment in the walk-in column on the Daily Schedule Screen.

New – Adds a new record to the system. In many cases, this will clear any data present on the screen and allow the user to enter new data.

Save – Saves the data entered and keeps the user on the screen.

Cancel – Cancels any action made and returns the user to the base screen – in most cases, this will be the **Household Summary** Screen. If a modification has been made to a screen and the user has not saved that modification, a reminder message will be displayed asking the user if they want to save or lose changes before exiting.

Next – Takes the user to the next screen in the logical process of certification. Clicking this button will save the data before advancing to the next screen or tab.

There are other buttons on other screens that will be discussed as we review those screens.

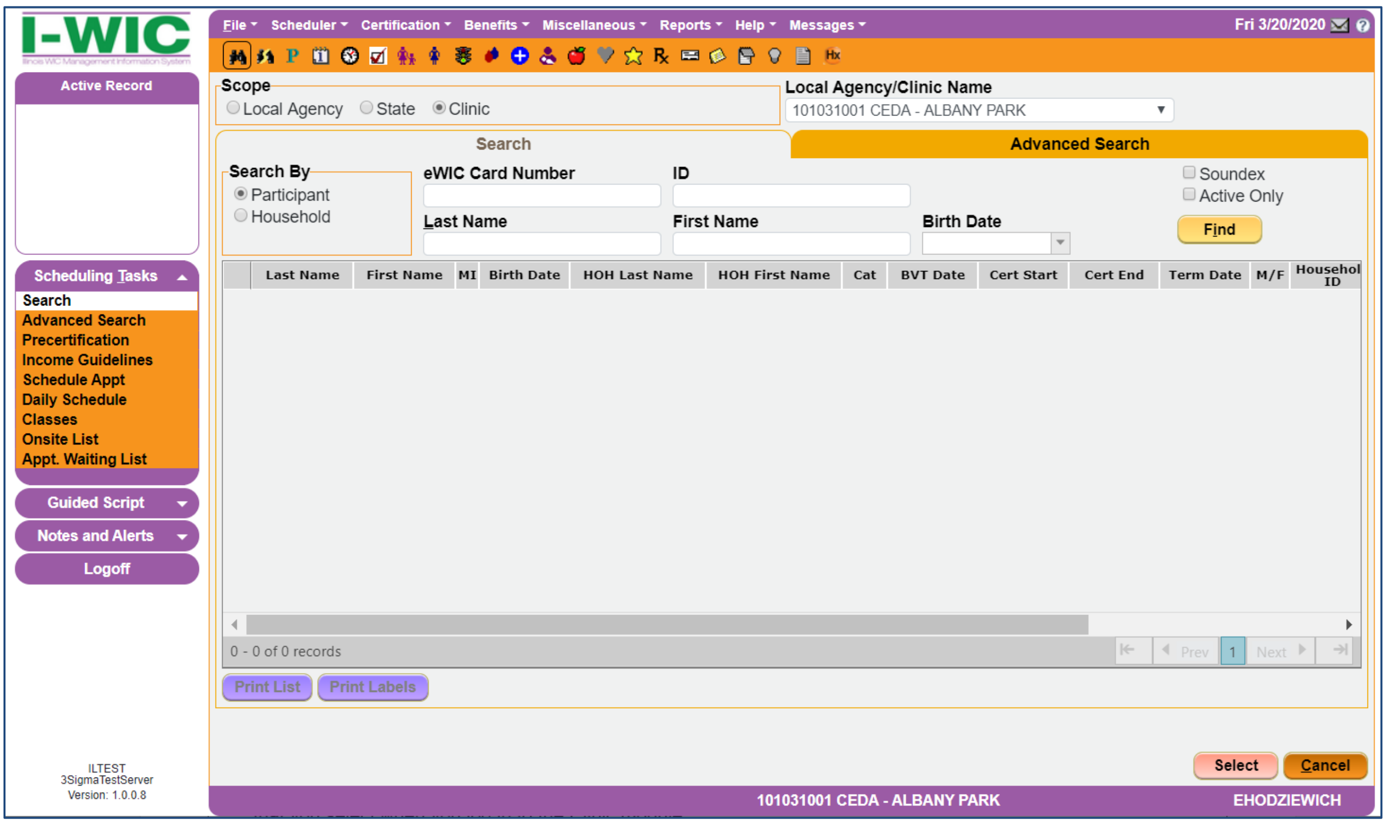
Scenario 2: Searching for and Opening Records

Review how to search for and open household and participant records.

Search Screens

The main Search tab is the default screen that opens when you first access the Clinic module. It allows you to do a search to locate and open records using the most common search parameters.

The Search screen is divided into 2 tabs – the main (default) **Search** tab and an **Advanced Search** tab.



The **Search** tab provides the most common search options to locate and open records. The **Advanced Search** tab provides a few additional search options.

1. The **Scope** section of both tabs allows you to indicate where you want to search. The **Scope** defaults to the level that you select when you log in to the Clinic module.
    a. ***Local agency*** allows you to search for a participant or household in any clinic within your local agency.
    b. ***State*** allows you to search for a participant or household in any local agency/clinic in the state.
    c. ***Clinic*** allows you to only search for a participant or household within the designated clinic.

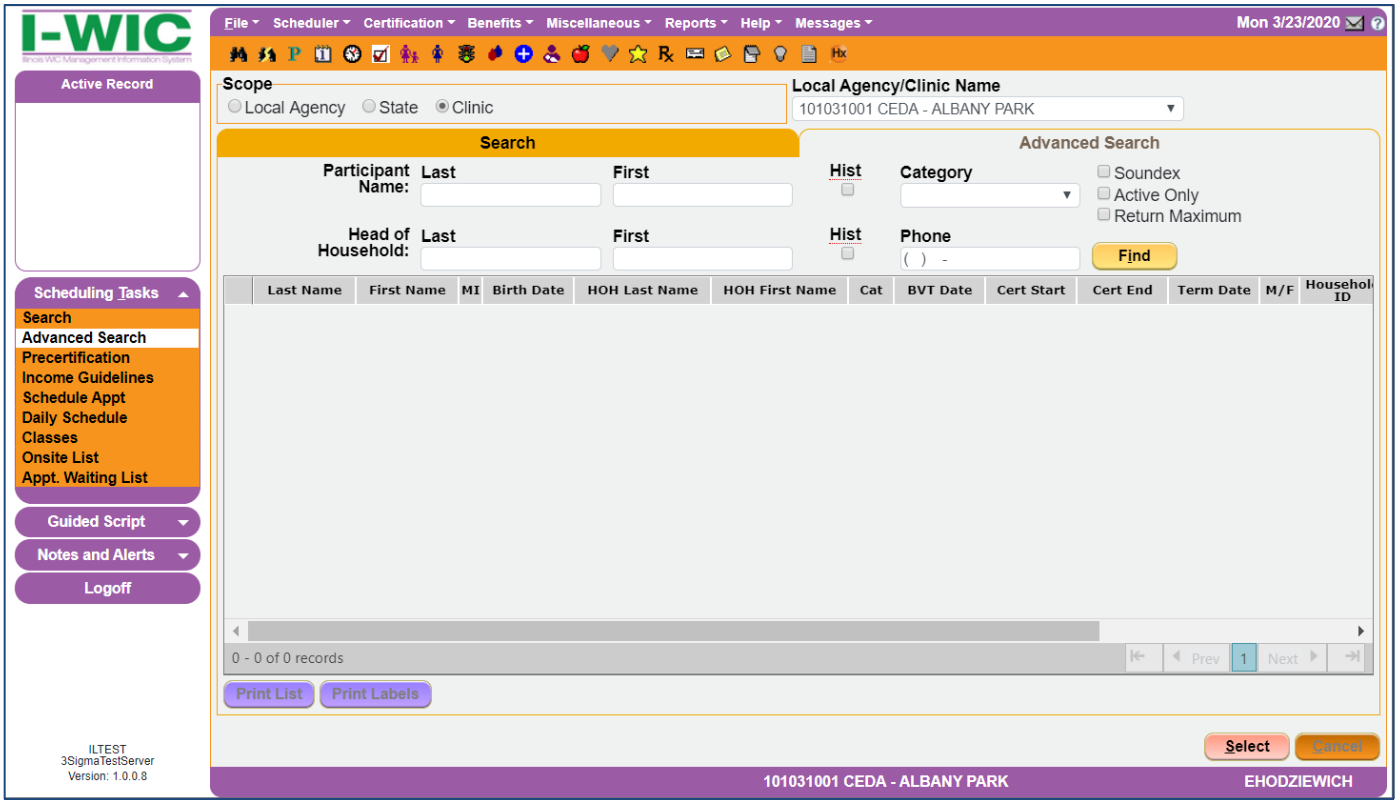
2. The **Search By** section of the main **Search** tab allows you to specify who you are searching for by a variety of information. If you select **Participant**, then the options relate to a specific participant. If you select **Household**, the options relate to a household.
    a. To search by **ID number**, you must enter a complete **ID** number.
    b. To search by **eWIC Card Number**, you must also enter a complete number. If your workstation has a card swipe device, click your mouse into the **eWIC Card Number field**, then swipe the

card. The system will automatically locate and open the appropriate household.

c. To search by **Last Name** or **First Name**, you can enter as much or as little of the names as you wish. You can enter only the last name (or parts of it) or enter only the first name (or parts of it) or enter both.

d. To search by **Birth date**, you must enter the complete birth date.

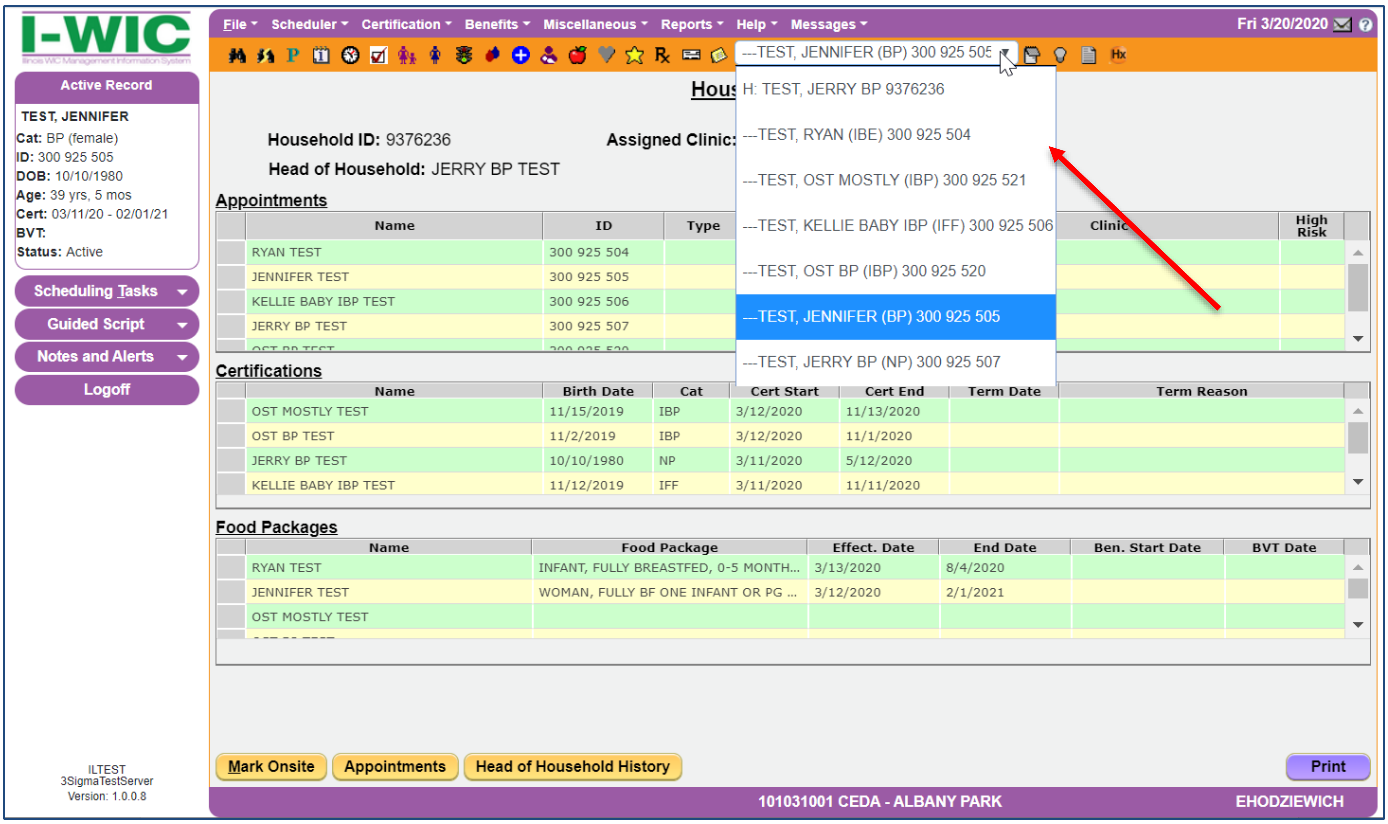
3. The additional options on the **Advanced Search** tab includes the **Participant Name**, **Head of Household Name**, **Category** and **Phone Number**.



Opening a Record

1. To open a record, you can either double-click on the row or select the row and click on the **Select**
2. button at the bottom of the screen to begin working with that record.

3. When the record is opened, the **Household Summary** screen displays. If the search was by **Participant**, the record will open at the participant level. If the search was by **Head of Household**, the record will open at the household level. You can tell which level you are at by looking at the **Selected Record** box or the toggle box on the toolbar.



4. The **Household Summary** screen displays some basic information about the household and is the first screen displayed when a record is opened. It is also the home screen whenever you click the **Cancel** button on any main screen within an open record.

5. The 3 grids on the Household Summary screen give an overview of the active and recent terminated participant (within the past 60 days) in the household.
   a. The **Appointments** grid lists the next appointment for each participant or applicant.
   b. The **Certifications** grid lists certification period information relating to each participant or applicant.
   c. The **Food Packages** grid lists details about food packages and benefits for each participant.

6. At the bottom of the **Household Summary** screen are several buttons. They are:
   a. **Appointments** – this button opens a popup that displays recent past appointments and all future appointments for the household. Appointments have a status column, so you can tell if an appointment was kept, missed, cancelled, moved, etc.
   b. **Head of Household History** – this button opens a Head of Household History screen that will

show the names of previous heads of households and proxies, if any.

c. **Print** – this button prints the information displayed on the Household Summary screen.

Scenario 3: Appointment Scheduling and Precertification

There are 2 screens that can be used to schedule appointments – the Schedule Appointment screen and the Daily Schedule screen. Appointments can also be scheduled using the separate *Scheduler* module.

The **Schedule Appointment** screen is where the system will search for and list all open slots within specified search parameters. Staff can then select from that list of open slots to set the appointment.

The **Daily Schedule** is where staff must manually search for and select the individual time slot to set the appointment one day at a time.

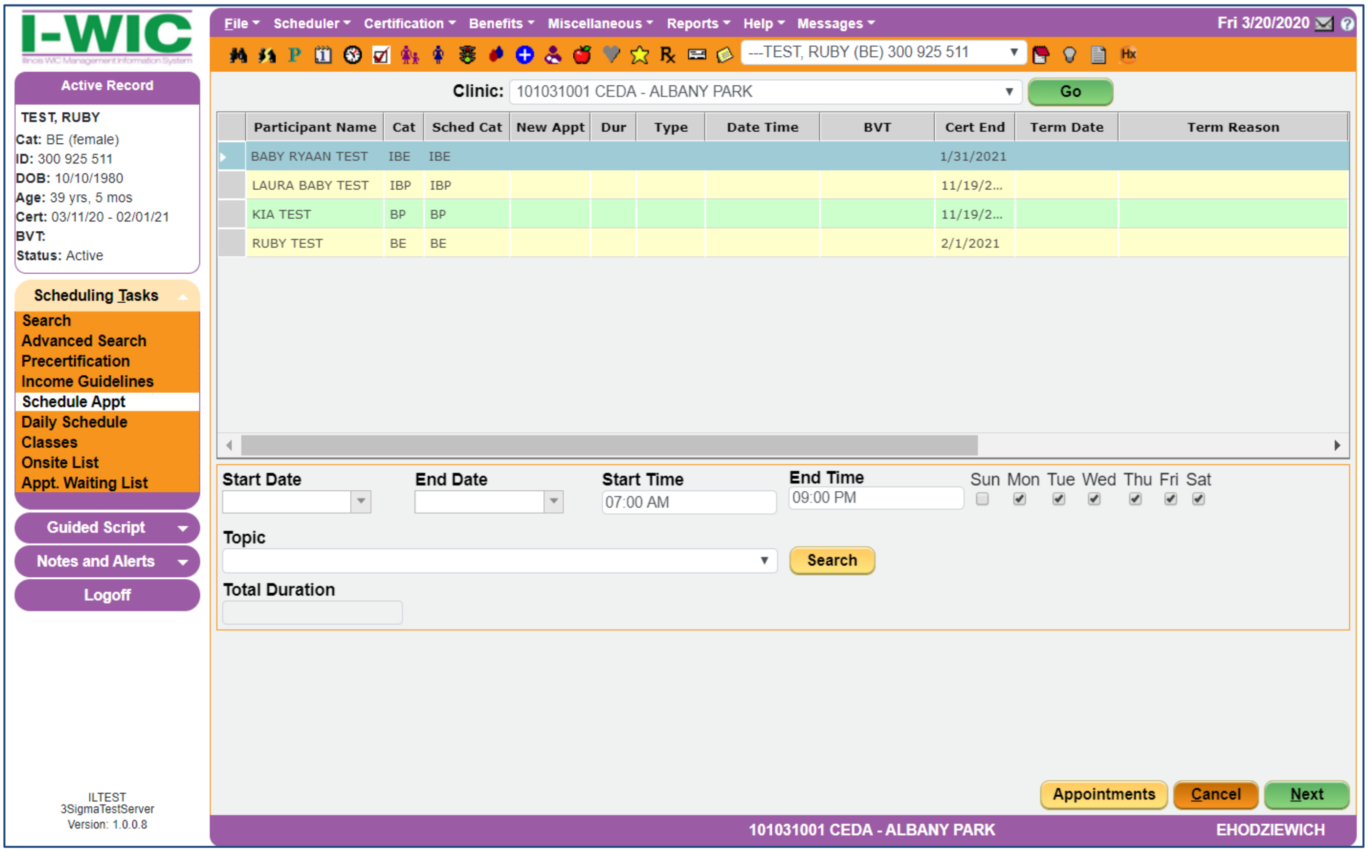
NOTE: Both screens require that you have a record open, either at the household level or the participant level, in order to make an appointment.

Creating an Appointment from the Schedule Appt Screen

The **Schedule Appointment** screen allows you to search for open appointment slots based on filtered criteria that you can specify. You must have a record open, either at the household level or a participant level. From this screen you can randomly search for and open available appointment slots.

NOTE: At the top of the screen, make sure that the correct clinic where the household wishes to receive services is selected.

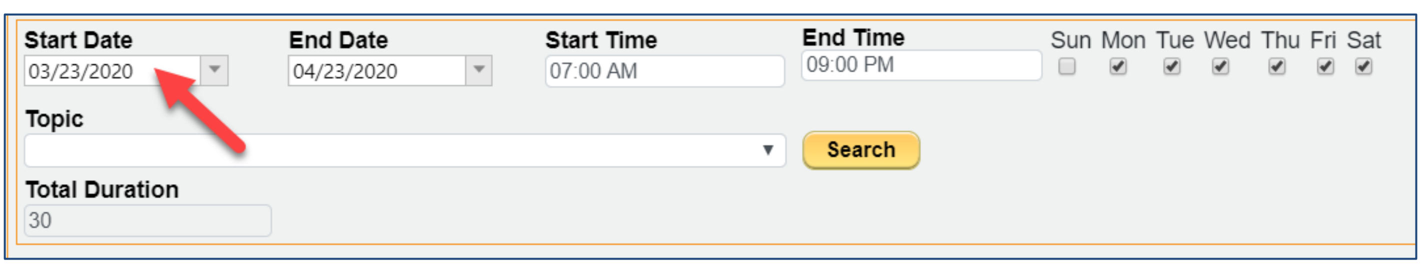
The **Schedule Appt** screen consists of a grid that includes each member of the household, so that you can schedule the entire household at once. Each applicant must have his/her own appointment, but the total time needed for all appointments is added together and the appointments appear as one block of time once scheduled.



The grid includes the following information, some of which will be blank for a new household. The columns that will be required for you to fill in are:

- **NEW APPT** - For a new household not previously on Illinois WIC, you would either select **CERT** or **PCERT**. The difference between the 2 appointment types is that a **PCERT is a Priority Certification** for those participants requiring an **Appointment within 10 days**. A **CERT is for a Non-Priority Certification** and an **Appointment must be made within 20 days**.
- **DUR** – This column represents the **Amount of time for the Appt Type selected**. When you select an appointment type, the system automatically defaults the duration **DUR based on the Type of Appointment** selected. However, you can manually adjust the duration of the appointment in 15-minute increments.

Below the grid is the section where you specify your search criteria for the appointment.



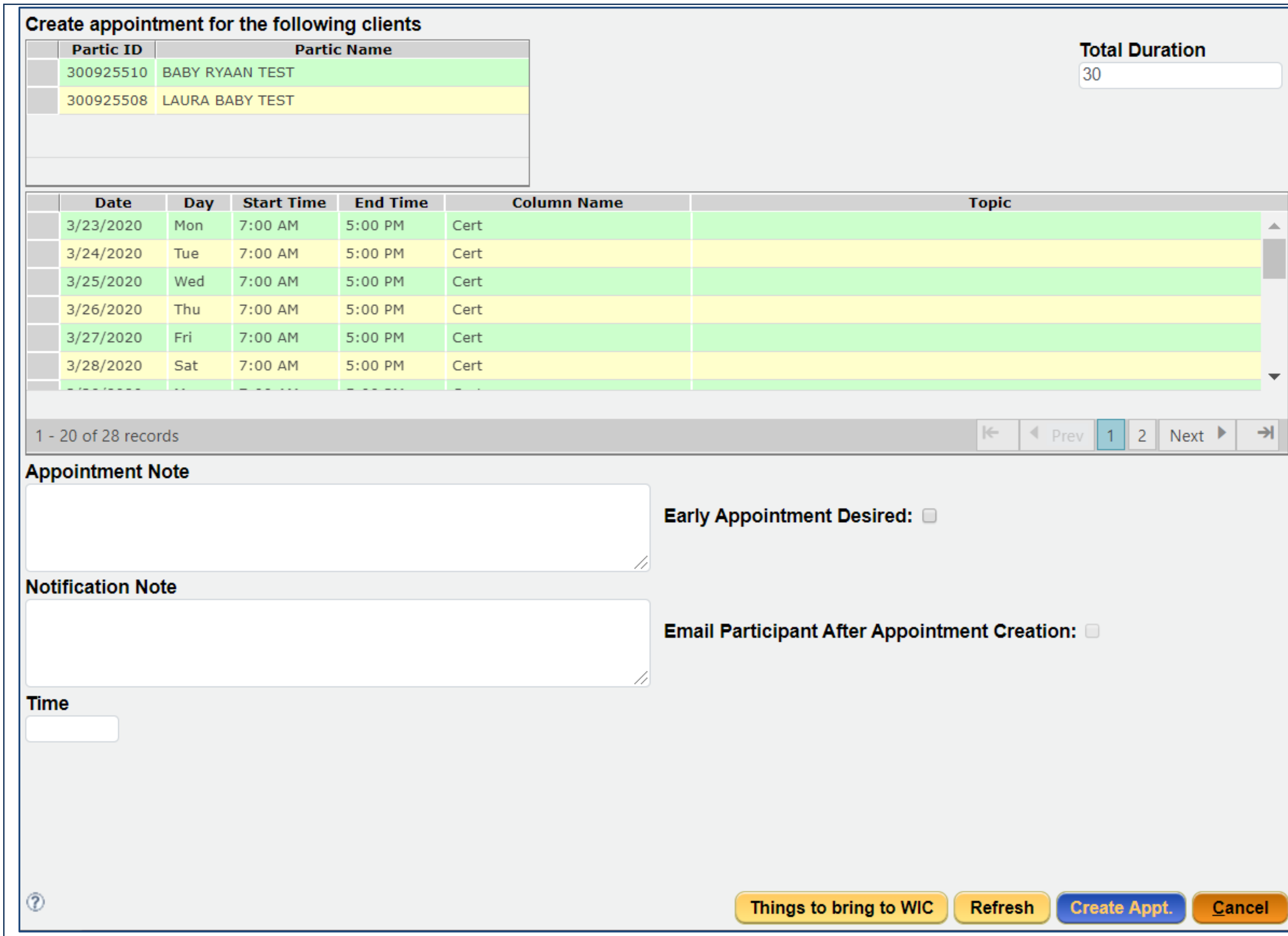
The **Start Date** and **End Date** defaults to blank. Enter the earliest date you wish to search for an appointment. The system automatically sets the End date to 30 days from the Start Date. You may manually change that as needed to include fewer or more days.

The **Start Time** and **End Times** default to the normal clinic hours but can be adjusted. For example, if the household can only come in for an appointment in the afternoons, you would change the Start Time to 1 pm. The **Day** checkboxes allow you to further refine your search to specific days. For example, if the household always has Wednesday's off work, you will uncheck all days except **Wednesday**.

The **Topic** field is used if you are trying to locate the first available class time slot (which is not applicable for a new household). In order to search for a class, the **NEW APPT** type must be **N/ED**.

The **Total Duration** field is system calculated by adding up the **DUR** column in the grid for each participant that needs an appointment.

Once you have all your search criteria set, click the **Search** button. An **Appointment Search Results** popup will display with a list of days/times that meet the entered search criteria. There may be multiple listings for the same day depending on if there are separate blocks of time within the day that have enough available time. The days/times are also listed for each column on the calendar.

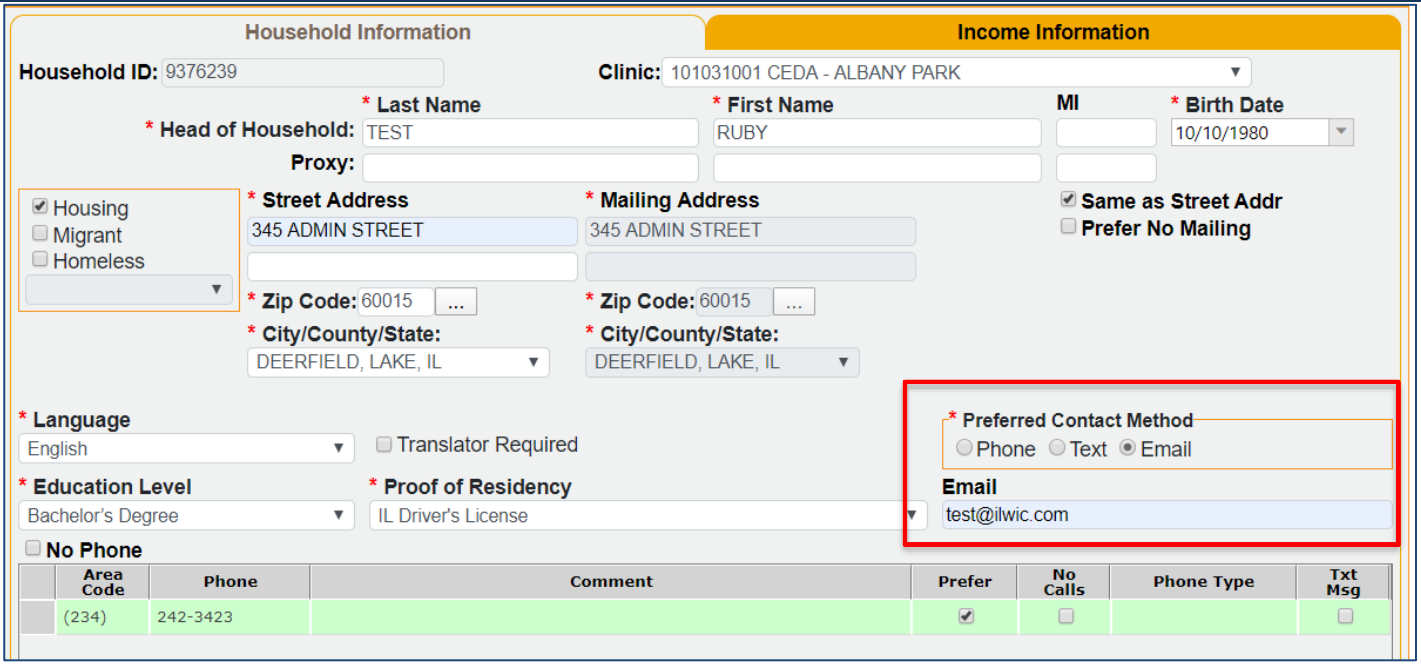


Select the **Day** by clicking on the date and time from the grid where you want to make the appointment. Notice that the **Time field** below the grid defaults to the earliest time available within the time block selected. If the household needs a different time, you will simply **Enter the Desired Time** (using 15-minute increments) up to the displayed **End Time**.

If there is an **Appointment Note** or a **Notification Note** you would like attached to the scheduled appointment chosen, enter it in either of the sections as needed. The difference between the Appointment note and Notification note is:

- **Appointment Note:** Is where the staff will place a **Note** in the system such as (needs to bring. OR, has already viewed) anything specific to the household.

- **Notification Note:** If you want to notify the participant prior to the appointment you can send a **Notification Note** via email to the participant. To do this, you will have to enter in any instructions and then click on the **Email Participant after Appointment Creation** checkbox.



Once you have selected the **Date/Time/Column Name** from the grid, click the Create Appt button at the bottom of the screen. If the appointment slot is available, the system will close the popup and return you to the main **Schedule Appt** screen. The **New Scheduled** appointment will then be displayed in the grid in the **Type** and the **Date Time** columns.

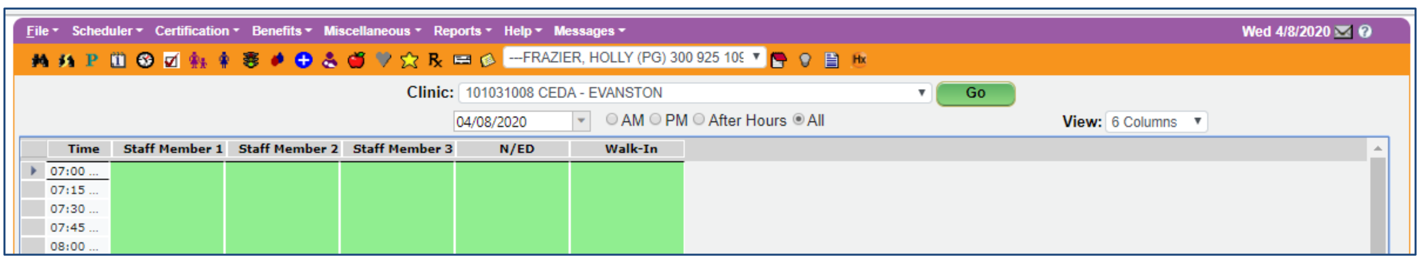
To view other appointments, click on the Appointments button at the bottom of this screen. This opens a popup that shows all **Future** and recent **Past Appointments** for the household.

Once you have scheduled the appointment, you should close the household record that you are in. To do that, simply click on **Search**.

Creating an Appointment from the Daily Schedule Screen

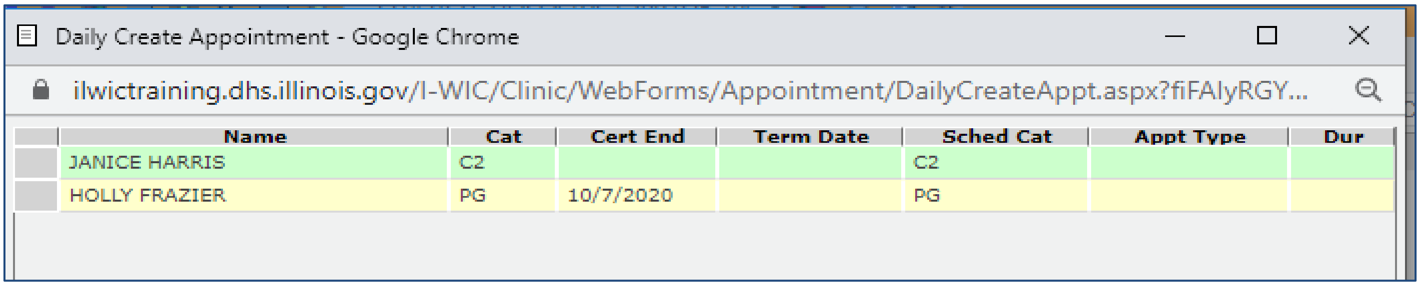
You can also use the **Daily Schedule** screen to schedule appointments. If you are on the **Precertification** screen, you would click the **Save** button to save the changes you just made to that screen, then click on the **Daily Schedule** screen under the **Scheduling Tasks** jellybean.

This screen gives you a view by day and by clinic what appointment slots are available in a **Book** view. Unlike the Schedule Appt screen where you enter filter criteria and the system searches for available time slots, you must manually search for available time slots by specific day when you use the **Daily Schedule**.



I-WIC Training Resource – Clinic

1. You must have a record open to create an **Appointment** using the Daily Schedule.
2. Make sure you have the **Correct Date** and **Clinic** selected. Click the **Go** button to reload the schedule for the date and clinic selected.
3. Click in the **Green** space for the desired time you want the **Appointment** to start and for the **Resource**, then click on the **OK** button on the confirmation popup.



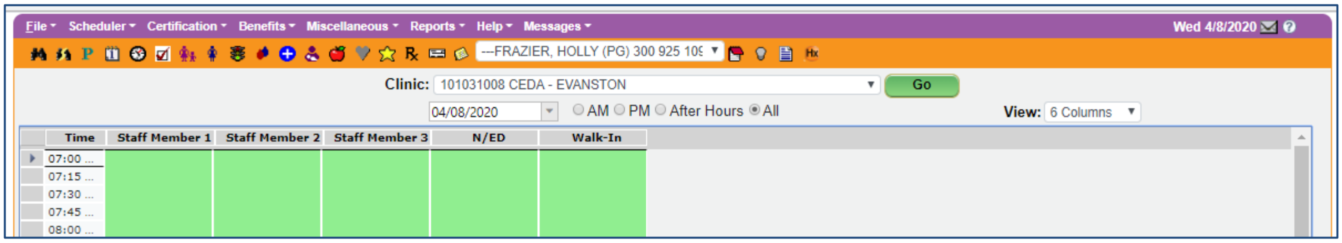
	Name	Cat	Cert End	Term Date	Sched Cat	Appt Type	Dur
	JANICE HARRIS	C2			C2		
	HOLLY FRAZIER	PG	10/7/2020		PG		

4. On the **Daily Create Appointment** popup, select the **Appt Type** for each household member you want to schedule.
5. Based on the appointment type selected, the system automatically defaults the duration **(DUR)**. However, you can manually adjust the **Duration** of the appointment in 15-minute increments.
6. In the **Appointment Note** and **Notification Note** area, add any information that might be pertinent to the appointment.
7. The **Start Date** and **Column Name** fields are read only. If the start date or column name are not correct, you must cancel the screen and start over by selecting the correct date and column name.
8. The **Duration** field is read only and is the combined duration of all appointments being made for the household today.
9. The **Time** is the start time of the slot you selected on the grid. You can change that time here, without canceling and starting over. The system will **Verify** that the entered time is an increment of 15 minutes and that the time slot is available. A popup message will display if either verification fails.
10. Once all fields are completed, click the **Create Appt** button at the bottom of the screen. If all validations pass, the popup will close, and the appointment will be added to the grid.
11. If you attempt to **Schedule** the **Same** participant for the **Same Appointment Type** for more than one appointment, you will get a **Pop-up Message** to confirm if it is **OK**.
12. If only 1 Member of a household has an appointment, that appointment shows the participant **Last** and **First** name and **Appointment Type**.
13. If more than 1 Member of a household is given an appointment, the appointment times are **Combined** into a longer **Single Appointment Block**. The **Last Name** of the **Household** followed by an **H** and the **Start Time** is shown.

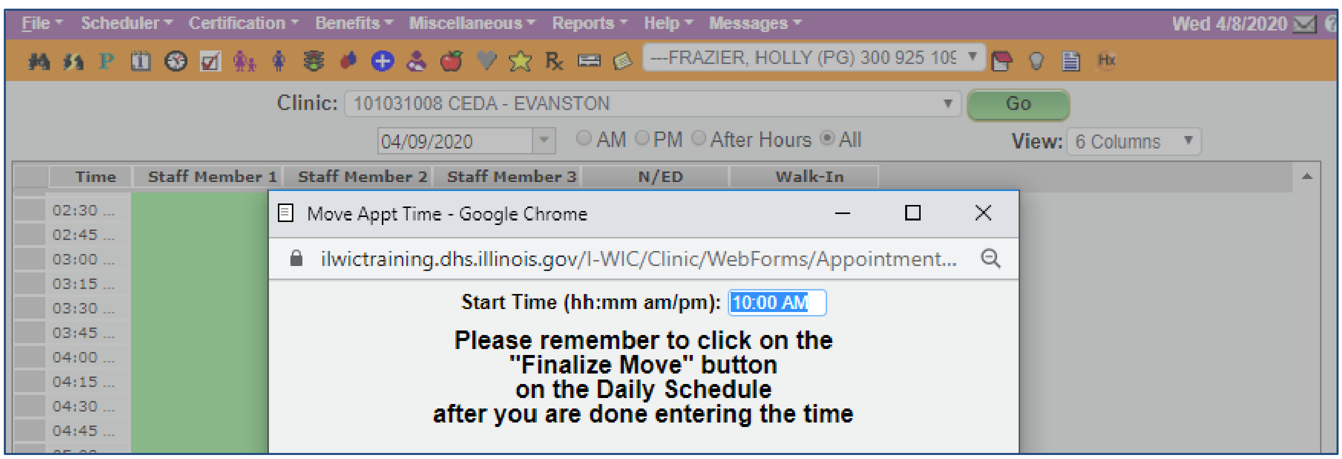
Moving an Appointment

To reschedule an existing appointment for a household:

1. You do not need to have a record open to move an appointment.



2. Go to the **Daily Schedule** on the **Scheduling Tasks** jellybean and select the **Date** and **Clinic** that the household has an existing appointment that needs to be moved.
3. Click once on the **Appointment** that you need to move.
4. Click the **Move Appt** button at the bottom of the screen. Notice that the **Move Appt** button has been changed to **Cancel Move** and the **Appt Move in Progress** is flashing near the top left of the screen.
5. To move the appointment to a different day and/or clinic, change the **Date** and/or **Clinic**, then click the **GO** button to display.
6. Click on a **Green** area for the desired **Time** slot and **Column** name.
7. A **Popup Confirmation** is displayed –click **OK** to continue with the move.



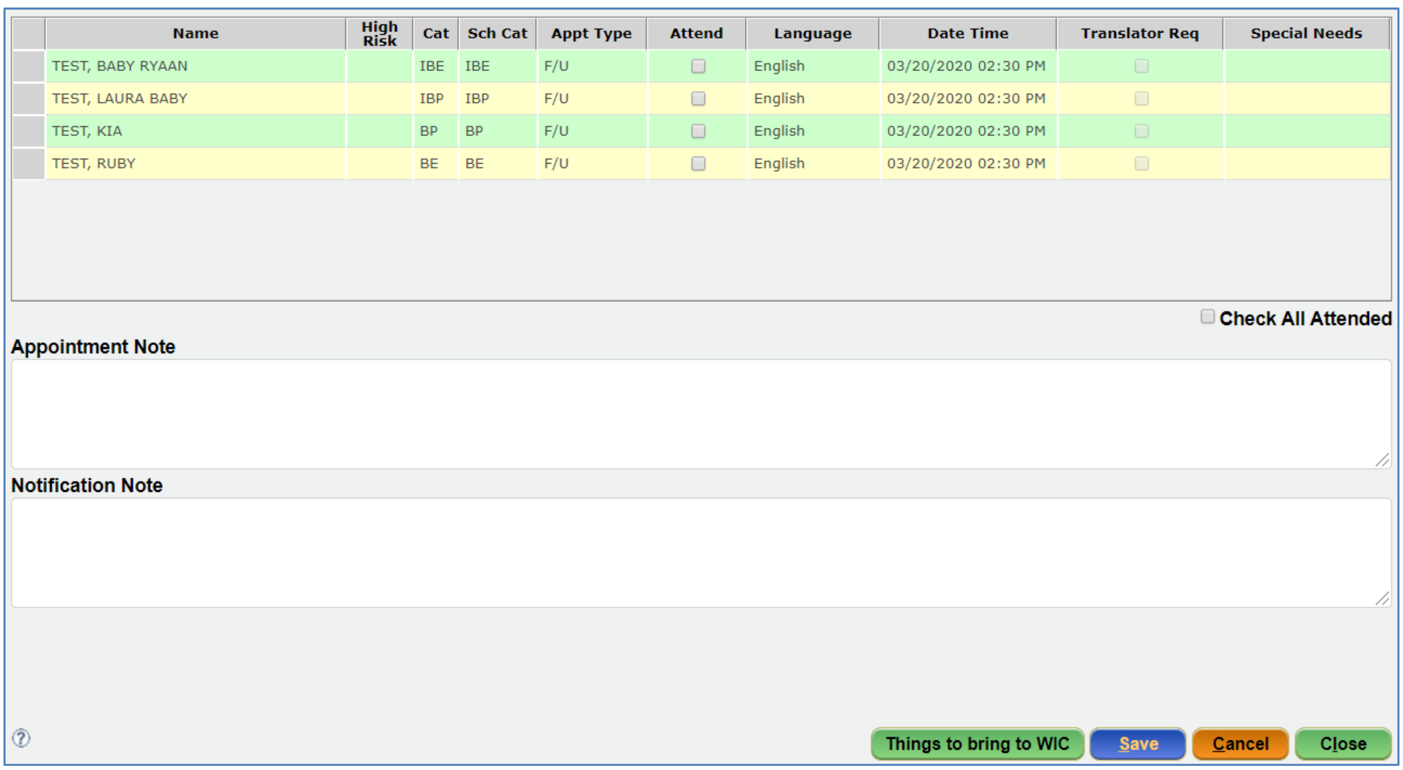
8. A **Move Appt Time** pop up opens displaying the earliest available start time for the column name selected. Change the **Start Time** as needed, then click **OK** to continue with the move.
9. Click on the **Click to Finalize Move** button near the top left of the screen.
10. The appointment will be displayed in the new time slot/date/column name and/or clinic.

Marking an Appointment as Attended or Mark Onsite

1. Marking an appointment as kept or marking a participant onsite can be done from 3 different screens:
   a. Household Summary Screen
   b. Daily Schedule
   c. Precertification

2. From the **Household Summary** Screen:
   a. Use the **Mark Onsite** button on the bottom of this screen only if the person is a walk-in and does not have a prescheduled appointment.
   b. Click on the **Mark Onsite** button, select the **Appointment Type** under the Service column, then click **Close.**

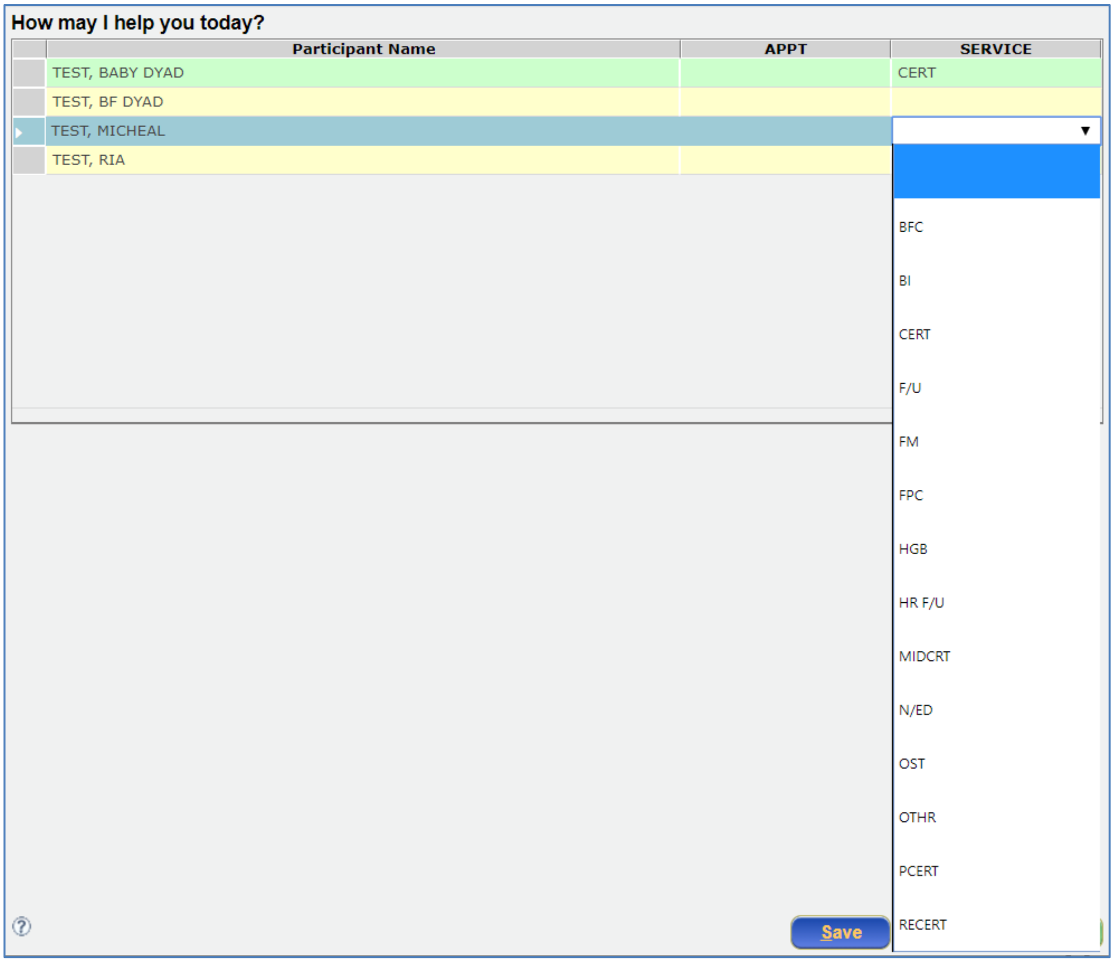
3. From the **Daily Schedule** screen:
   a. Use this screen to **Mark** a **Prescheduled** appointment as **Attended**.
   b. Go to the **Daily Schedule** in the **Scheduling Tasks** jellybean. Locate the **Scheduled Appointment** of the person you want to mark as attended.
   c. Double click on the **Appointment** that you need to mark as attended or single click and then click on the **Attended** button at the bottom of the screen.
   d. A **Popup** screen is displayed listing all household members that are part of the appointment block.



   e. Mark the **Attend** checkbox in the grid for each household member in attendance or mark the **Check All Attended** to mark all appointments as attended. Click on **Close** to save**.**
   f. The **Daily Schedule** screen will refresh, and the marked appointment will change from a **Blue** color to **Purple**. The **Purple** color means the appointment has been **Marked Onsite**.

4. From the **Precertification** screen:

   a. Use the **Mark Onsite** button at the bottom of this screen only if the person is a walk-in and does not have a prescheduled appointment.
   b. Click on the **Mark Onsite** button **at the bottom of the screen**, a popup box will appear.
   c. Select the appointment type from the **Service** category, then click on **Close.**



Canceling an Appointment

NOTE: You do not need to have a record open to cancel an appointment.

1. Go to the **Daily Schedule** on the **Scheduling Tasks** jellybean and select the **Date** and **Clinic** for the household that has an existing appointment that needs to be cancelled.
2. Click once on the **Appointment** that you need to cancel.
3. Click the **Cancel Appt** button at the bottom of the screen.
4. A popup confirmation is displayed – click **OK** to continue with the cancellation.
5. The selected appointment will be **Removed** from the grid.