Kentucky Clinic Management System User Guide

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Update Summary 3

1 DOCUMENT INFORMATION

1.1 DOCUMENT HISTORY

Version	Date Effective	Summary of Changes
[vs. no.]	[date]	[reason for changes]
2.0	May 31, 2013	• New format • Organized by Support Staff and Patient Menu functions • Added WIC Appendix • Updated screenshots •
2.1	October 1, 2013	• Updated text and screenshots based on releases • Added reference links
2.2	May 19, 2014	• Updated text and screenshots based on releases

1.2 DEFINITIONS AND ACRONYMS

Acronym or Term	Definition
Benefit Period	A time period during which WIC benefits may be redeemed. This includes the beginning benefit availability date and ending benefit availability date.
BMI	Body Mass Index
CMS	Clinic Management System
EBT	Electronic Benefit Transfer. The electronic transfer of government benefits to individuals through the use of card technology and point-of-sale terminals.
Host	A central processor/computer which can act as a database processor and/or switch for transactions leaving or coming into a central processor.
KTAP	Kentucky Transitional Assistance Program. KTAP is a monetary assistance program which provides financial and medical assistance to needy dependent children in Kentucky and the parents, or relatives, with whom the children are living.
PEF	Patient Encounter Form

Acronym or Term	Definition
Personal Identification Number (PIN)	A four character numeric code issued to or selected by a cardholder, which must be utilized by the cardholder in conjunction with a card to initiate a transaction.
Retailer	A dealer in foodstuffs, meats, produce, and dairy products. In the context of this document, the term also covers any parties who are authorized by the State to be a vendor of WIC approved items, and/or perform WIC-related computing or financial transactions for them.
RTC	Return to Clinic
System	A collection of hardware, software, persons, and procedures that work together to perform a set of functions.
VOC	Verification of Certification
WIC	Women, Infants and Children. WIC is a Special Supplemental Nutrition Program for Women, Infants, and Children.
WIC Benefit	A product provided by the WIC program to a WIC participant. For purposes of this system, a WIC benefit can be thought of as an authorized food product.
WIC Category	A grouping of authorized food products, such as milk or formula.
WIC Participant	The individual to whom WIC benefits are issued.
WIC Subcategory	A specific type of authorized food product within a WIC category, such as whole milk or skim milk. These are subcategories to the category of milk. Subcategories can be either Broadband (000) or Specific (> 000).

2 INTRODUCTION

2.1 CUSTOM DATA PROCESSING OVERVIEW

Founded in 1981 in LaGrange, Illinois, Custom Data Processing (CDP) is the nation's premier provider of data management systems and services, including two CDP-owned, Tier 3 data centers for the public health community. For over 30 years, CDP has provided customized solutions for public health clinic management, WIC, eWIC, home health, and environmental health.

CDP's business model has been successfully implemented in thousands of sites across the country, providing cost effective tools for the public health professional. Built with client collaboration and designed to meet state and national health standards, CDP's health management systems are important tools for improving the quality of health services to all citizens. To learn about CDP enterprise health solutions, call (800) 888-6035 or visit http://www.cdpehs.com.

2.2 DOCUMENT PURPOSE

This document describes the functionality, configuration, and operation of the Kentucky Clinic Management System. The audience of this document includes:

- Clinic Staff
- Customer support
- State program administrators

2.3 DOCUMENT STANDARDS AND NAMING CONVENTIONS

Throughout the document, the following conventions are used:

- The terminology "click" and "select" indicate that the user should left-click their mouse button once.
- CAPITALIZED FONT signifies text found in buttons, icons, and links displayed on various application screens.
- Important terms are emphasized with **bold text** at the point where the term is introduced and defined.
- `Courier font` represents text that the user enters via their keyboard.
- Nomenclature such as GENERAL->MAIN MENU signifies a navigation path.

3 GETTING STARTED

3.1 APPLICATION OVERVIEW

The Kentucky Clinic Management System is a comprehensive system that:

- Is a Web-based system that is integrated with WIC Direct—the online, WIC EBT solution
- Is a comprehensive clinic management system including patient registration, service reporting, billing, and management reports
- Has an appointment scheduling module
- Has the option to place patients in a household or register them individually
- Features a Growth Chart module that automatically plots measures
- Contains a WIC, automated risk assignment module
- Has a food package assignment module that supports the new Federal food package rules for WIC
- Enables WIC benefit issuance in both a paper system and eWIC
- Accesses a statewide immunization registry

The WIC Direct System is an EBT (electronic benefits transfer) system that is an online, real time, electronic system in which WIC participants access their benefits using a magnetic stripe card, similar to a debit card, instead of a traditional paper food instrument. Highlights of this process include:

Note that throughout this document, the words "patient" and "participant" are used interchangeably.

- A participant is certified as WIC-eligible at a clinic.
- An EBT account with participant demographic information is established through the Kentucky CMS System for each participant.
- An eWIC card is issued to the participant in the clinic and the participant selects a four-digit PIN (personal identification number).
- Monthly food benefits are issued to the client and posted electronically to the participant's account.
- The eWIC card is used to access food benefits in the retail store.
- The EBT host (server) plays the central role in the WIC Direct System. The Kentucky WIC Host interacts with the WIC EBT System to
  - Exchange claim, auto-reconciliation, and error notification files
  - Provide authorized product lists
  - Process online retailer purchase requests

In the WIC Direct System, each family/household member's food benefits are aggregated into a single account. The household account consists of specific types and quantities of food items, each with specific eligibility and expiration dates. These dates are cyclical and are set by the State WIC Authority.

Most WIC participant information is recorded in the CMS system, and then transferred seamlessly to the EBT System. During the initial registration process, registration clerks will be the first point of contact for gathering information about participants in the WIC EBT program. Much of this information is automatically transferred from the CMS system to the EBT system as information is saved during the registration process. Participant, household, eWIC card, and benefit information is also updated in the EBT system each time a change is made in the CMS.

3.2 LOGGING INTO THE APPLICATION

To login to the Kentucky CMS System through the CDP Portal, double click the portal icon, enter the user name and password in the appropriate fields, and click LOGIN. When a user logs into the CDP Portal, they will be logged in to both the CMS and WIC Direct Systems and will be able to move seamlessly between the two systems.

After login credentials are validated, you will be taken to the Main Menu described in Section **Error! Reference source not found.**, "**Application Main Menu**".

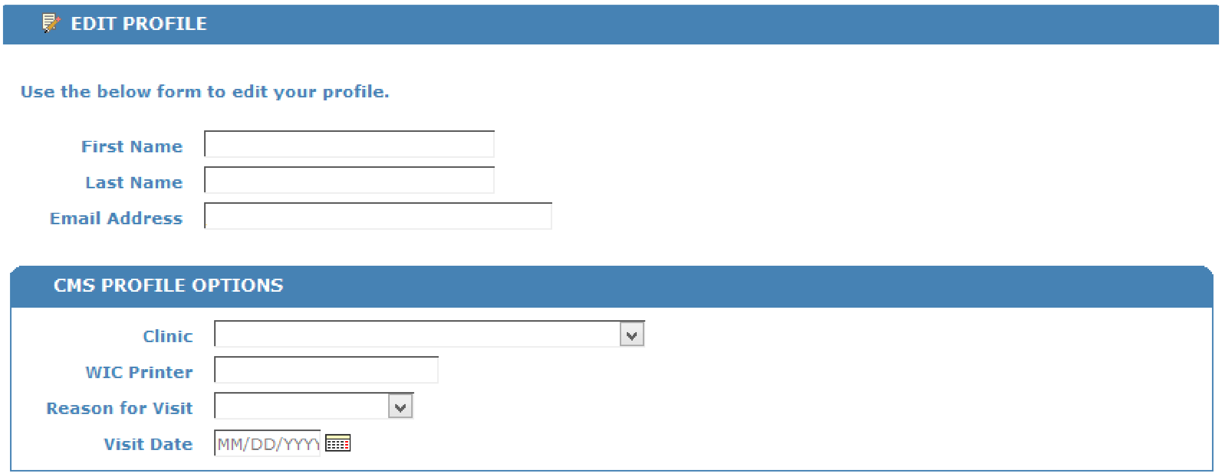
3.3 MANAGING MY ACCOUNT

3.3.1 EDIT PROFILE

To edit your profile, click the 

button at the top of the CDP Portal Main Menu screen.

The Edit Profile screen will be displayed.

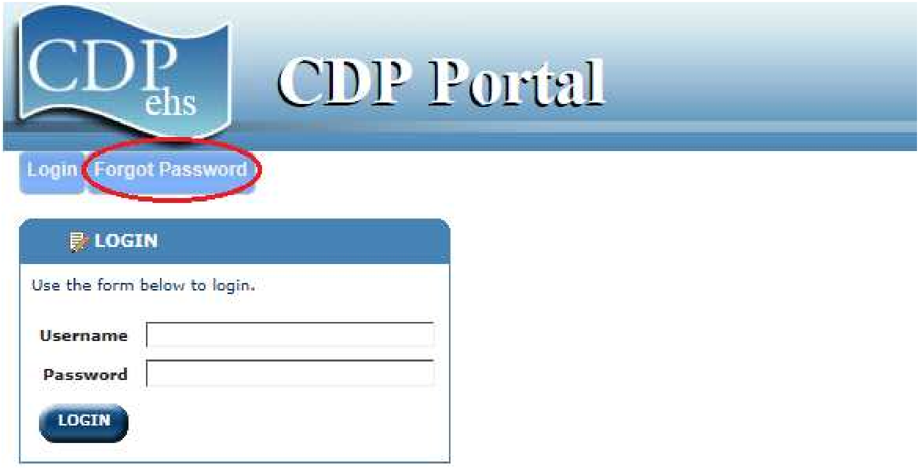


- User profile information that can be edited is First Name, Last Name, and Email Address.
- To edit the CMS Profile Options, use the drop-down menus to change the Clinic or Reason for Visit, or manually edit the WIC Printer and Visit Date.
- To save any changes made, click Save.

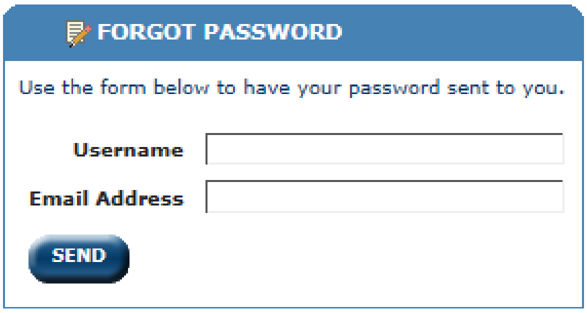
3.3.2 FORGOT MY PASSWORD

If you have forgotten your password, click the 

button at the top of the CDP Portal Login screen.



A screen will appear with a form requesting the Username and Email Address fields to be completed.



Type your Username and Email Address associated with the user account in the appropriate fields, and click the 

button. Your password will be sent promptly to the email address entered.

3.3.3 CHANGING MY PASSWORD

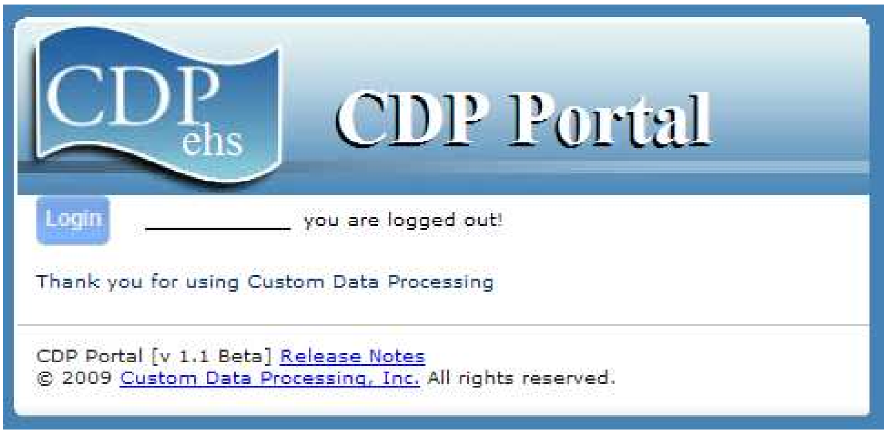
To change your password at any time, click 

at the top portion of the CDP Portal screen.

3.3.4 LOGGING OUT OF THE APPLICATION

To exit the CDP Portal from any screen, click 

. When successfully logged out of the CDP Portal, the following screen will be displayed



3.4 GETTING FAMILIAR WITH THE INTERFACE

This section explains the main Portal screen; used to access most applications, common commands, icons, buttons, and navigation tips for using CMS.

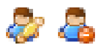
3.4.1 CDP PORTAL

After successful login to the CDP Portal, the Portal Main screen will be displayed including the Memberships and Portal News sections. The Memberships section lists all user groups to which a user belongs; all the systems to which they have access; and all applications to which they have access. In this user guide, the CDP Portal screen will be referred to many times when a user will be switching to a new application within CMS.


CDP ehs
CDP Portal
Portal
Edit Profile
Change Password
Logout
Welcome,
MEMBERSHIPS
Groups
CDP Administrators
DMS Audit
DMS Edit
DMS Export
DMS Import
DMS Scan
DMS Upload
DMS User
KYCMS_C500_Household
KYCMS_C500_Registration
KYEBT_User
Kentucky WIC EBT
Systems
CDP
CDP Reporting
Global
Kentucky State
Household
Kentucky Clinic Management
Kentucky Wic EBT
Applications
CDP Security
· Portal News
· Access Logs
· Users
· Groups
· Locations
· Systems
· Objects
· Question Group
· Question
WIC Food Instrument
· FI Range Search
· Report Comments
Report Viewer
CDP Report Viewer
EBT Update
Handwritten FI Product Rebate Redemption
Ky State Tables
Commensurate Pricing
FM Vendors
Healthy Start
Household
· HH Search
· HH Received
· HH Cancel Transfer
Immunization
Patient Search
Scheduling
· Holiday
· Provider
· Provider Schedule search
· Appt Patient Search
· Schedule List
WIC Food Package
· Category Search
· Subcategory Search
· Unit of Measure Search
· WIC Message Search
EBT
· Search Cardholders
· User Search
· Add Vendor
PORTAL NEWS
No news found.

3.4.2 CMS AND WIC EBT BUTTONS & ICONS

FUNCTION	BUTTON/ ICON
Add Household information	ADD
View a participant's WIC Benefits	BENEFITS
Cancel information and return to the previous screen	CANCEL
Print a certificate of a patient's immunization records	CERTIFICATE
Clear existing information	CLEAR
Transfer information to a different county	COUNTY TRANSFER
Create a new household	CREATE NEW HOUSEHOLD
Delete a previous entry	DELETE
Go to the EBT Account screen	EBT ACCT
Issue an eWIC card	EBT CARD
Edit an existing record	EDIT
Export benefits	EXPORT
Retrieve forgotten password	Forgot Password
Initiate a search	GO
Go to the Household Search screen	HH SEARCH
Hide a search filter	HIDE FILTER
Issue patient benefits	ISSUE BENEFITS
Create and print labels	LABELS
Log out of CMS System	Logout
Go to Member screen	MEMBER
Modify patient's benefits	MODIFY
Add a new record	NEW

Create a new household	NEW HOUSEHOLD
Go to the Patient Menu screen	PATIENT MENU
Return to the menu of Applications and Systems	PORTAL
Go to the Registration screen	REGISTRATION
Replace Benefits in Food Package Replacement	REPLACE BENEFITS
Return to the previous screen	RETURN
Go to the Return to Clinic screen	RTC
Save data entered	SAVE
Save information entered and add an eWIC Cardholder	SAVE & ADD CARDHOLDER
Save information and return to the Account Details screen	SAVE & BACK
Save information and go to the Income/Proofs screen	SAVE & INCOME/PROOFS
Save information and go to the Patient Menu	SAVE & PATIENT MENU
Save information and return to the Portal	SAVE & PORTAL
Save information and add third party liabilities	SAVE & 3RD PARTY
Save information and go to the VOC screen	SAVE & VOC
Save information and go to the WIC Issuance screen	SAVE & WIC ISSUANCE
Initiate the search process	SEARCH
Show a search filter	SHOW FILTER
Transfer patient information	TRANSFER
Update a record	UPDATE
Void Benefits in a Food Package	VOID BENEFITS
Return to the first or last page of results	
Return to the previous or next page of results	
Go back to a main page	
Edit or Update a Record	
Go to the WIC 75 Report	
Show a Record	
View more information	
Select a date	
See how the results were filtered	
Update a User/View User Details	

Update a Vendor/View Vendor Details

3.4.3 NAVIGATION TIPS

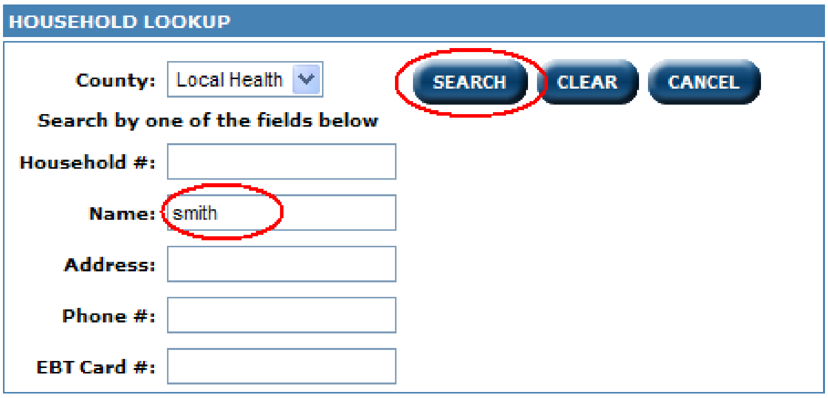
Using Search Filters

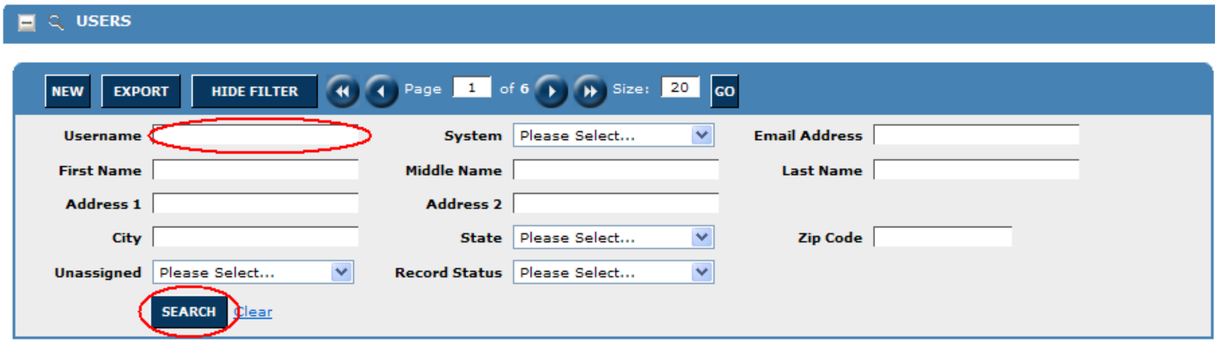
- When using search filters in the CMS or WIC EBT Systems, the filters may differ in appearance, however the operations work in the same manner.

Click inside of the search filter box; enter information, and then click 

.

Examples:

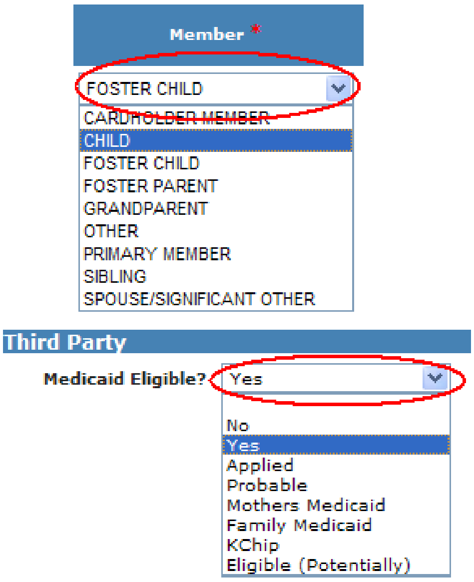




There are several methods of selecting information within the search filters. These include: typing the information into a search box, drop-down menus, scroll menus, and more.

Drop-down Menus

- Many times the Search Filter sections will also contain drop-down menus. Clicking in the drop-down field will display a list of choices. Left-click on the arrow, then click on one of the answer choices. Below are examples of drop-down menus.



Main Screen Arrow Indicator

- A red arrow pointing to a screen name indicates the screen the user should be on to continue. The following example shows that in order to get to the Account Balance screen, the user must first be on the Patient Menu screen.

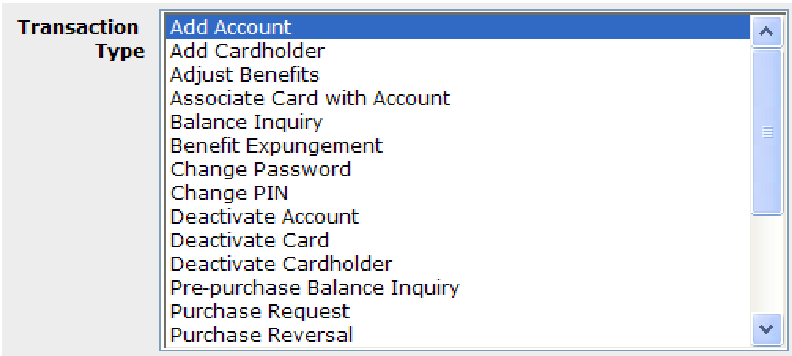
Patient Menu screen

To access the **Account Balance** screen from the Patient Menu screen, click Account Balance.

Scroll Menus

- Another method of selecting information for a search is the scroll menu. Use the arrows on the side to scroll through the options, then click an answer choice and it will be highlighted. This is a multi-item select field. To select multiple items from the list, hold the "Ctrl" button on the keyboard and click multiple items.

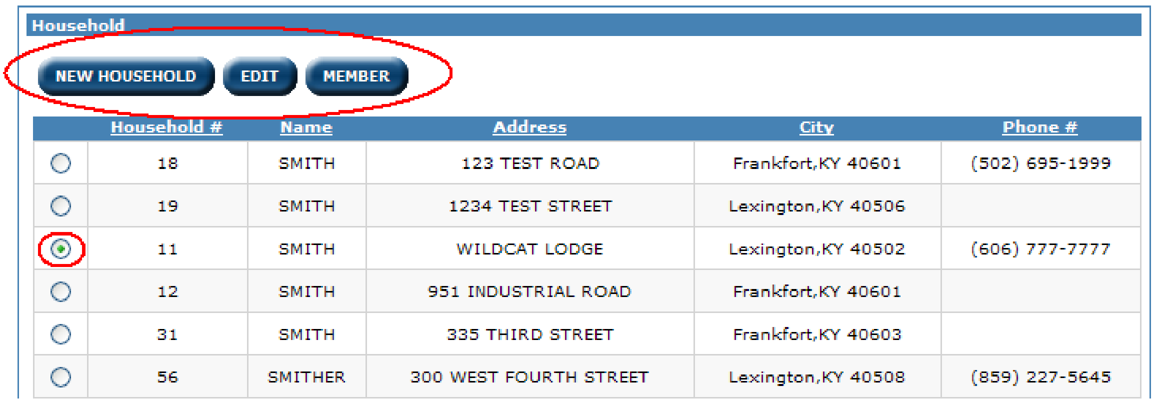
Example:



Selecting Individuals

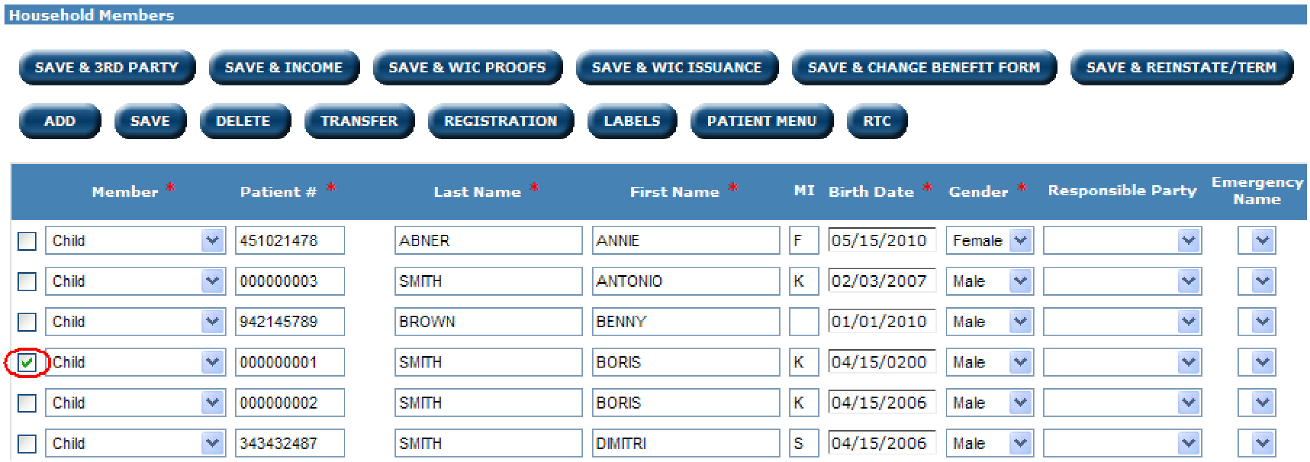
- There are many instances in the CMS System in which a single household or patient should be selected from a list of households or patients, and then a button must be clicked to perform a function with that individual.

  In some cases, a radio button must be selected that corresponds with the desired information. This is shown below in the Household Search screen. After the radio button has been marked, click a button to perform the desired function.



	Household #	Name	Address	City	Phone #
	18	SMITH	123 TEST ROAD	Frankfort,KY 40601	(502) 695-1999
	19	SMITH	1234 TEST STREET	Lexington,KY 40506	
	11	SMITH	WILDCAT LODGE	Lexington,KY 40502	(606) 777-7777
	12	SMITH	951 INDUSTRIAL ROAD	Frankfort,KY 40601	
	31	SMITH	335 THIRD STREET	Frankfort,KY 40603	
	56	SMITHER	300 WEST FOURTH STREET	Lexington,KY 40508	(859) 227-5645

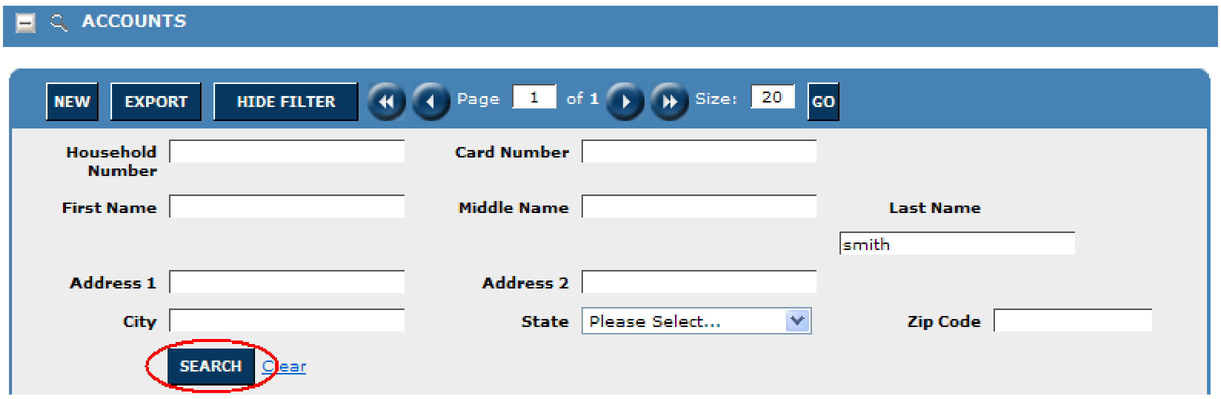
A similar way of selecting an individual from a list may be check-marking a box corresponding with that individual.



After an individual is selected, then any of the buttons above may be selected: Delete, Transfer, Registration, Patient Menu, etc. If a button is clicked before selecting an individual, the following message may appear: Must Select Patient for ____________

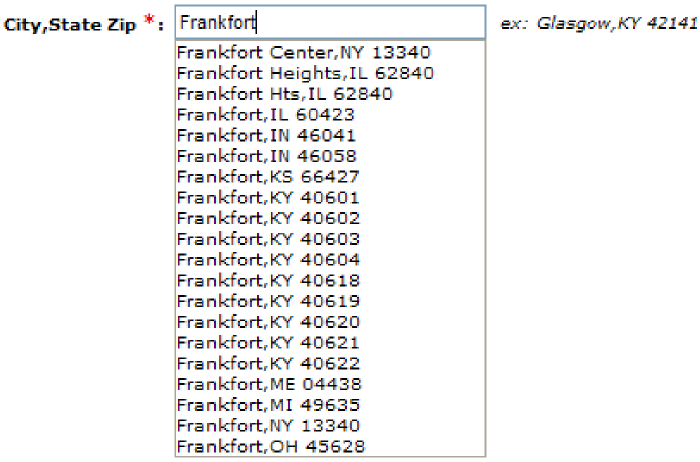
Initiating a Search

- In the EBT System, the Search button is used to initiate a search.



Entering a Location

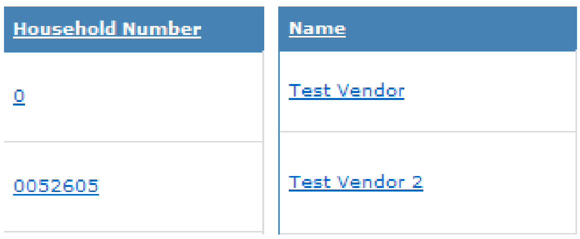
- The filter labeled "City/ State/ Zip" requires information entered in a very specific format. It is easier to avoid error messages by typing just the city, then waiting for the drop-down of cities to appear and selecting one. Do not type a space after entering the city.



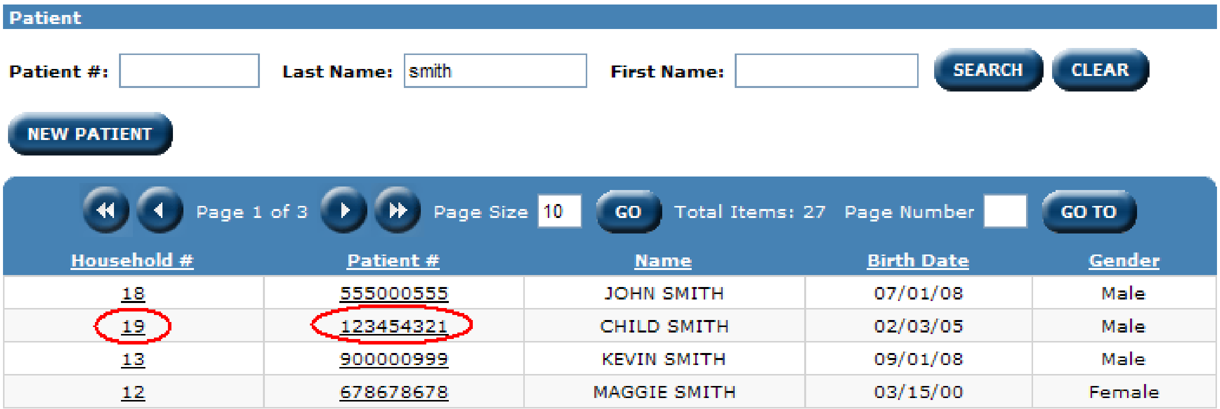
Links

- In the EBT System, links underlined in blue are links to related information, such as a household number, patient or participant names, vendor names, email addresses, etc.

Examples:

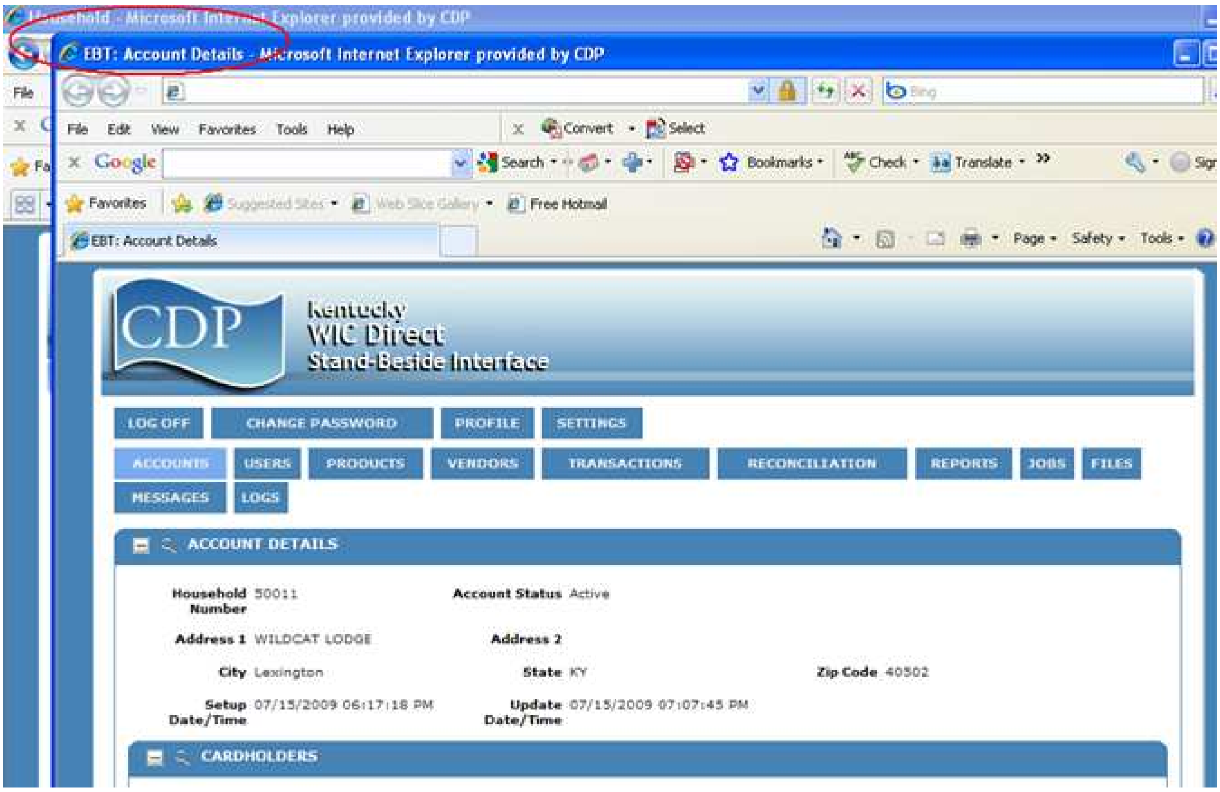


- In CMS, links underlined in black are links to related information, such as household numbers and patient numbers.



CMS and EBT have separate browser windows

- When navigating from the CMS System into the EBT System, there will always be a separate browser window that pops up for the EBT System. This means that clicking the "back" button at the top of the browser will not go back to a CMS screen. To return to CMS, just close out of the EBT browser window.

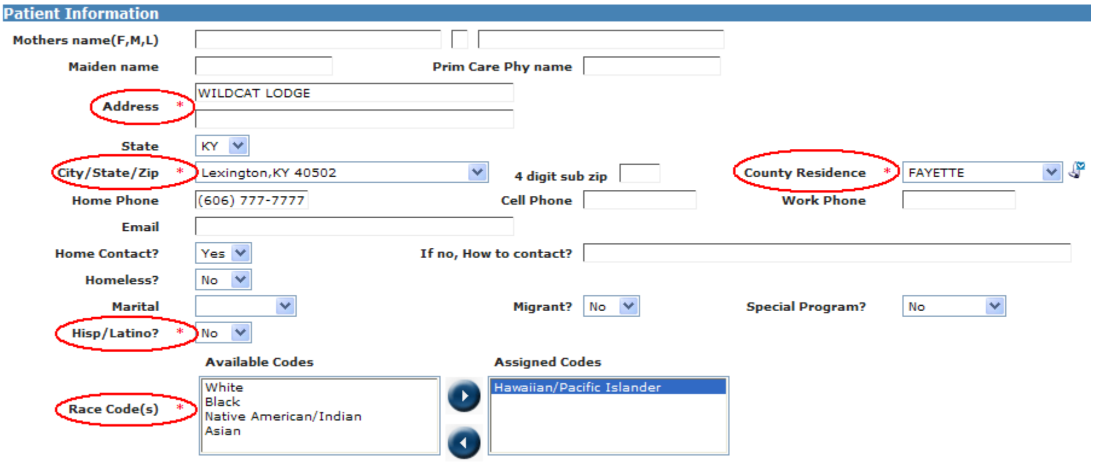


****Note: There are multiple browser windows open.*

- To close out of the EBT browser window, click the  at the top right portion of the screen.

Required Fields

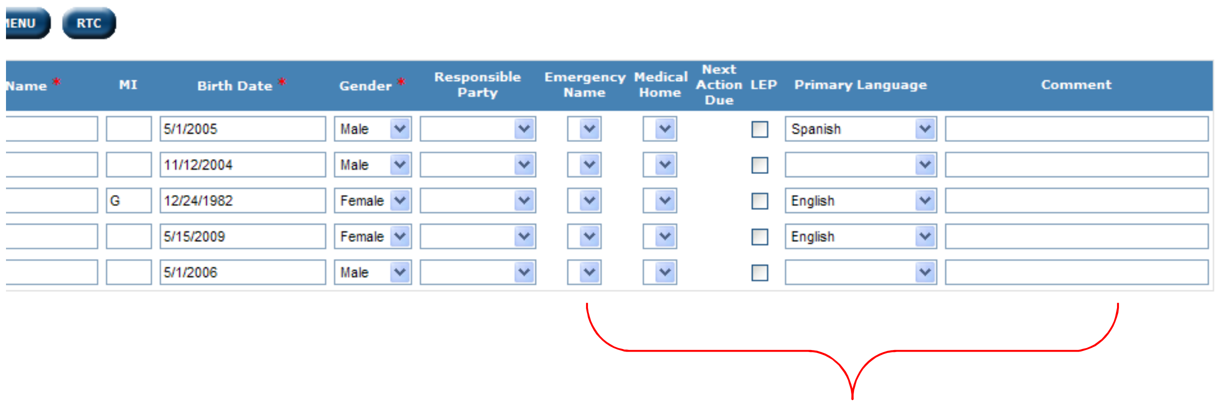
- Any field with a red asterisk* next to it is a required field. The screen cannot be completed until the required information has been entered.



Screens that extend past the width of a standard screen

- In the CMS System, there are some screens that require scrolling to the right to view all the fields. These fields extend beyond the width of the screen. The Household Member screen is an example.

- The screen must be scrolled so that the information to the right can be seen: Emergency Name, Medical Home, LEP (Limited English Proficiency), Primary Language, and Comments.

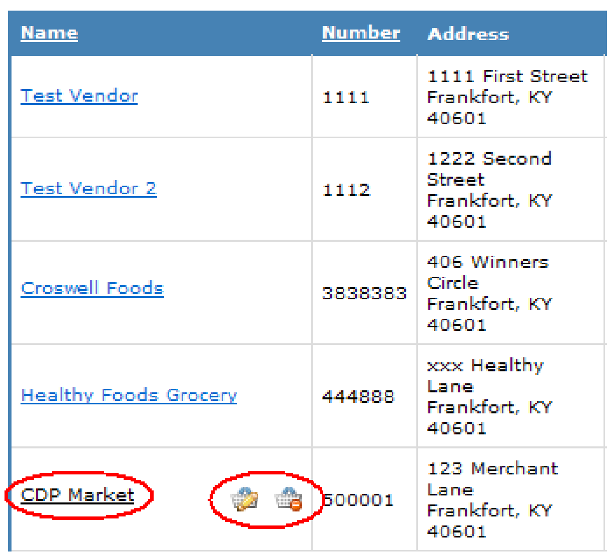


Name *	MI	Birth Date *	Gender *	Responsible Party	Emergency Name	Medical Home	Next Action Due	LEP	Primary Language	Comment
		5/1/2005	Male						Spanish	
		11/12/2004	Male							
	G	12/24/1982	Female						English	
		5/15/2009	Female						English	
		5/1/2006	Male							

Moving cursor over text to reveal an icon

- In the EBT System, there are instances where icons will only be revealed after the cursor is moved over text.

  In the example below, the EBT Vendors screen, the cursor moved over “CDP Market”. Note the icons that appeared.



Name	Number	Address
Test Vendor	1111	1111 First Street Frankfort, KY 40601
Test Vendor 2	1112	1222 Second Street Frankfort, KY 40601
Croswell Foods	3838383	406 Winners Circle Frankfort, KY 40601
Healthy Foods Grocery	444888	xxx Healthy Lane Frankfort, KY 40601
CDP Market	500001	123 Merchant Lane Frankfort, KY 40601

Another instance where this occurs is on the EBT Users screen.

Username	System
Allie.Williams	OWE
Allison.James	OWE
Amy Smith	OWE
andy.vail	KY CMS
angelak.howard	KY CMS
Annie.Oakley	OWE
anthony.davis	KY CMS

Lists of pages of results

- After performing a search, there may be several pages of results, but only the first page is visible. Use the arrow buttons to move to the next, last, previous, and first pages.
- Notice that the example shown on the following page has 3 pages of results. The Page Size is 10, therefore 10 results are shown. Use the arrows to navigate through the pages.

- The page size can be changed to show more or less items per page. Change the number in the Page Size box and click Go.

Patient

Patient #: **Last Name:** smith **First Name:** SEARCH CLEAR

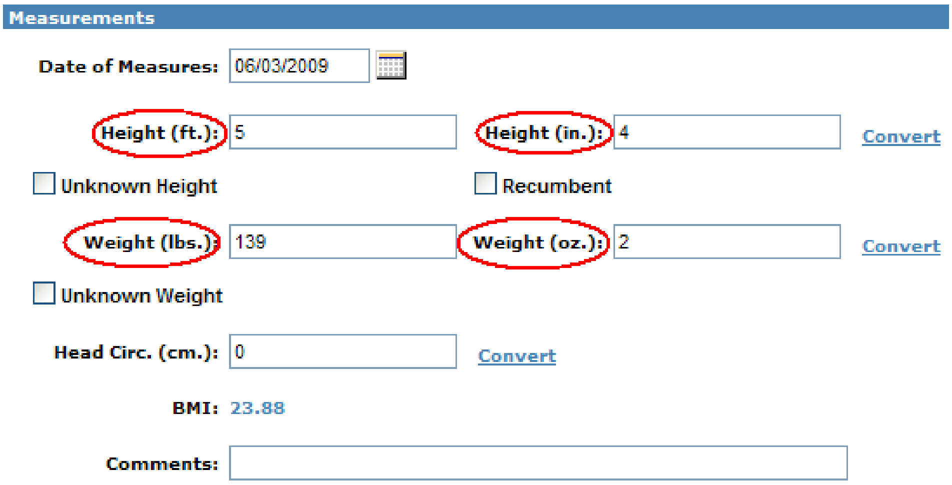
NEW PATIENT

Page 1 of 3 Page Size 10 GO Total Items: 27 Page Number GO TO

Household #	Patient #	Name	Birth Date	Gender
18	555000555	JOHN SMITH	07/01/08	Male
19	123454321	CHILD SMITH	02/03/05	Male
13	900000999	KEVIN SMITH	09/01/08	Male
12	678678678	MAGGIE SMITH	03/15/00	Female
42	5454212	ELIZA K SMITH	12/13/80	Female
13	544545454	HANK SMITH	05/01/06	Male
3	985462211	PENNY SMITH	02/25/06	Female
New	416393872	CARI SMITH	10/25/91	Female
New	A-S121059	ABE S SMITH	12/10/59	Male
31	777888777	ORLANDO SMITH	05/01/97	Male

Entering Measurements

- When entering measurements in the Growth Chart application, it is important to pay attention to the filters. There are separate filters for feet and inches and pounds and ounces. It is not necessary to enter "ft." or "in.", just enter the numeric measurement.



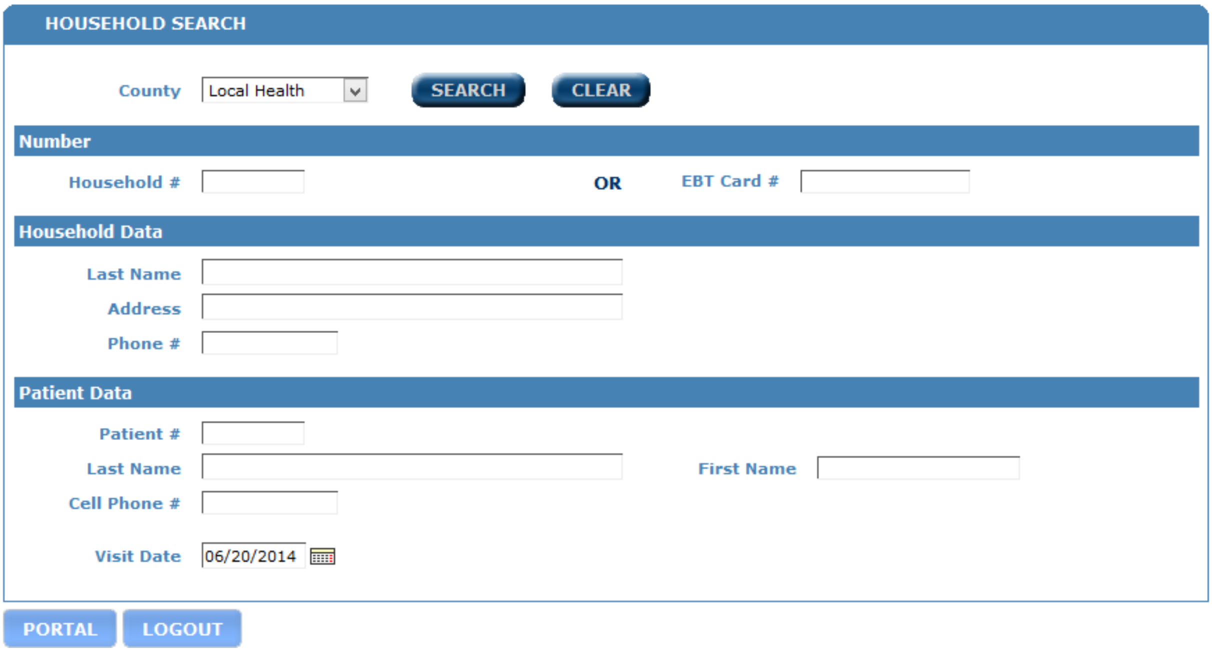
- The person's measurements shown above would be 5 feet, 4 inches. They would weigh 139 pounds, 2 ounces.

4 PATIENT FUNCTIONS

Patient functions are functions that can be performed for an individual, rather than a household. These functions include searching for a patient, editing patient information, and registering a patient.

4.1 HOUSEHOLD SEARCH & PATIENT SEARCH SCREEN

To access the Household Search screen from the Portal screen, click the Household or Household Search link in the list of applications. Once the application has been successfully accessed, the Household Search screen will be displayed.



From this screen there are two options for searching within the system:

- Searching for a household.
- Searching for a patient.

4.1.1 PATIENT SEARCH

To search for a patient, use the bottom portion of the **Household Search Screen**, as displayed below.

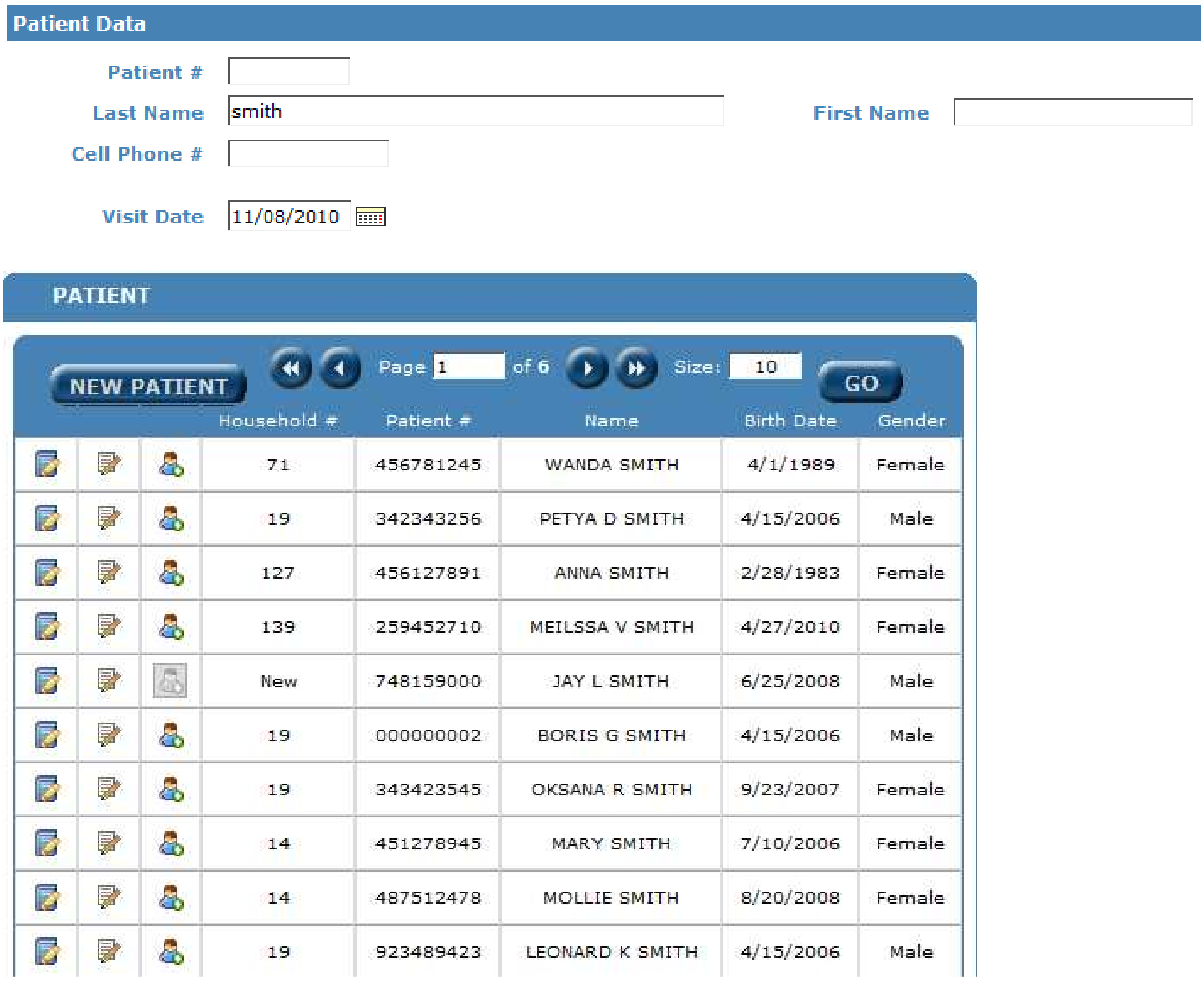
- Click once inside the boxes and type the **Patient #, Last Name,** and **First Name**, **or Cell Phone #**, then click 

. The Patient # does not have to be used; however it will often return a direct hit.

Once information for the search filters has been entered, a list of records matching the search criteria will be displayed.

If a last name has been entered in the search filter, there may be more than one page of results. Use the arrows to navigate to the previous page, next page, or last page.

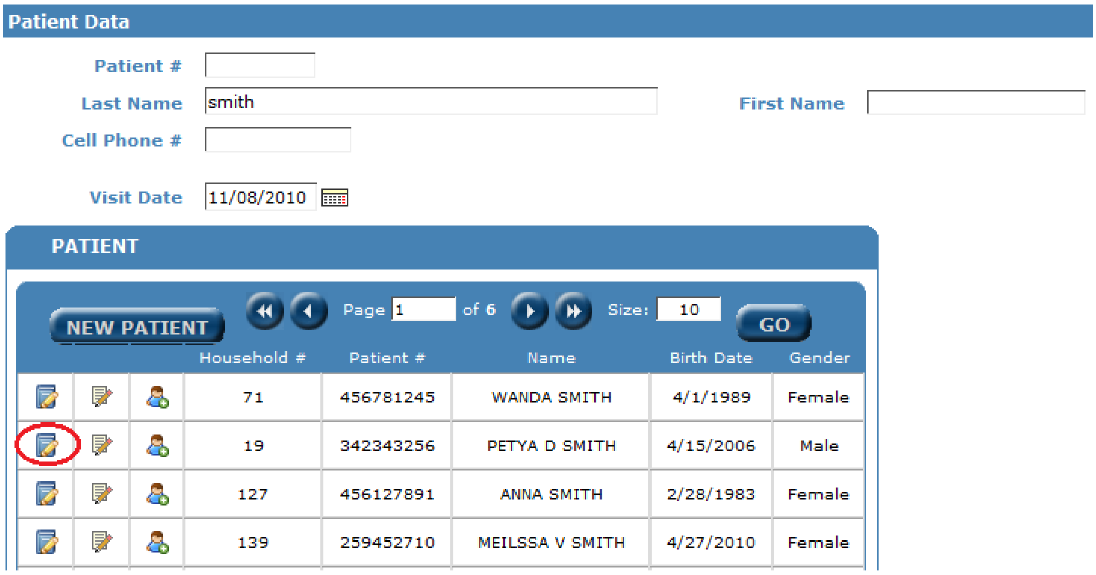
****Note: The number of records that appear on the page can be changed by entering the number of results per page in the Page Size box.*



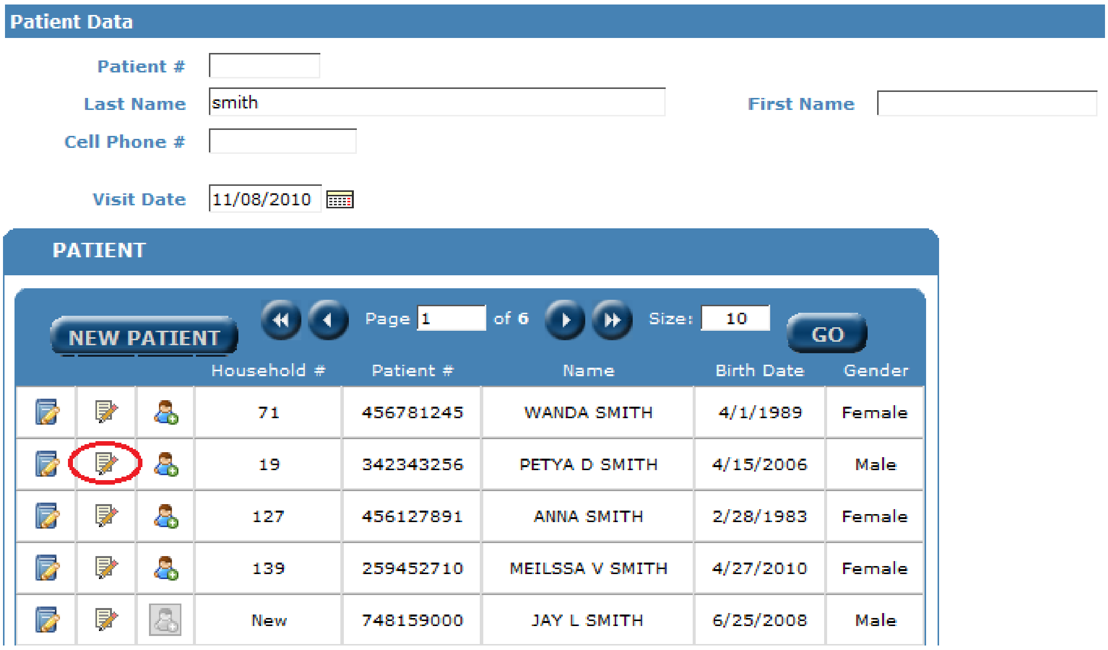
Patient Is Found

Once the results are displayed, if the patient is listed, there are three options: Go to Registration screen, Edit Household, and Go to Member screen (if the patient is in a household).

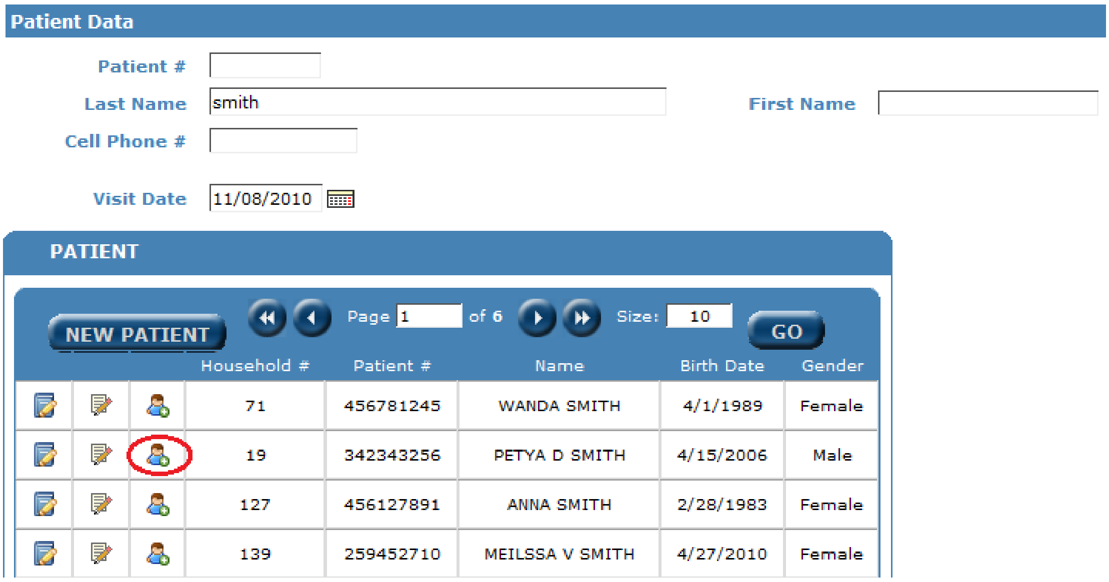
- To go to the Registration screen for that patient, click the Registration icon .



- To go to the **Household Edit** screen, click the Household Edit icon . Refer to Editing a Household for more information.



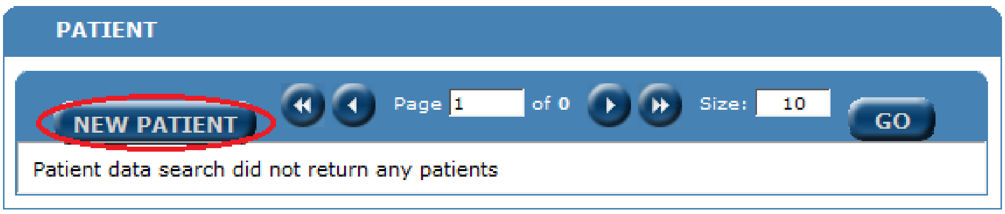
- To go to the Member screen corresponding to the patient's household, click the Go to Member icon . If the patient is not in a household, the member icon is grayed out.



Patient Is Not Found

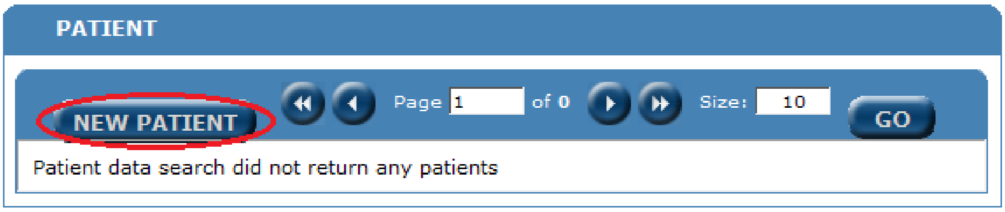
If the results displayed do not show the desired patient, a new patient can be created in the system.

- To add a New Patient, click  which then displays the **Registration Screen.**

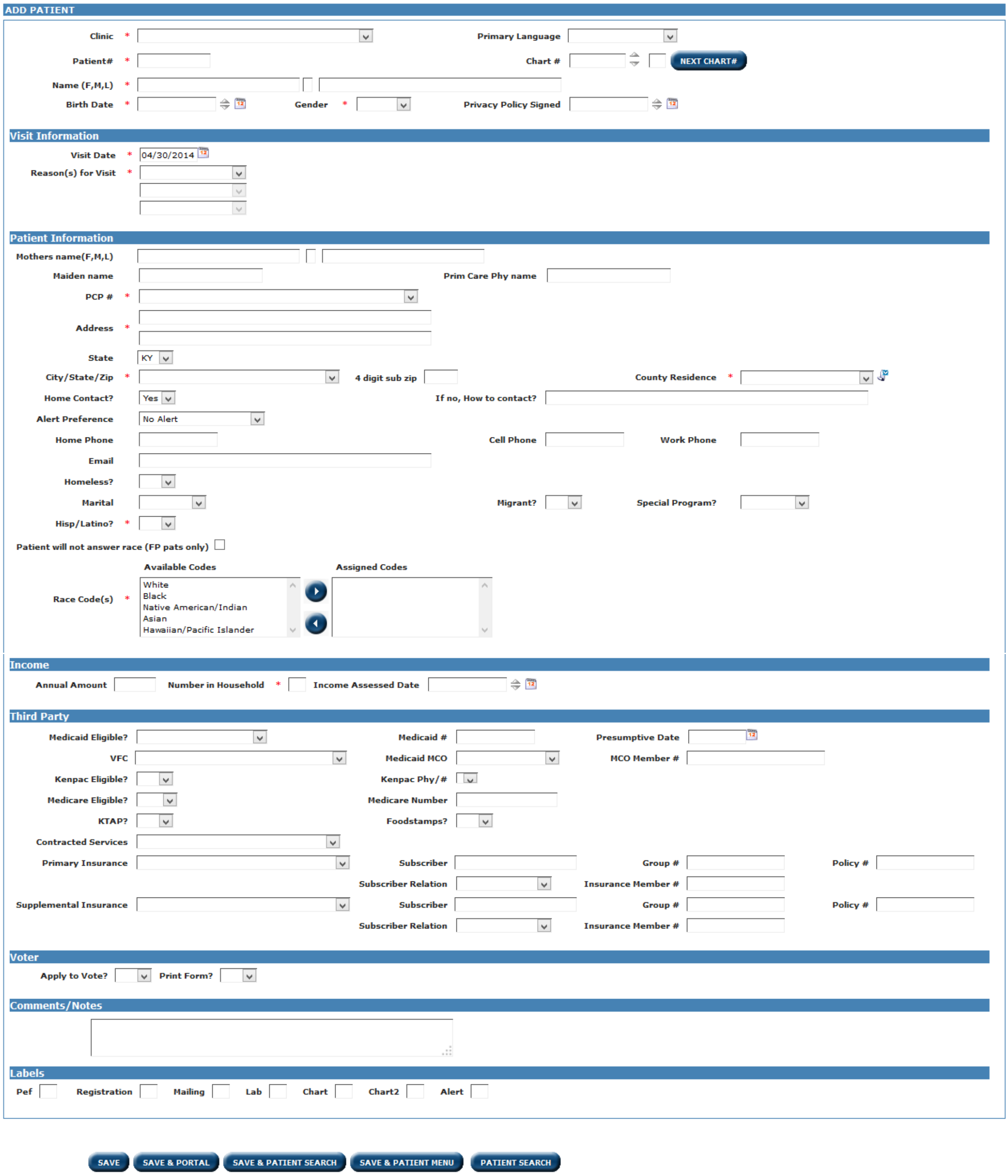


4.1.2 ADDING A NEW PATIENT

After searching for the patient from the Household Search screen, if the patient is not found, click .



The **Registration Screen** will then be displayed.



4.1.3 REGISTERING A NEW PATIENT

Registration Screen

The Registration screen is divided into eight sections: **Add Patient, Visit Information, Patient Information, Income, Third Party, Voter, Comments/ Notes, and Labels.**

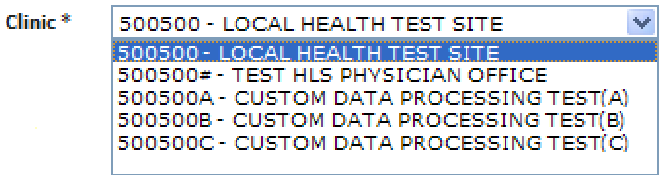
General Information

Information entered in the **Add Patient** section is general information about the patient: **Clinic, Patient #, Name** (First, Middle, Last)**, Birth Date, Gender, Primary Language, Chart #,** and **Privacy Policy Signed.**

The **Clinic** (set by access role)**, Gender,** and **Primary Language** boxes are drop-down menus  . Left-click on the arrow and select one of the answer choices.

***Note: Clinics which provide WIC services are flagged in the system. Only clinics providing WIC services will allow a WIC Reason for Visit.

Example:



Visit Information

Information entered in the **Visit Information** section is: **Visit Date,** and **Reason Codes.**

- The **Visit Date** will be auto-filled with today's date. A different date can be typed into the field. Once the Visit Date is entered, click 

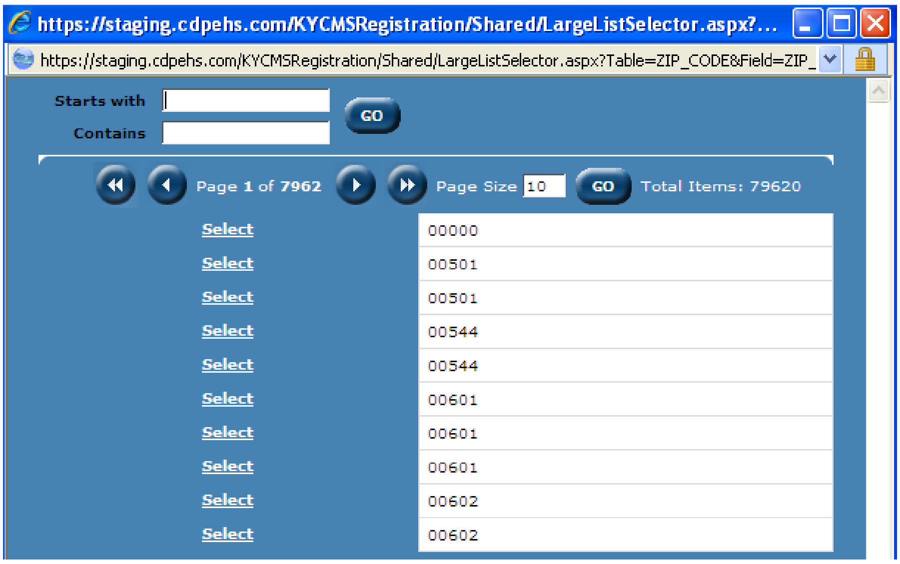
.
- Use the drop-down menu to select a **Reason Code(s).**

Patient Information

Information entered in the **Patient Information** section is: **Mother's name (First, Middle, Last), Maiden Name** (for the Patient being registered, if applicable)**, Prim Care Physician name, Address, City/State/Zip, 4 digit sub zip, County Residence, Home Contact** (The patient may not want to be contacted at the address given)**, If No, How to Contact?, Alert Preference** (for the auto dialer)**, Home Phone, Cell Phone, Work Phone, Email, Homeless, Marital, Migrant, Special Program, Hispanic/ Latino, Patient will not answer race** (for family planning patients only)**,** and **Race Code**(s)**.**

- The **City/State/Zip and County Residence** sections have drop-down menus. The County of Residence has the option to view more choices by clicking .

****Note: Clicking will display a pop up window with additional choices. The screen is displayed below.*



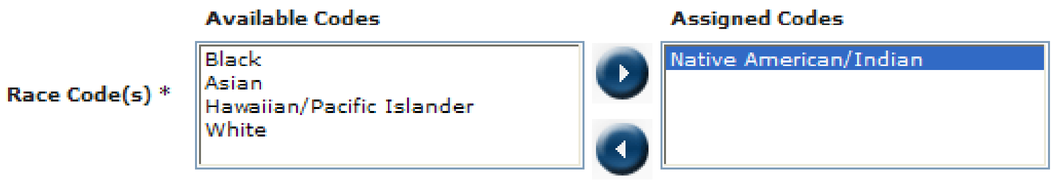
- The **Home Contact, Alert Preference, Homeless, Marital, Migrant, Special Program, and Hispanic/Latino** sections have drop-down menus. Left-click on the arrow, then left-click on an answer choice.

Note: The Alert Preference field is used for the Auto Dialer. The preference selected will be the method used to alert the patient of appointments.

Race Codes

- To select a race code left-click on a race, then click . This will add the race code to the Assigned Codes table.

- To remove a race code left-click on the "assigned race code" to be removed, and then click .



****Note: Multiple race codes can be added.*

Income

Information in the **Income** section is: **Annual Amount, Number in Household, and Income Assessed Date.**

- Income will auto fill from the Member screen and Income screen, if either screen has been completed.
- Use the calendar icon to select an **Income Assessed Date by left-clicking on the icon, then clicking on a day, or manually enter the date.** ****Note: The income eligibility guidelines are compliant with HHS and USDA regulations.*

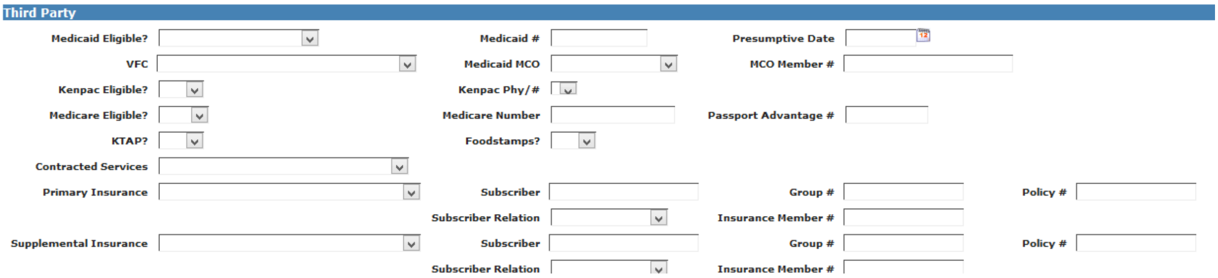
**Refer to WIC Procedures Section, 1.4 WIC Registration*

Third Party

Information in the **Third Party** section is: **Medicaid Eligible, Medicaid #, Presumptive Date, VFC, Medicaid MCO, MCO Member #, Kenpac Eligible, Kenpac Physician/ #, Medicare Eligible, Medicare #, Passport Advantage #, KTAP** (Kentucky Transitional Assistance Program)**, Food Stamps,** and **Contracted Services. Insurance fields are available for completion if the patient is not in a household; if the patient is in a household, these fields are transferred from the completed household screens.**

Many of the sections under **Third Party** have drop-down menus. Left-click on the arrow, and then click on an answer choice.

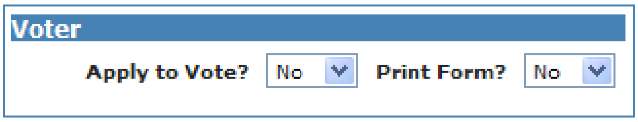
**Refer to WIC Procedures Section, 1.4 WIC Registration*



Voter

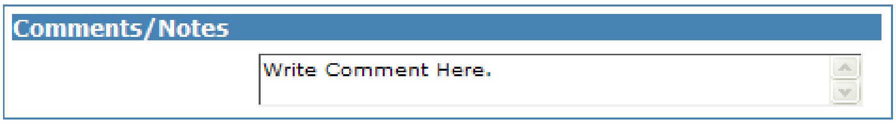
Information in the **Voter** section is: **Apply to Vote and Print Form.**

- Use the drop-down menus to select "yes" or "no".



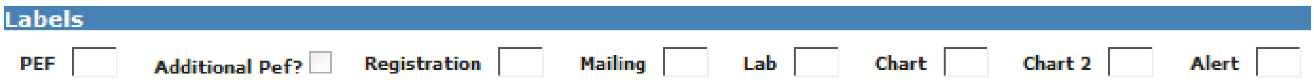
Comments / Notes

There is an option to left-click in the **Comments/ Notes** section and type a note about the patient.

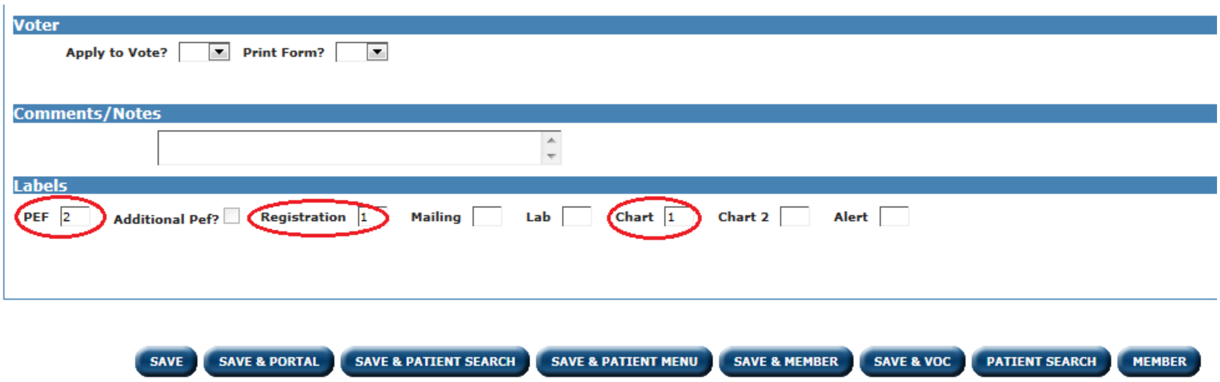


Labels

Information in the **Labels** section is: **PEF** (Patient Encounter Form)**, Additional PEF, Registration, Mailing, Lab, Chart, Chart 2,** and **Alert.**



- After selecting the quantities of each type of label to be printed, click one of the save buttons at the bottom of the screen.

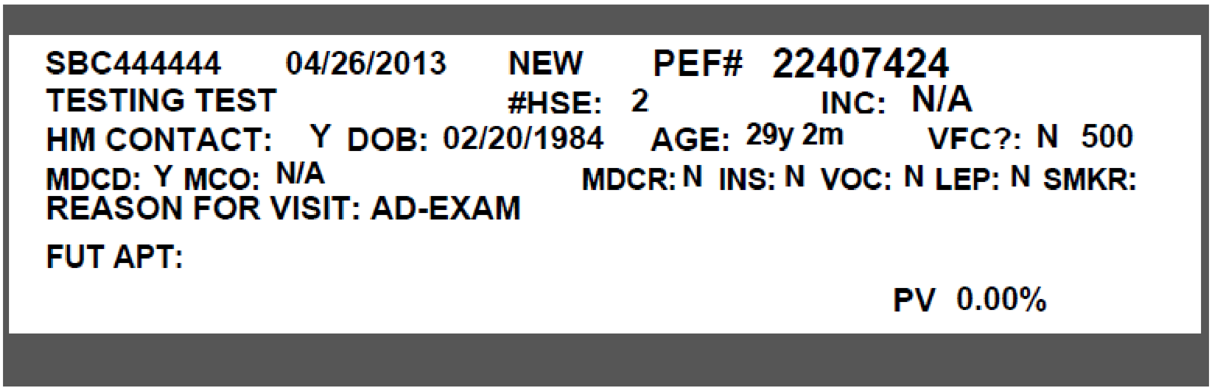


- To save data entered and return to the CDP Portal, click SAVE & PORTAL.
- To save information and search for another patient, click SAVE & PATIENT SEARCH.
- To save information and return to the Member screen, click SAVE & MEMBER.

Note that clicking Save & VOC is for out-of-state WIC VOCs only.

- A separate browser window appears with the label. Zoom in to enlarge the text, or print the label. Then close the window. An example is shown below.

Example:


SBC444444 04/26/2013 NEW PEF# 22407424
TESTING TEST #HSE: 2 INC: N/A
HM CONTACT: Y DOB: 02/20/1984 AGE: 29y 2m VFC?: N 500
MDCD: Y MCO: N/A MDCR: N INS: N VOC: N LEP: N SMKR:
REASON FOR VISIT: AD-EXAM
FUT APT:
PV 0.00%

5 HOUSEHOLD FUNCTIONS

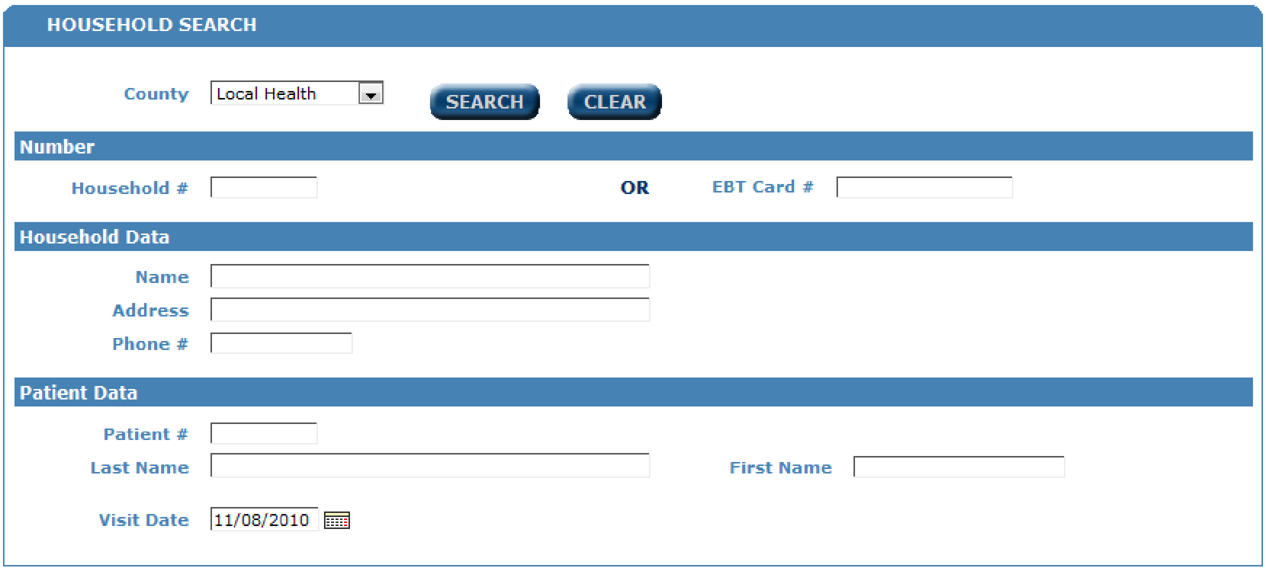
This section describes functions that can be performed at the household level. Patients may be grouped in a household to keep information in a common place for all patients in a household, as well as allow issuance to be divided among the household.

- To access the Household Search screen from the Portal, click Household *(Refer to* CDP Portal *in section 3 for more information).*

There are a number of search filters that can be used to search for a household from the **Household Search Screen**.

The search filter for "**County**" is a drop-down menu that is used to select the county in which the household is located. Most counties will already have this auto-filled. If a user has access to multiple counties, they may select one from a drop-down list.

- Left-click on the arrow and select a county from the list.

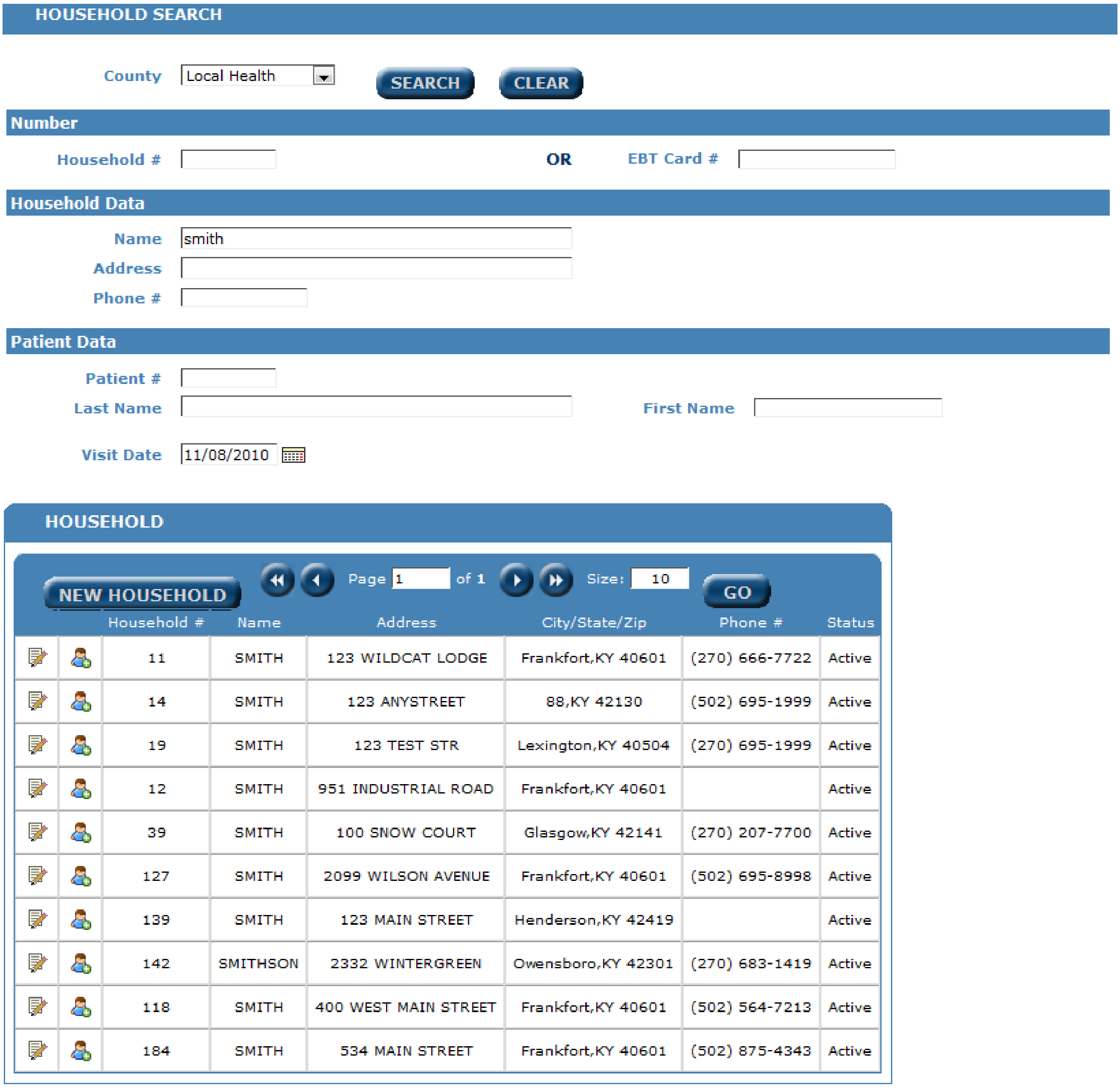


Enter information before clicking any buttons on this screen. Trying to perform a search without entering information will result in an error message that reads "no criteria entered".

From this screen, enter the **Household Number** or **eWIC Card Number**, **Name**, **Address**, or **Phone Number**. Information does not have to be entered for all fields to obtain results.

After filling in the boxes, click 

. A list of records will be displayed at the bottom of the screen. If the household is in the system, typing a household number instead of a household name will return a direct hit.



		Household #	Name	Address	City/State/Zip	Phone #	Status
		11	SMITH	123 WILDCAT LODGE	Frankfort,KY 40601	(270) 666-7722	Active
		14	SMITH	123 ANYSTREET	88,KY 42130	(502) 695-1999	Active
		19	SMITH	123 TEST STR	Lexington,KY 40504	(270) 695-1999	Active
		12	SMITH	951 INDUSTRIAL ROAD	Frankfort,KY 40601		Active
		39	SMITH	100 SNOW COURT	Glasgow,KY 42141	(270) 207-7700	Active
		127	SMITH	2099 WILSON AVENUE	Frankfort,KY 40601	(502) 695-8998	Active
		139	SMITH	123 MAIN STREET	Henderson,KY 42419		Active
		142	SMITHSON	2332 WINTERGREEN	Owensboro,KY 42301	(270) 683-1419	Active
		118	SMITH	400 WEST MAIN STREET	Frankfort,KY 40601	(502) 564-7213	Active
		184	SMITH	534 MAIN STREET	Frankfort,KY 40601	(502) 875-4343	Active

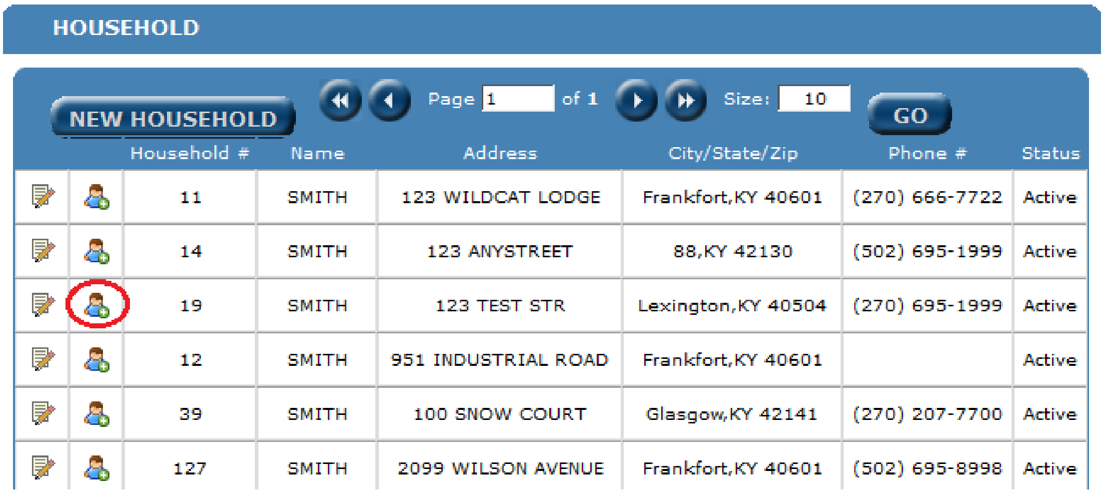
If the household is not on file, or an incorrect household number has been entered, the following message will be displayed, "The Household Number does not exist".

From the **Household Screen**, there are three options:

- View members and information for an existing household.
- Edit an existing household.
- Create a new household.

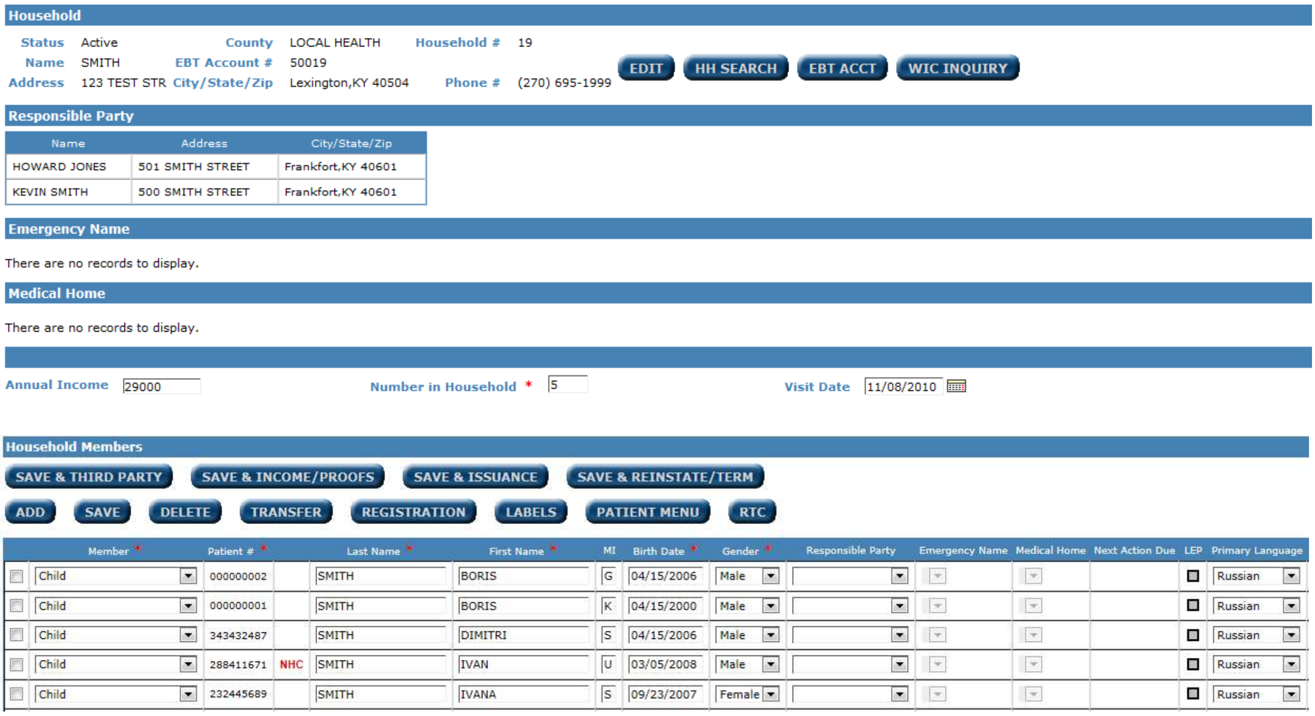
5.1 MEMBER SCREEN

The Member screen displays demographic information for all members, or patients, in a given household as well as a menu of options for each member. To access the Member screen from the Household Search screen in the previous section, click the Go to Member icon next to the household number.



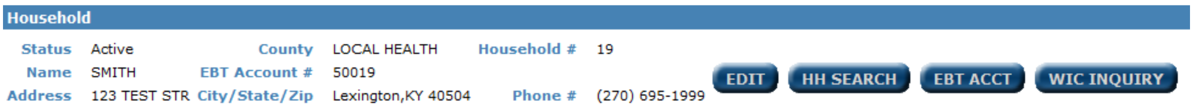
		Household #	Name	Address	City/State/Zip	Phone #	Status
		11	SMITH	123 WILDCAT LODGE	Frankfort,KY 40601	(270) 666-7722	Active
		14	SMITH	123 ANYSTREET	88,KY 42130	(502) 695-1999	Active
		19	SMITH	123 TEST STR	Lexington,KY 40504	(270) 695-1999	Active
		12	SMITH	951 INDUSTRIAL ROAD	Frankfort,KY 40601		Active
		39	SMITH	100 SNOW COURT	Glasgow,KY 42141	(270) 207-7700	Active
		127	SMITH	2099 WILSON AVENUE	Frankfort,KY 40601	(502) 695-8998	Active

The Member screen will be displayed.



Member Screen

The first section of the **Member screen**, as shown below, has general **household** information: **Status, County, Household #, Name, EBT Account #, Address, City/State/Zip,** and **Phone #**.



- To update any of the general household information, click EDIT *(Refer to 5.1.8).*

****Note: Some changes made while editing an existing household only apply to the household as a whole. Changing the household Name does not change the individual member's name.*

- To return to the Household Search screen, click HH SEARCH *(Refer to 4.1* Household Search & Patient Search Screen*)*

- To view the Household's EBT Account, click **EBT ACCT** which is linked to the Household's Account Details screen in the EBT System *(Refer to 5.1.5.1)*.

- To view the Household's WIC Inquiry Report, click **WIC INQUIRY**. A separate window will pop up and display the household's WIC information divided into sections for each household member. An example is shown on the following page.

Responsible Party

The next section of the Member screen, as shown below, has **Responsible Party** Information: The Responsible Party's Name, Address, and City/State/Zip. The Responsible Party is the contact who will be responsible for members in the household. There may be more than one Responsible Party per household.

Responsible Party

Name	Address	City/State/Zip
MINIE MOUSE		Frankfort,KY 40604
MICKEY MUSE		Frankfort Heights,IL 62840

Emergency Names

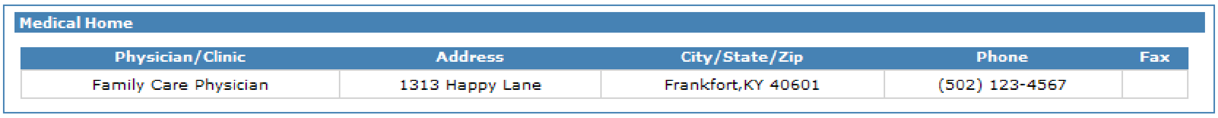
The next section of the Member screen, as shown below, has **Emergency Names** and **Phone Numbers**. An Emergency Name is the contact who should be notified in the event of an emergency, such as a doctor. There may be more than one Emergency Name per household.

Emergency Name

Name	Phone Number
DR DAVIS	(502) 555-9999

Medical Home

The next section displays **Medical Home** (Primary Care Physician) information.


Medical Home

Physician/Clinic	Address	City/State/Zip	Phone	Fax
Family Care Physician	1313 Happy Lane	Frankfort,KY 40601	(502) 123-4567	

Member Reason for Visit

****Note: This function is currently under development.*

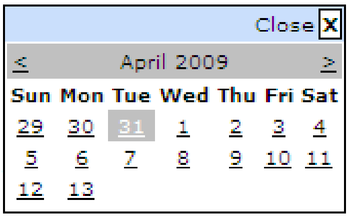
The next section displays **Member Reason for Visit** information. This gives details as to why the household member visited the clinic, and the length of the visit. To edit information, click .

Edit Member Reason for Visit

The first panel on the **Reason for Visit** screen displays general information for that particular household: **County, Household number, Name, Address, City/State/ Zip,** and **Phone Number**.

The second panel, **Visit Information**, displays the Visit Date.

- The date will be automatically filled with today's date. To change the **Visit Date**, left-click on the calendar icon  and select a date, or key in a date.

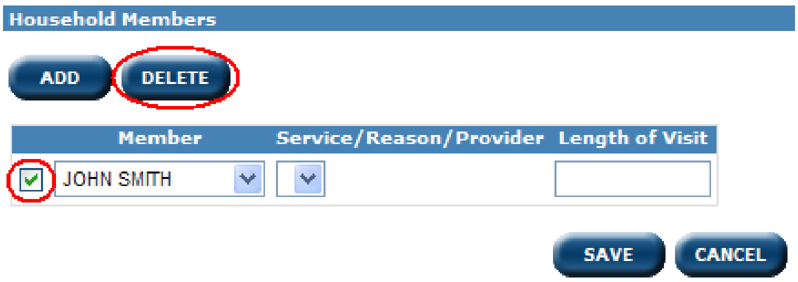


The third panel, **Household Members**, displays each Member and reason for visit.

- To add a Member Reason for Visit, click . Use the drop-down menus to select a **Member**, and a **Service/ Reason/ Provider**. Then type the length of the visit in the **Length of Visit** box.

- To save the Member Reason for Visit, click .
- To cancel without saving changes, click .

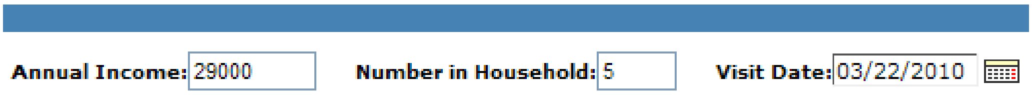
- To delete a previous entry, select the  next to the Member's name, and then click .



Household Income

Members screen

The next section displays **Household Income** information: annual **Income** (total for the household), **Number in Household**, and **Visit Date**.



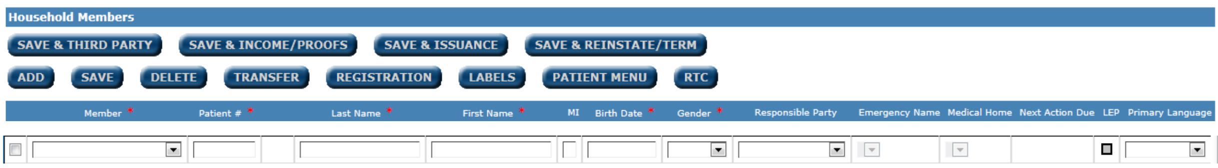
Household Members Section

The last section displays the **Household Members** and a menu of options: **Save & Third Party** Information, **Save & Income/Proofs** Information, **Save & WIC Issuance**, **Save & Reinstate/Terminate, Add** members, **Save**, **Delete** members, **Transfer** members, **Registration** screen, print **Labels**, go to **Patient Menu**, and **RTC** (Return to Clinic).

5.1.1 ADD MEMBER

To add a member from the Member screen, click .

A new row will appear in the grid below the menu of buttons, with blank fields for entering data for the patient.

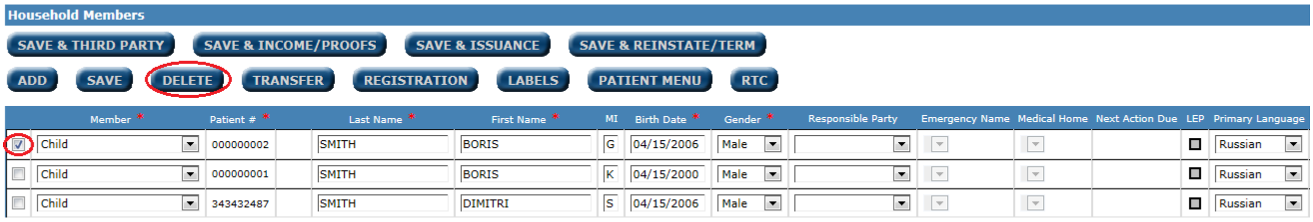


- Use the drop-down menu to select a Member status for the patient (ex: Primary Member, Child, Cardholder Member, etc.). Enter the Patient #, Last Name, First Name, Middle Initial, and Birth Date in the appropriate fields. Use the drop-down menus to select the Gender, Responsible Party, Emergency Name, Medical Home (Primary Care Physician), and Primary Language.
  - To save any changes made, click SAVE.

5.1.2 DELETE MEMBER

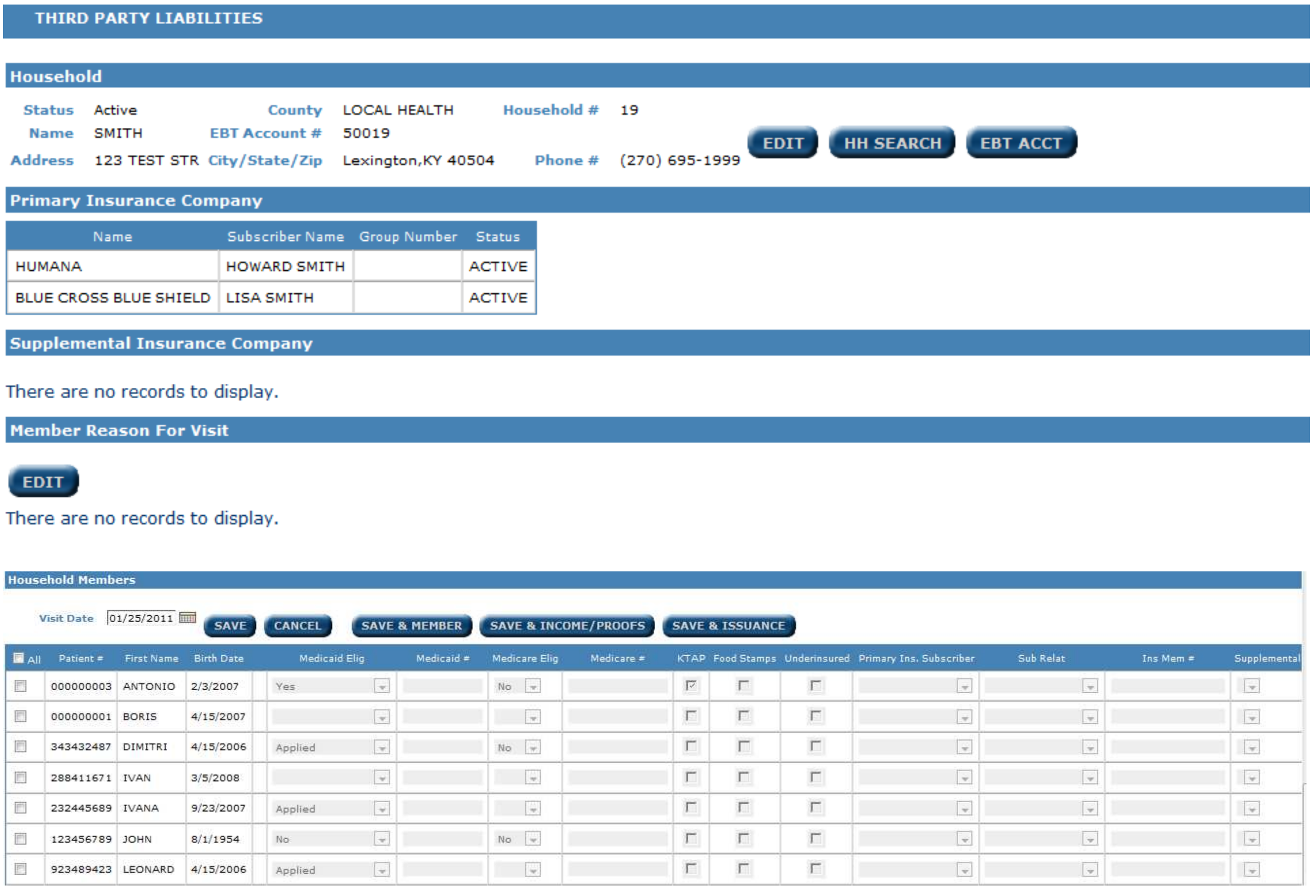
To delete a member, select the ☐ next to the Member's name, and then click DELETE. An example is shown below.

Example:



5.1.3 THIRD PARTY INFORMATION

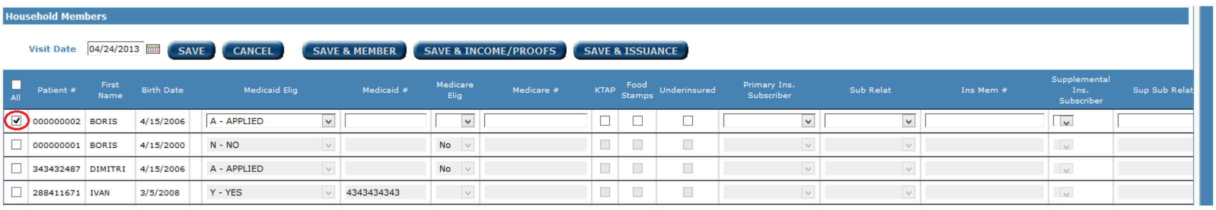
From the Household Members screen, to save and view third party information, click SAVE & THIRD PARTY. The Third Party Liabilities screen will be displayed.



This screen contains information on: General Household Information, Primary Insurance Company, Supplemental Insurance Company, Member Reason for Visit, and Household Members information.

- To edit any of the Third Party information for a member, select the ☐ next to a members name and fields for eligibility will become editable.

Example:

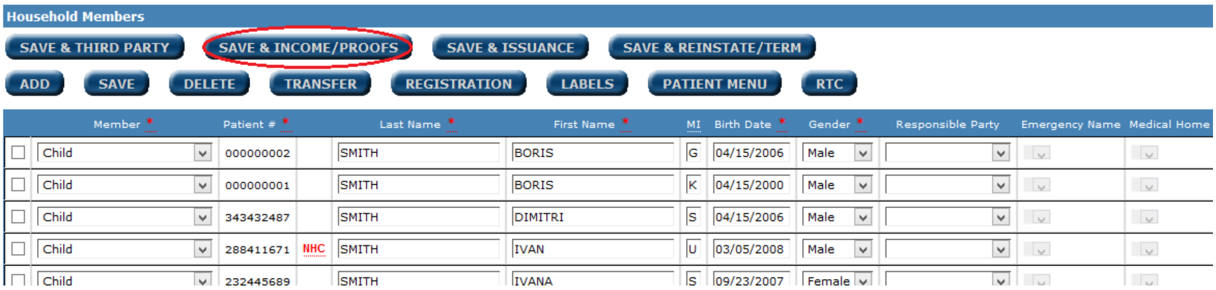


**Refer to WIC Procedures Section, 1.4 WIC Registration*

5.1.4 INCOME/PROOFS

To save information entered and view income/proofs information from the Member screen, click 

.



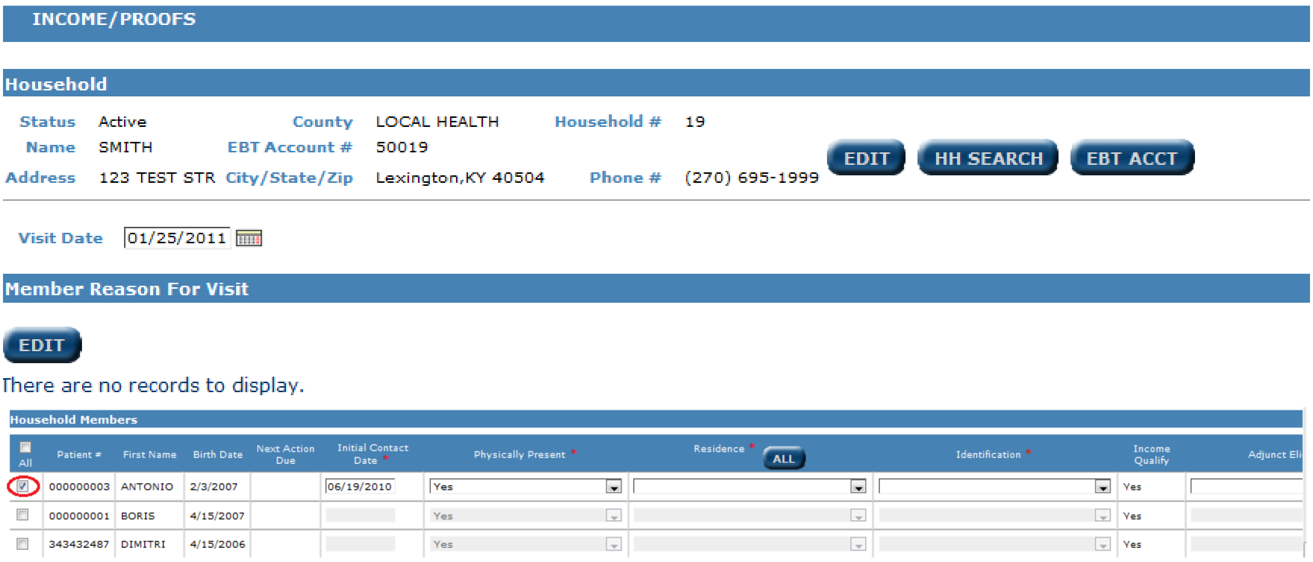
The Income/Proofs screen includes: General Household Information, Visit Date, Member Reason for Visit, Income Assessment, Salaried Income/Wages, and Other Income. There are drop-down menus corresponding to each household member.

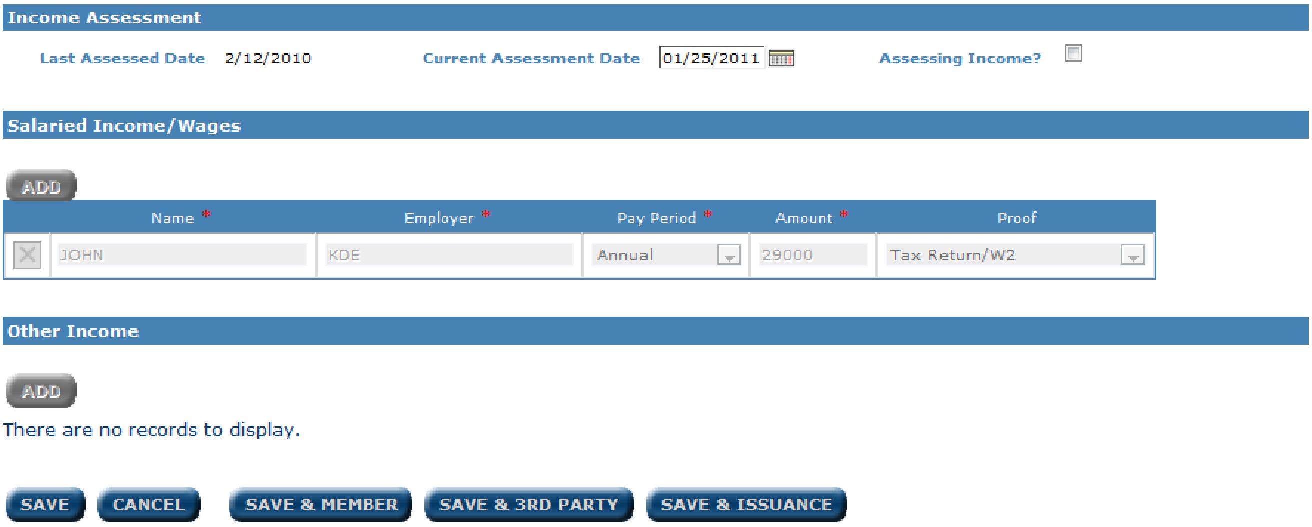
- Checking the box next to a member's Patient # will open up the fields to enter or edit the member's Adjunct Eligibility and proofs.

*****Note: The screen extends beyond the width of the page. To see the rest of the screen, use the scroll bar at the bottom of the screen.*

- Each member can be selected to edit information individually, or select 

to edit all members of the households' information at once.





- Under the Income Assessment panel, use the calendar icon or manually enter the Current Assessment Date (Today's date will automatically be filled in). If the income is being assessed, check the box next to Assessing Income. Once the box has been checked, the Salaried Income/Wages panel will no longer be grayed out and the income information can be entered.
- To save information entered and go to the WIC Issuance screen, click SAVE & ISSUANCE. *(Refer to section 5.1.5 for more information).*

**Refer to WIC Procedures Section, 1.4 WIC Registration*

5.1.5 WIC ISSUANCE

To save information and view WIC Issuance from the Household Member screen, click SAVE & ISSUANCE. The WIC Benefits Issuance screen will be displayed.

Household Members

All	Patient #	Name	Next Action Due	FMNP	Last FP	Next Issuance Due	Next FP	Months To Issue	Cert Label Only?
	000000034	BABY A SMITH				12/13/2012			
	000000002	BORIS G SMITH		NO		12/13/2012	CB		
	000000001	BORIS K SMITH				12/13/2012			
	343432487	DIMITRI S SMITH		NO		12/13/2012	CB		
	288411671	IVAN U SMITH		NO		12/13/2012	CA		
	232445689	IVANA S SMITH		NO		12/13/2012	CB		
	923489423	LEONARD K SMITH		NO		12/13/2012	CB		
	343424335	MARLENA E SMITH		NO		12/13/2012	CB		
	790909099	MASHA Y SMITH		NO		12/13/2012	CB		
	434343432	NATASHA S SMITH		NO		12/13/2012	CB		

PREVIEW BENEFITS ISSUE BENEFITS CANCEL

- Use the drop-down menu to select the Clinic. Enter the Issue Date and Issue Day. Use the Identification drop-down menu to select the method of Identification.

- To issue benefits to an eligible member, check the box next to the Patient # benefits are being issued to. Use the drop-down menu to select the number of Months to Issue.

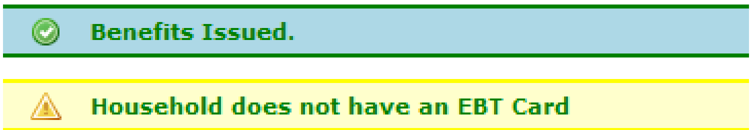
****Note: If a member is ineligible the checkbox next to their Patient # will be grayed out.*

	434343432	NATASHA S SMITH		NO		1/26/2011	CB	
☑	343423545	OKSANA R SMITH	Recertification	NO		1/26/2011	CB	1 month 2 months 3 months
	288411670	OLEG N SMITH		NO		1/26/2011	CB	
	342343256	PETYA D SMITH		NO		1/26/2011	CB	
	657676767	SVETLANA L SMITH				1/26/2011		

- After selecting the number of Months to Issue, the benefits can be previewed by clicking PREVIEW BENEFITS. If the information is correct, click ISSUE BENEFITS.

**Refer to WIC Procedures Section, 1.1 WIC Benefits and 1.3 WIC Labels*

After issuing benefits from the WIC Benefits Issuance screen, if the household has not yet been assigned an eWIC card, a message will be displayed at the bottom of the screen.



An EBT Card button is displayed at the top of the screen for households that do not have an eWIC card. To issue an eWIC card, click 

.

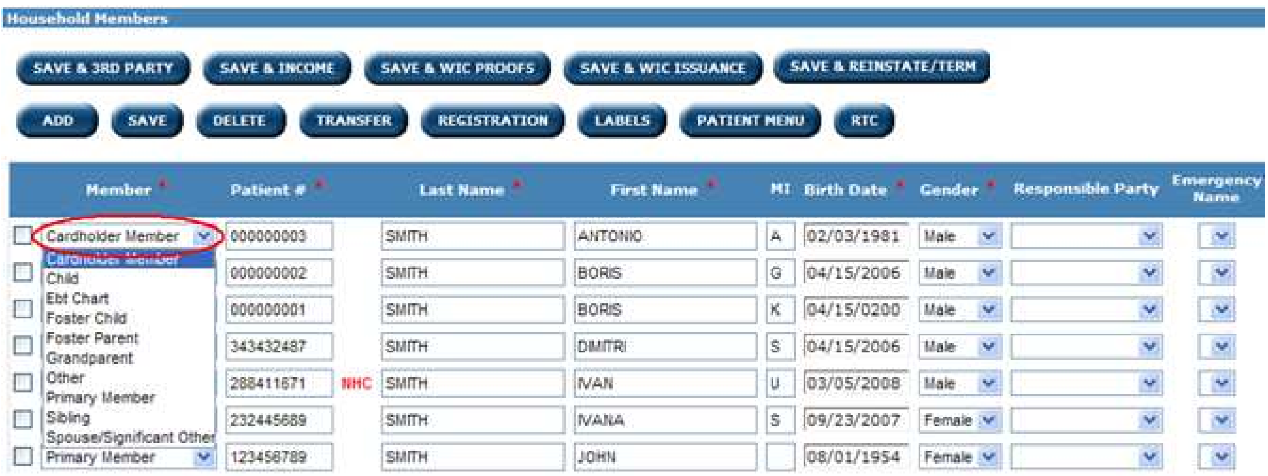
5.1.5.1 EWIC CARD ISSUANCE

eWIC cards are issued to patients, or households, and contain benefits available to purchase WIC food items at participating stores. Items may be purchased as needed, and the balance will remain on the card until the issuance period ends.

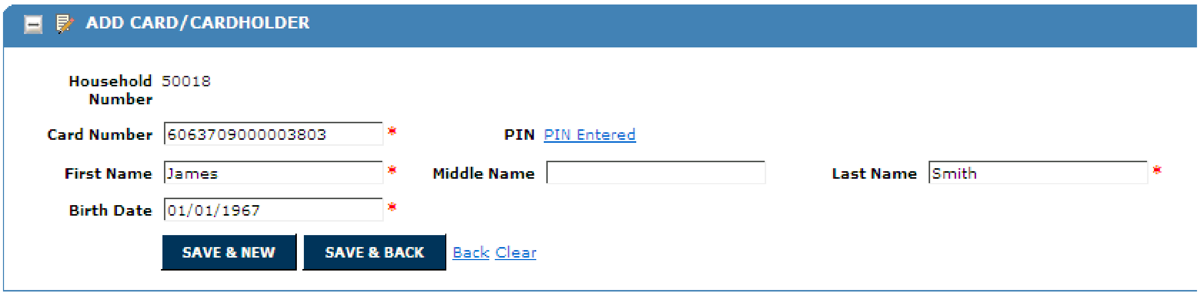
5.1.5.1.1 ADDING AN EBT CARDHOLDER

Adding a Cardholder to a Household (where cardholder is a household member)

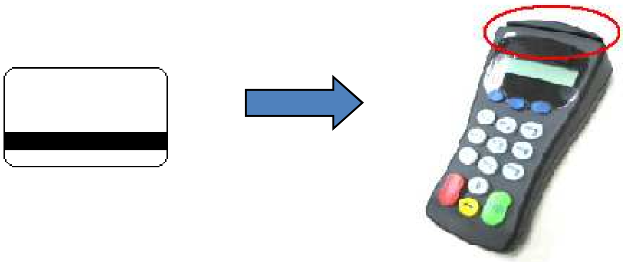
- From the Member screen, select the Cardholder Member for the Household using the drop-down menu item beside the Patient name, then click the Save & Issuance button.



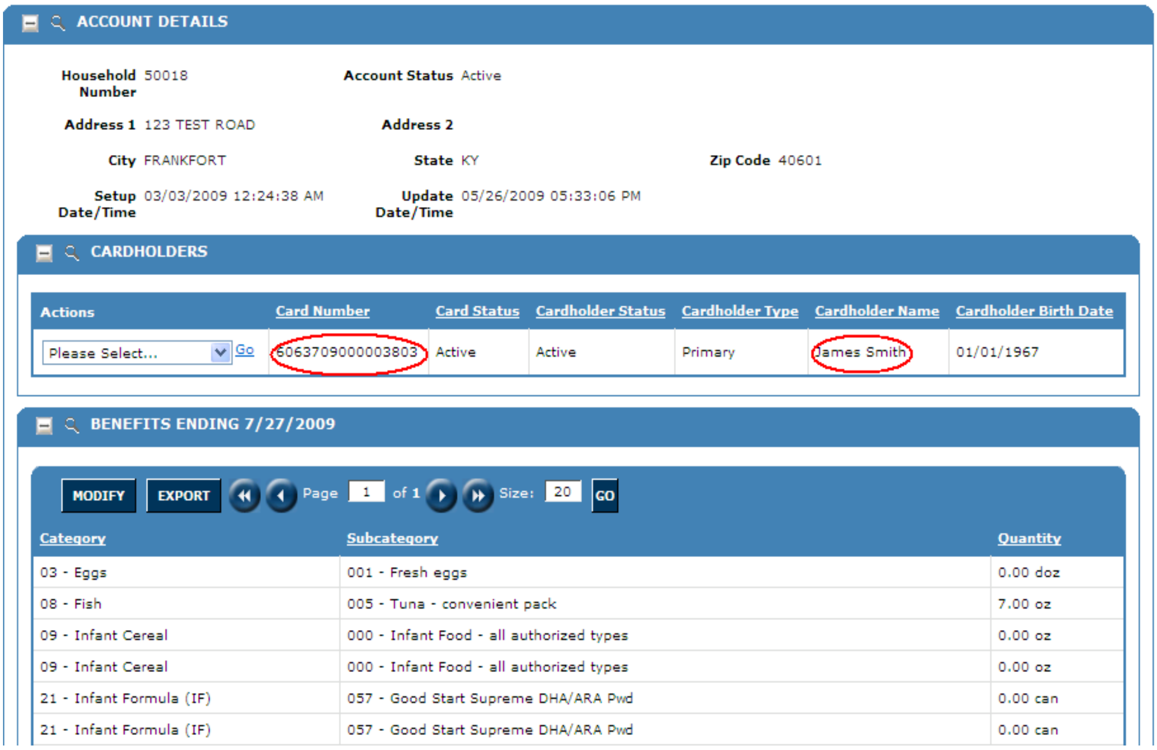
- From the WIC Benefits Issuance screen, click the EBT Card button at the top right corner of the screen. The Add Card/Cardholder screen will be displayed.



- Click in the Card Number field. The six-digit BIN number will appear.
- Select the next eWIC card from the clinic card inventory. Swipe the card through the PIN pad/card reader. The card number will automatically appear in the Card Number field.



- Click in the PIN entry field. Ask the participant to enter a 4-digit PIN number. Have them confirm/re-enter that number. Note that when the PIN Enter PIN link is clicked, it changes to waiting and a 30-second timeout period is allowed to enter and re-enter a PIN.
- The PIN PIN Entered message will be displayed in the PIN field.
- The cardholder name and birth date is auto-filled when the cardholder is designated on the Member screen. Click the SAVE & BACK button to save the information and view the Account Details screen (Household #50018 is shown below). To return to the CMS Household screen, close the Account Details screen.

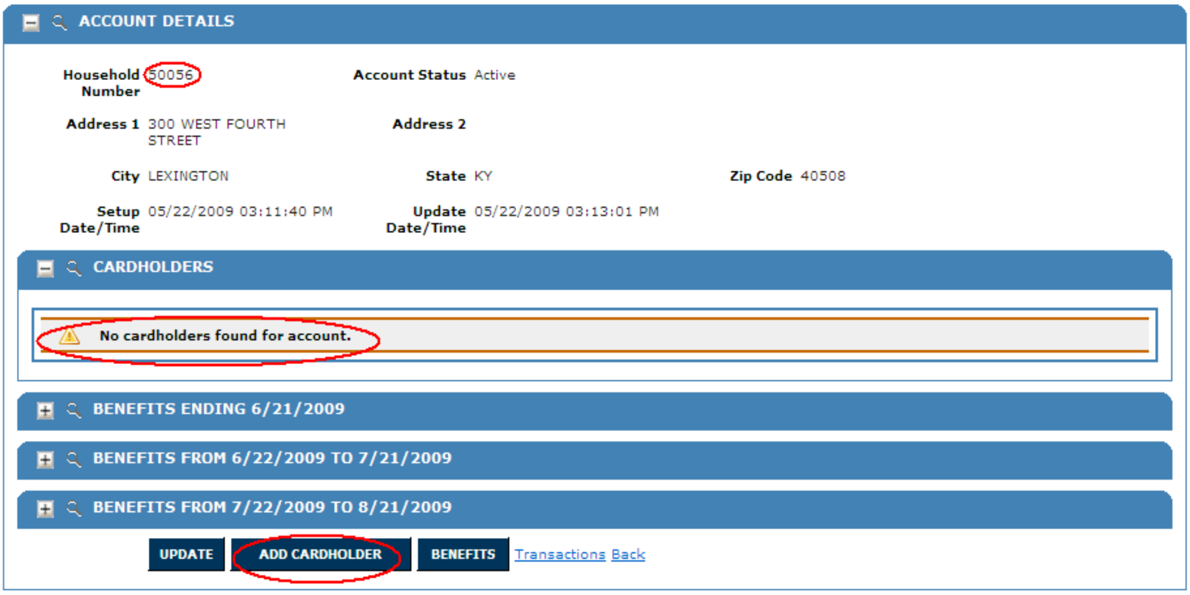


Adding a Cardholder to an Account (when cardholder is not a household member)

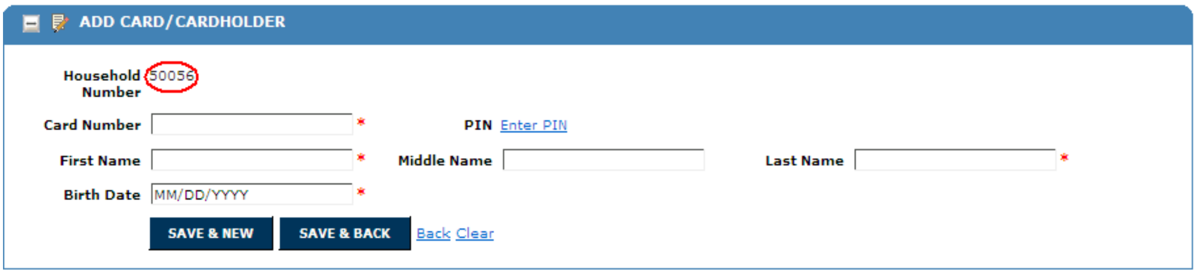
- The same process as explained where a cardholder is a household member can be done, but the Name and Birth Date must be entered on the Add Card/Cardholder screen.
- There is another method for adding a cardholder who is not a household member. From the Household Member screen, click the EBT ACCT button in the top right portion of the screen.

****Entire screen not displayed.*

- The Account Details screen for the household is shown below (Household #56 is displayed). The benefits for the household are displayed in the three panels at the bottom of the screen. Note the "No cardholders found for the account" message. Click the ADD CARDHOLDER button.



- The Add Card/Cardholder screen will be displayed as shown below. Add the required information for the cardholder and click the Save and Back button to return to the Account Details screen. The cardholder name will now be displayed. Close the Account Details screen to return to the WIC Benefits Issuance screen.



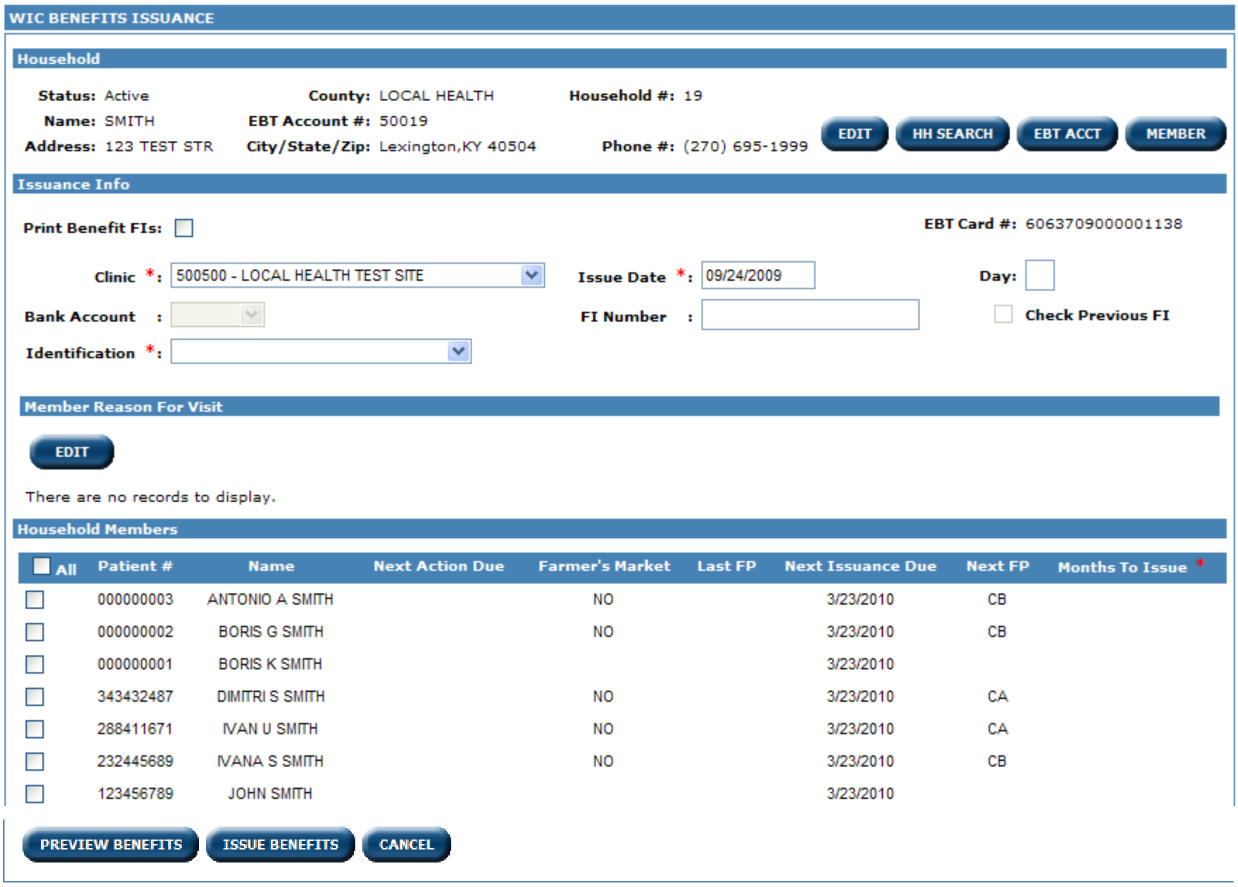
5.1.5.1.2 CHANGING CARDHOLDERS

Member screen

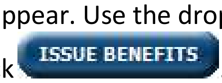
- To change a cardholder from the Member screen, use the drop-down menu to designate a member as a Cardholder Member. Note that the Name and Birth Date must also be changed on EBT from the Add Card/Cardholder screen.

- There can only be one Cardholder Member per household. If a previous cardholder member was selected, use the drop-down menu to change their member status (Primary Member, Foster Parent, Other, etc.).

After an eWIC card has been assigned to the household, close out of the EBT browser window. The Issuance screen will still be displayed.



- Use the drop-down menus  to select the Clinic and Identification type. Enter the issue date.

- Select a single patient, multiple patients, or all . Once a patient is selected, a field for Months to Print will appear. Use the drop-down menu  to select a number of months, and then click .

After benefits have been successfully issued, the following message displayed at the bottom of the screen:

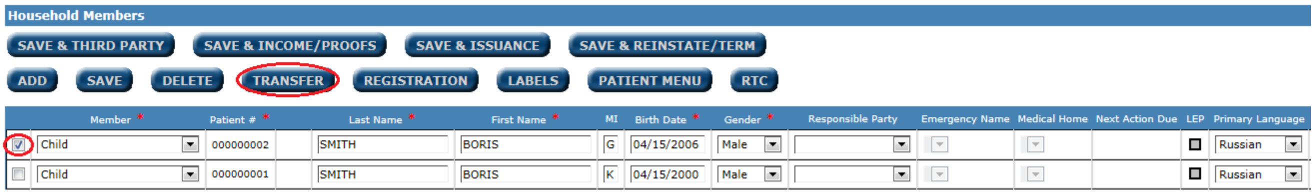
- To return to the Member screen, click MEMBER.

5.1.6 TRANSFERRING MEMBERS

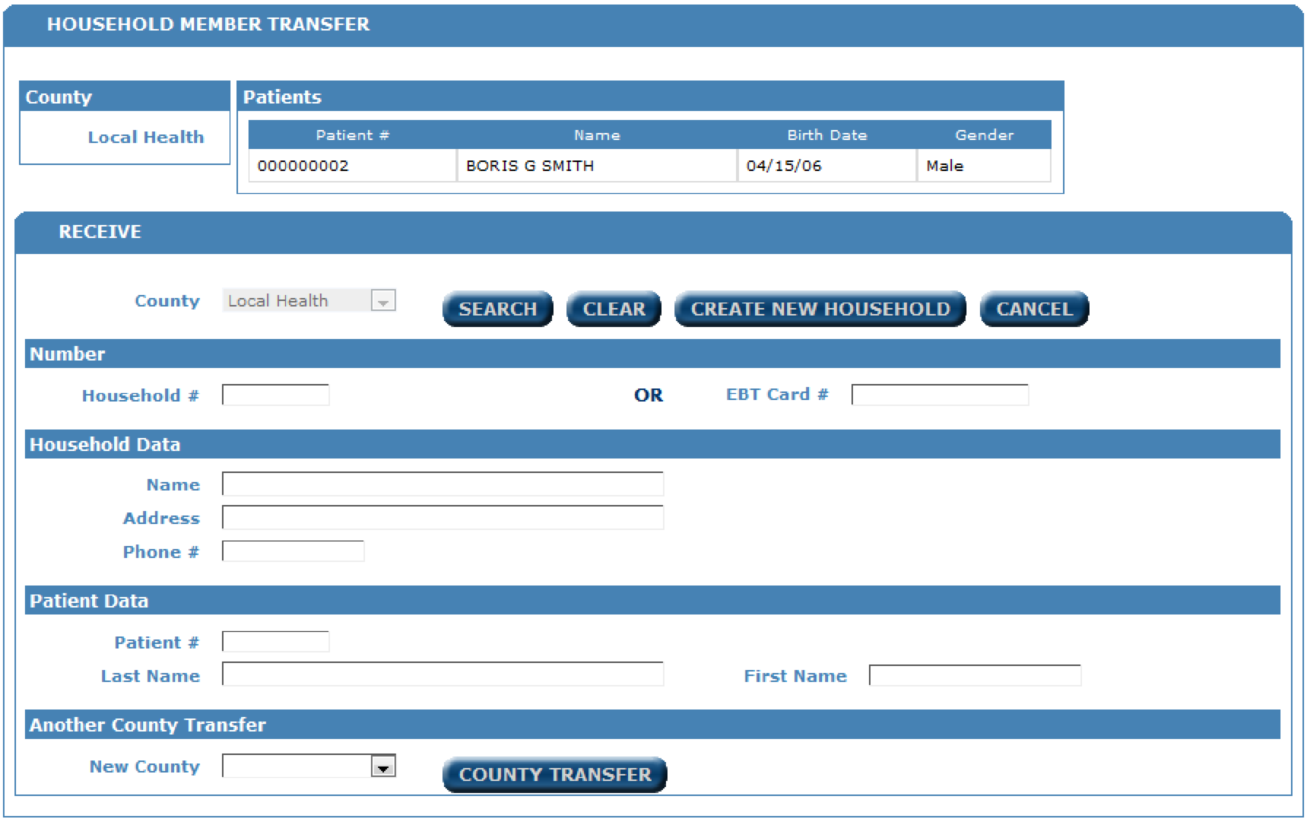
Household members can be transferred to another household in the same county, or to a household in another county. Whole households can be transferred to other counties, and members can be transferred to a new household.

5.1.6.1 TRANSFERRING A MEMBER TOA DIFFERENT HOUSEHOLD

To transfer a member to another household in the same county, select the ☐ next to the Member's name, and then click TRANSFER at the bottom of the Member screen.

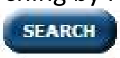


Household Transfer screen



Transferring a Member to a Different Household

The Household Transfer screen will display the patient's current county and personal information (Patient #, Name, Birth Date, and Gender) at the top of the screen.

- A household can be found by searching by Household #, eWIC card #, Name, Address, Phone #, Patient #, or name and clicking 

.

A list of households will be displayed. To select a household for the member to be transferred to, left-click on the  next to the desired household number, or click 

.

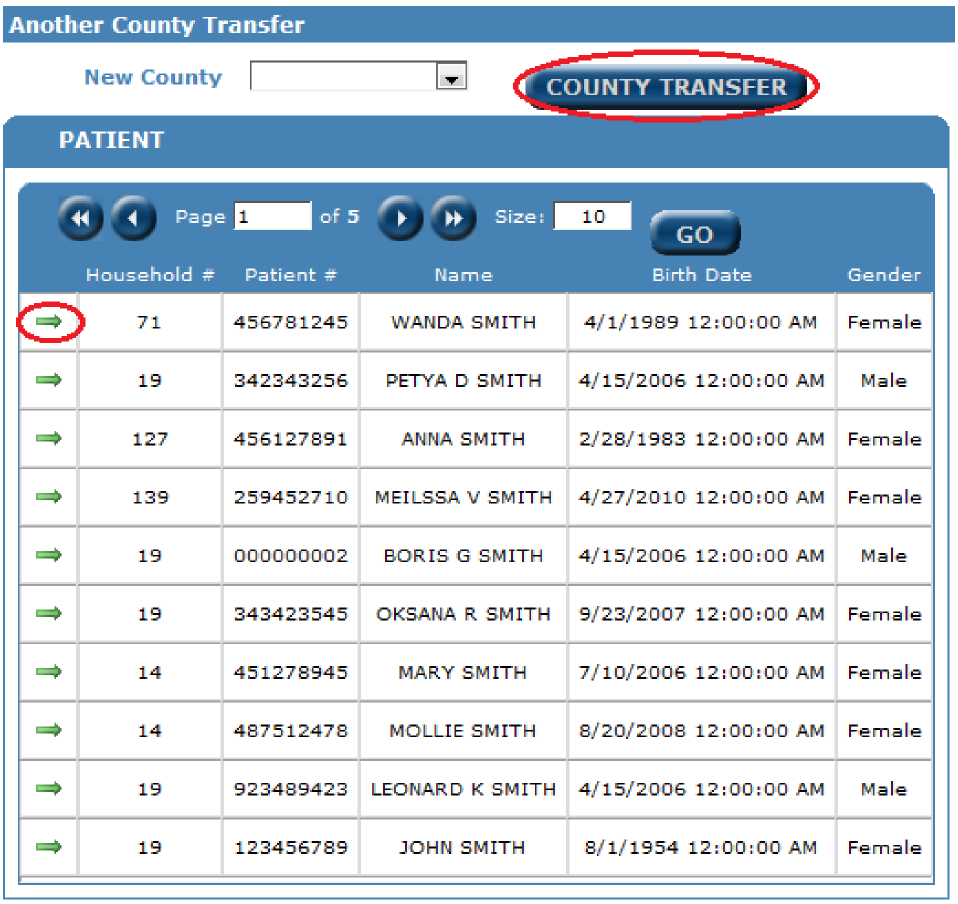
The patient's new household Member screen will be displayed. Check the Member section at the bottom of the screen to see that the patient was successfully transferred.

5.1.6.2 TRANSFERRING A HOUSEHOLD OR PATIENT TO A DIFFERENT COUNTY

Transferring a Household to a Different County

To transfer a household to a different county, left-click the arrow on the drop-down menu  and select a new county, then click 

at the bottom of the Transfer screen.

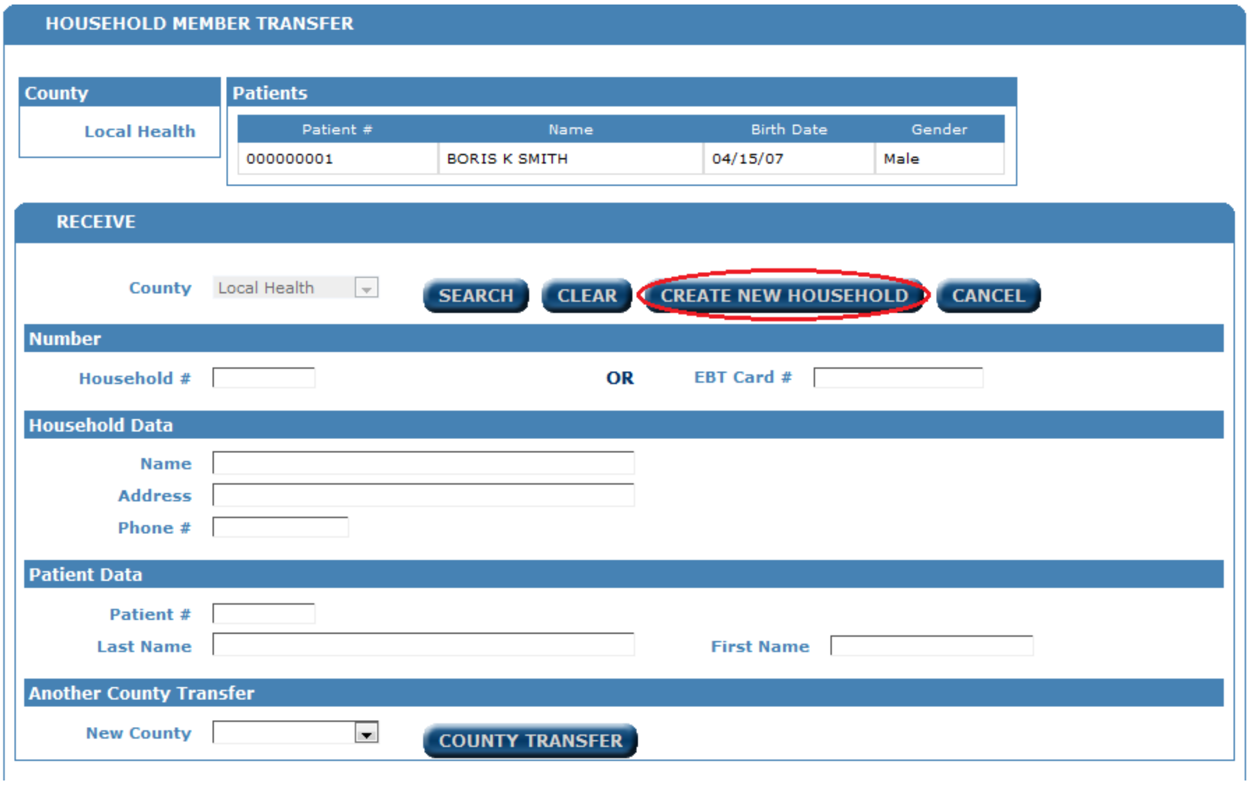


	Household #	Patient #	Name	Birth Date	Gender
	71	456781245	WANDA SMITH	4/1/1989 12:00:00 AM	Female
	19	342343256	PETYA D SMITH	4/15/2006 12:00:00 AM	Male
	127	456127891	ANNA SMITH	2/28/1983 12:00:00 AM	Female
	139	259452710	MEILSSA V SMITH	4/27/2010 12:00:00 AM	Female
	19	000000002	BORIS G SMITH	4/15/2006 12:00:00 AM	Male
	19	343423545	OKSANA R SMITH	9/23/2007 12:00:00 AM	Female
	14	451278945	MARY SMITH	7/10/2006 12:00:00 AM	Female
	14	487512478	MOLLIE SMITH	8/20/2008 12:00:00 AM	Female
	19	923489423	LEONARD K SMITH	4/15/2006 12:00:00 AM	Male
	19	123456789	JOHN SMITH	8/1/1954 12:00:00 AM	Female

5.1.6.3 TRANSFERRING TO A NEW HOUSEHOLD

To Transfer a Patient to a New Household from the Transfer screen, click 

.

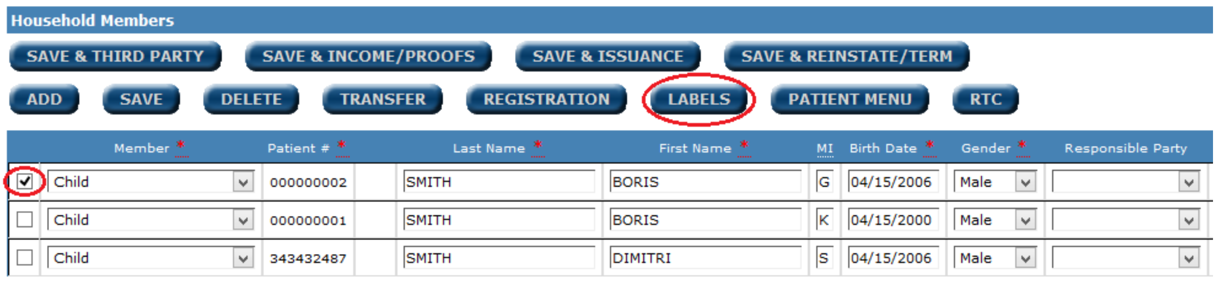


The Add Household screen will be displayed. Refer to Creating a New Household for more information.

Clicking CANCEL will return to the **Member** screen.

5.1.7 LABELS

To create labels for a patient in the household, check the box corresponding to the household member, then click LABELS.

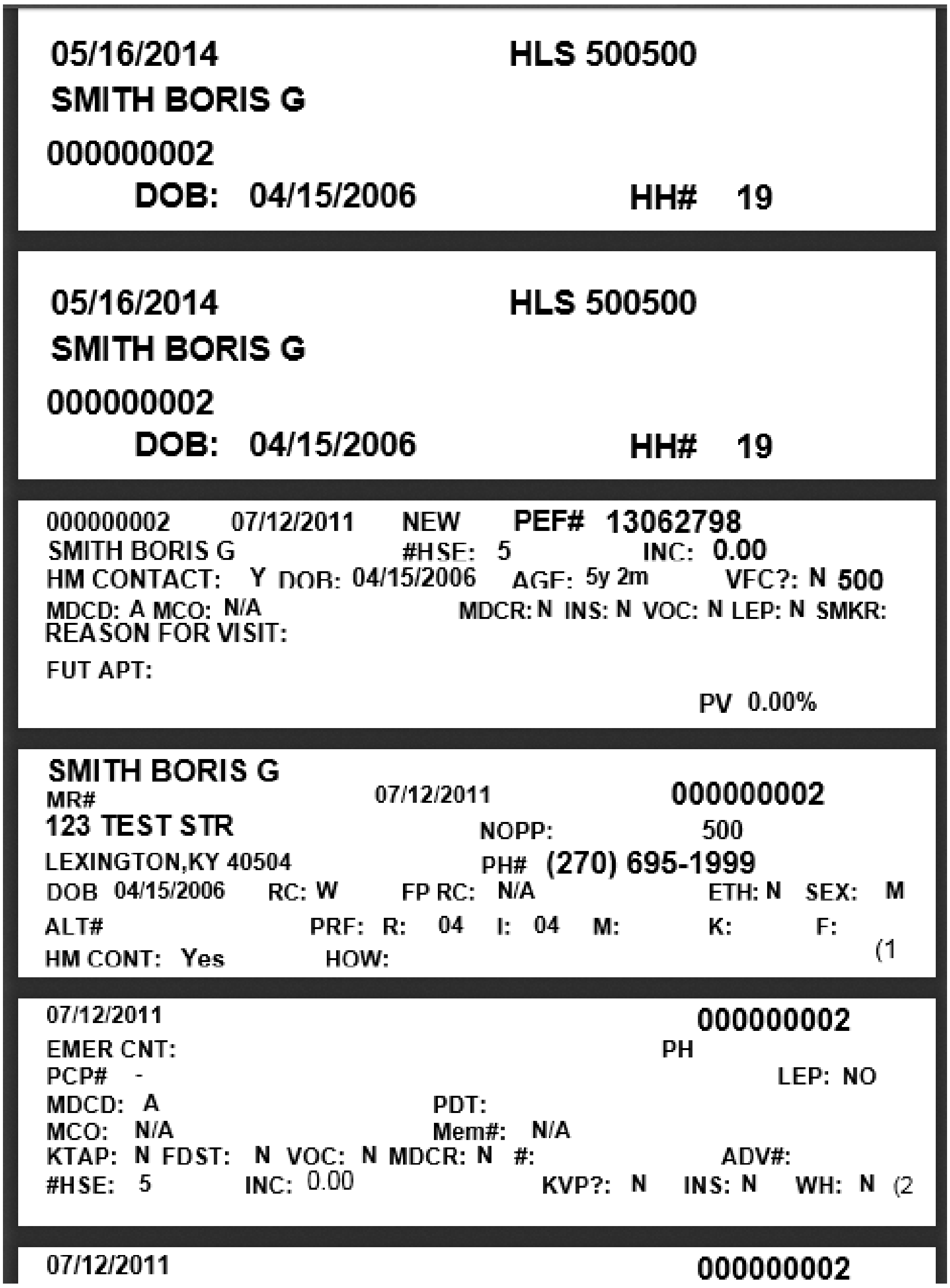


A pop-up window will appear with the various labels that can be created: PEF (Patient Encounter Form), Additional PEF, Registration, Mailing, Lab, Chart, Chart 2, and ACH-58. Manually enter the number of each label to be printed in the field corresponding to the label, then click 

.

A PDF of the labels created will pop up in a new window. The labels can be printed from this screen.

Example:



After the labels have been created, close out of the window and click  in the "Create Labels" window to return to the Members screen.

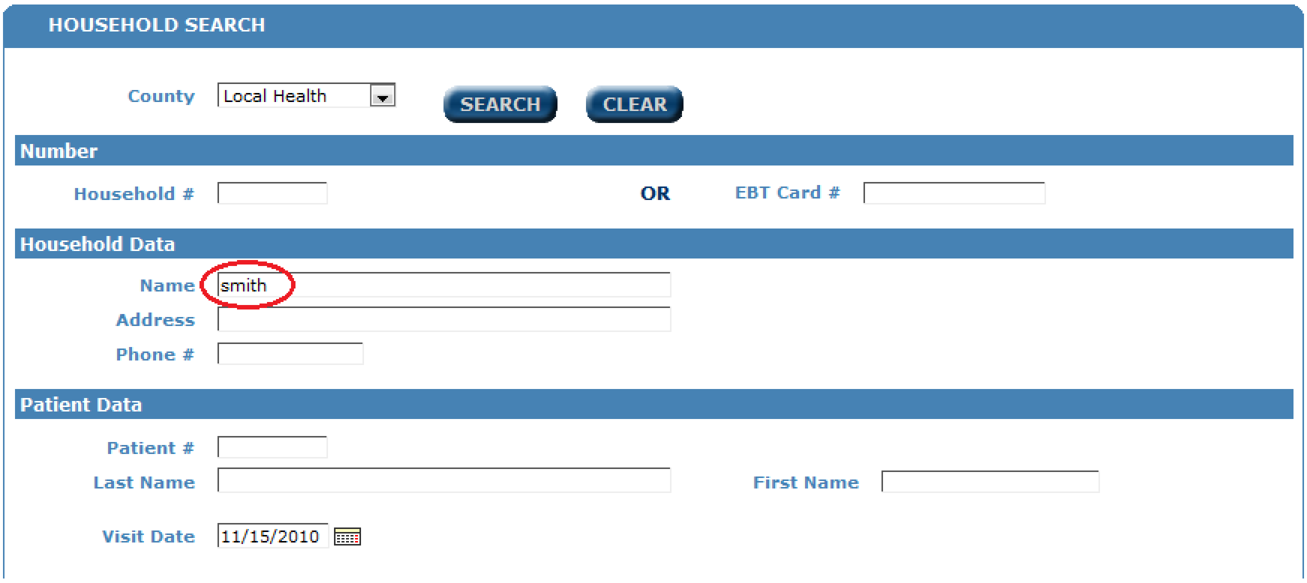
5.1.8 EDITING A HOUSEHOLD

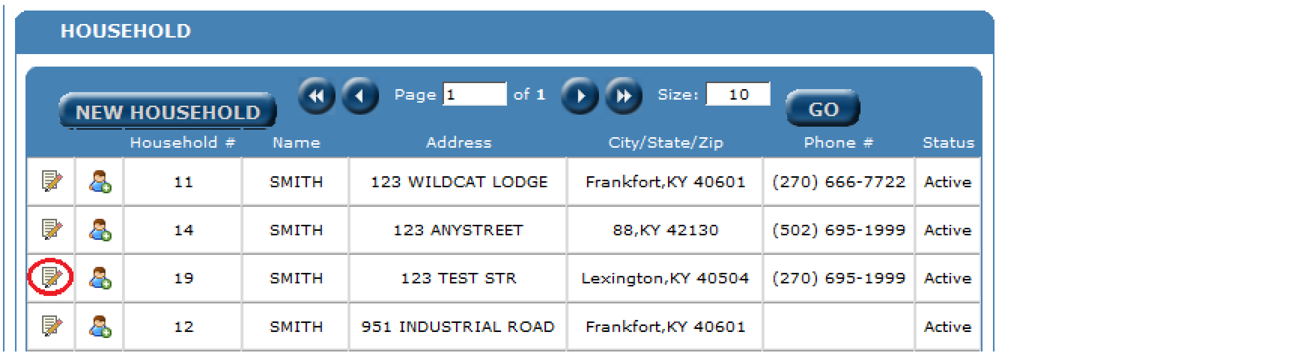
Household Search screen

From the Household Search screen, enter the **Household Number**, **Name**, **Address**, **Phone Number**, or **eWIC Card Number**. Entering as many of these fields as possible will narrow the results, but only one field is needed to perform a search.

After filling in the boxes with the corresponding answers, click SEARCH. A list of records will be displayed at the bottom of the screen. Typing a household number instead of a household name will return a direct hit if the household is in the system.

- To edit an existing household, click the Edit icon next to the household number.





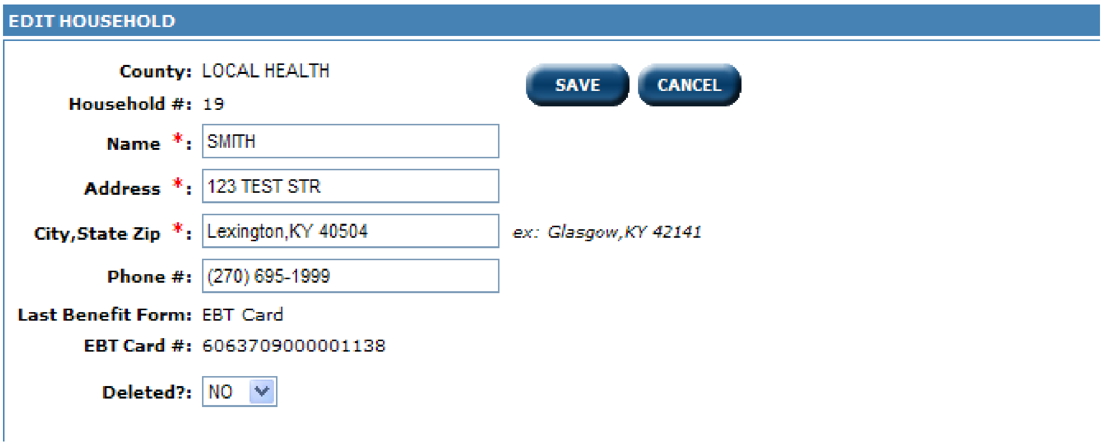
The **Edit Household** screen, shown on the following page, will be displayed.

Edit Household Screen

Household Search screen

General Household Information

The first section of the Edit Household **screen**, as shown below, is general household information: County, Household #, Name, Address, City/State/Zip, Phone #, EBT Card #, and Deleted (Yes/No).



****Note: Any search filter with an asterisk (*) is required.*

- To change information in any of the entries, highlight the current entry, and delete it. Enter new information.
- To save information entered and return to the Member screen, click SAVE.
- To return to the Household Search screen without saving changes, click CANCEL.

Responsible Party

The next section, as shown below, is the **Responsible Party** section. The Responsible Party is the person(s) who will be held responsible for the household member(s). There may be multiple Responsible Parties per household, but only one per member.

Responsible Party

ADD

	First Name *	MI	Last Name *	Address *	City/State/Zip *
X	HOWARD		HUGHES	144 MAIN STREET	Frankfort,KY 40601
X	KEVIN	D	KRING	344 ANYSTREET	Frankfort,KY 40601
X	JANET		JOHNSON	123 MAIN STREET	Frankfort,KY 40601

- To edit a previous entry, highlight the information with the cursor, delete the entry, and type new information.
- To add a Responsible Party, click ADD. Type the Responsible Party's **First Name**, **MI** (Middle Initial), **Last Name**, **Address**, and **City/ State/ Zip**.

Emergency Name

The next section, as shown below, is the **Emergency Name** section. This is the name of the person who should be contacted in the event of an emergency.

Emergency Name

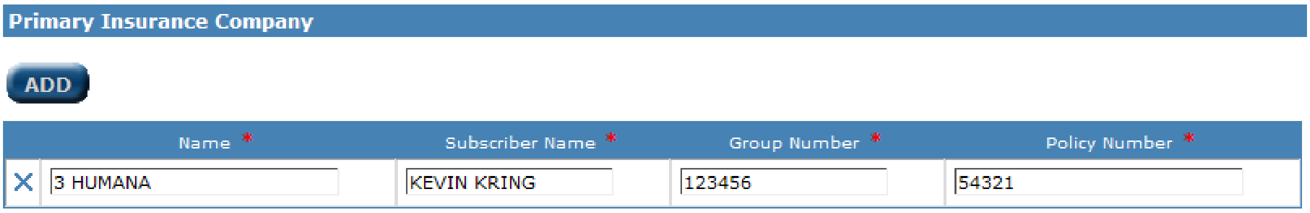
ADD

	Name *	Phone Number *
X	JAMES MADISON	(502) 695-1978
X	TUBBY SMITH	(502) 695-1999

- To edit a previous entry, highlight the information with the cursor, delete the entry, and type new information.
- To add an **Emergency Name**, click ADD. Type the contact's **Name** and **Phone Number**.

Primary Insurance Company

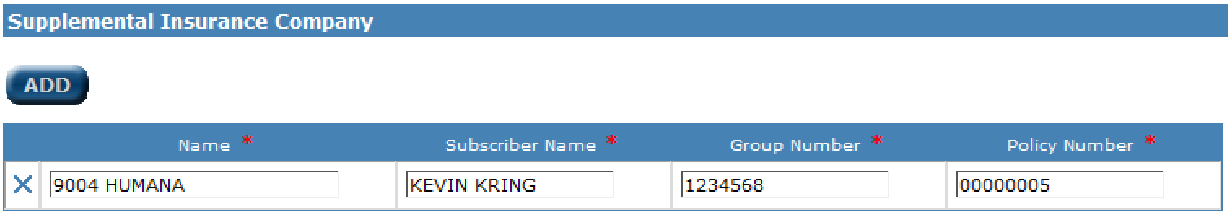
The next section, as shown below, is the **Primary Insurance Company** section.



- To edit a previous entry, highlight the information with the cursor, delete the entry, and type new information.
- To add a Primary Insurance Company, click ADD. Type the Insurance Company's **Name**, **Subscriber Name**, **Group Number**, and **Policy number**.

Supplemental Insurance Company

The next section, as shown below, is the **Supplemental Insurance Company** section.



- To edit a previous entry, highlight the information with the cursor, delete the entry, and type new information.
- To add a Supplemental Insurance Company, click ADD. Type the Insurance Company's **Name**, **Subscriber Name, Group Number, and Policy Number**.

Medical Home

The next section, as shown below, is the **Medical Home** (Primary Care Physician) section.

- To edit a previous entry, highlight the information with the cursor, delete the entry, and type new information.
- To add a Medical Home, click ADD. Type the **Physician/ Clinic Name**, **Address**, **City/ State/ Zip**, **Telephone Number**, and **Fax Number**.

After edits are made, there are three options:

- To save changes and go to the Member screen, click SAVE.
- To return to the Household Search screen without saving changes, click CANCEL.
- To save changes and issue an eWIC card, click SAVE & EBT CARD ISSUANCE *(Refer to* eWIC Card Issuance *for more information)*.

****Note: The EBT Card Issuance button is only displayed if the household has not been assigned an eWIC card.*

5.1.9 CREATING A NEW HOUSEHOLD

Household Search screen

- To create a new household from the Household Lookup screen, type the household member's name and click SEARCH
- If the household name is not shown on the list, click NEW HOUSEHOLD.

The Add Household screen will be displayed.

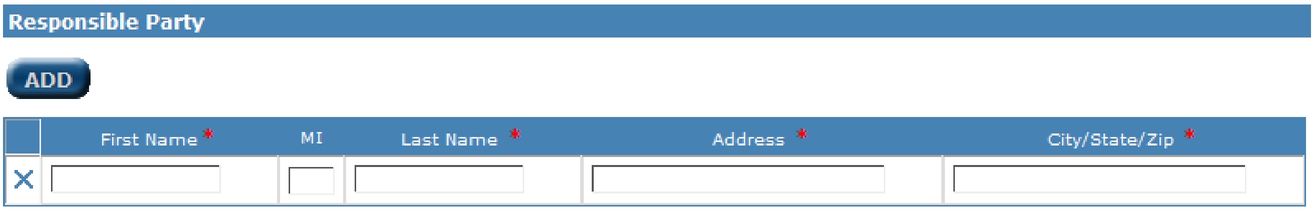
General Household Information

The first section of the Add Household **screen**, as shown below, is general household information: **County, Household #, Name, Address, City/State/Zip, and Phone #.**

Example:

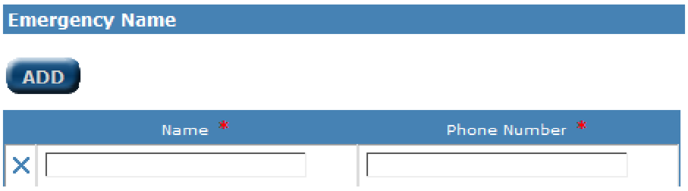
Adding a Responsible Party

The next section, as shown below, is the **Responsible Party** section. The Responsible Party is the person who will be held responsible for the member(s). There may be multiple Responsible Parties per household, but only one per member. To add a Responsible Party, click ADD. Enter the Responsible Party's **First Name**, **MI** (Middle Initial), **Last Name**, **Address**, and **City/ State/ Zip**.



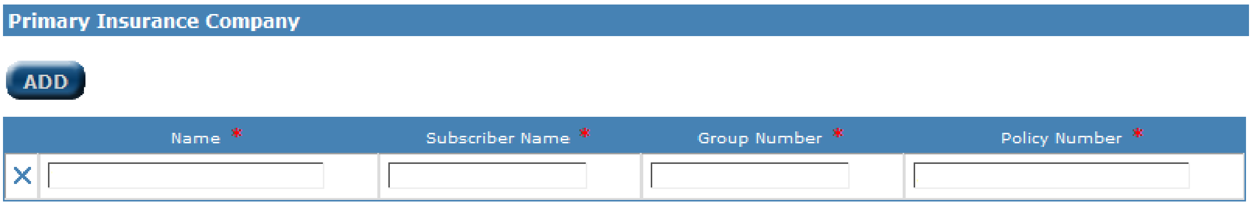
Adding an Emergency Name

The next section, as shown below, is the **Emergency Name** section. This is the name of the person who should be contacted in the event of an emergency. To add an **Emergency Name**, click ADD. Enter the contact's **Name** and **Phone Number**.



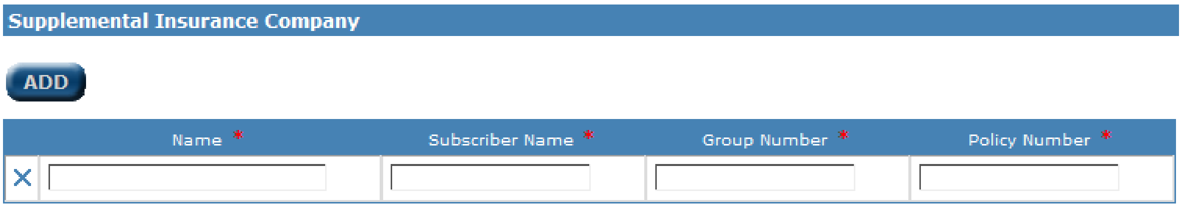
Adding a Primary Insurance Company

The next section, as shown below, is the **Primary Insurance Company** section. To add a Primary Insurance Company, click . Enter the Insurance Company's **Name**, **Subscriber Name**, **Group Number**, and **Policy number**.



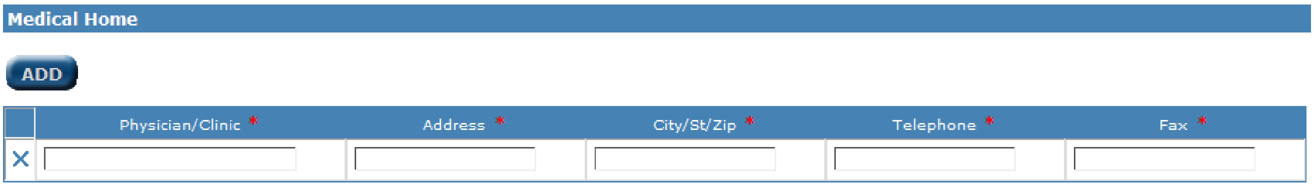
Adding a Supplemental Insurance Company

The next section, as shown below, is the **Supplemental Insurance Company** section. To add a Supplemental Insurance Company, click . Enter the Company's **Name**, **Subscriber Name, Group Number, and Policy Number**.



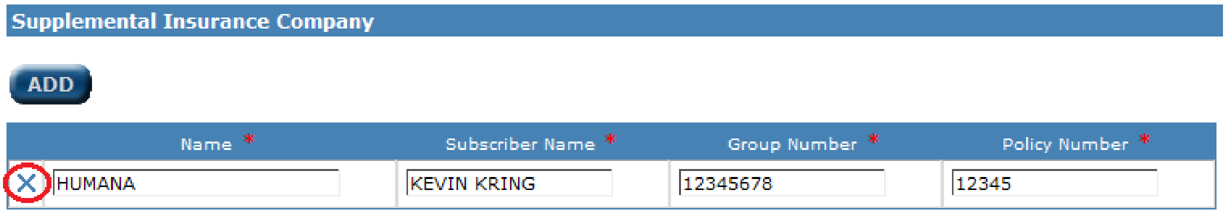
Adding a Medical Home

The next section, as shown below, is the **Medical Home** (Primary Care Physician) section. To add a Medical Home, click . Enter the **Physician/ Clinic Name**, **Address**, **City/ State/ Zip**, **Telephone Number**, and **Fax Number**.



- To delete any entries on the **Household Screen**, check the X corresponding with the entry.

Example:



6 PATIENT MENU FUNCTIONS

6.1 PATIENT MENU SCREEN

Household Member Screen

To access the **Patient Menu Screen** from the **Household Member Screen**, check the ☐ next to a member's name, and click **PATIENT MENU**.

The **Patient Menu Screen** will be displayed.

The Patient Menu screen offers access to patient information in four main areas: Growth Charts, Patient Immunizations, Registration, and WIC. The links below these main sections will take the user to a specific screen within that area.

6.2 GROWTH CHARTS

The Growth Charts application is used to capture birth information for infants, height and weight, pre-pregnancy weights, hemoglobin/hematocrit, lead, and print charts.

To access the Measures & Blood Work History screen in the Growth Chart Application, click Growth Charts on the patient menu.

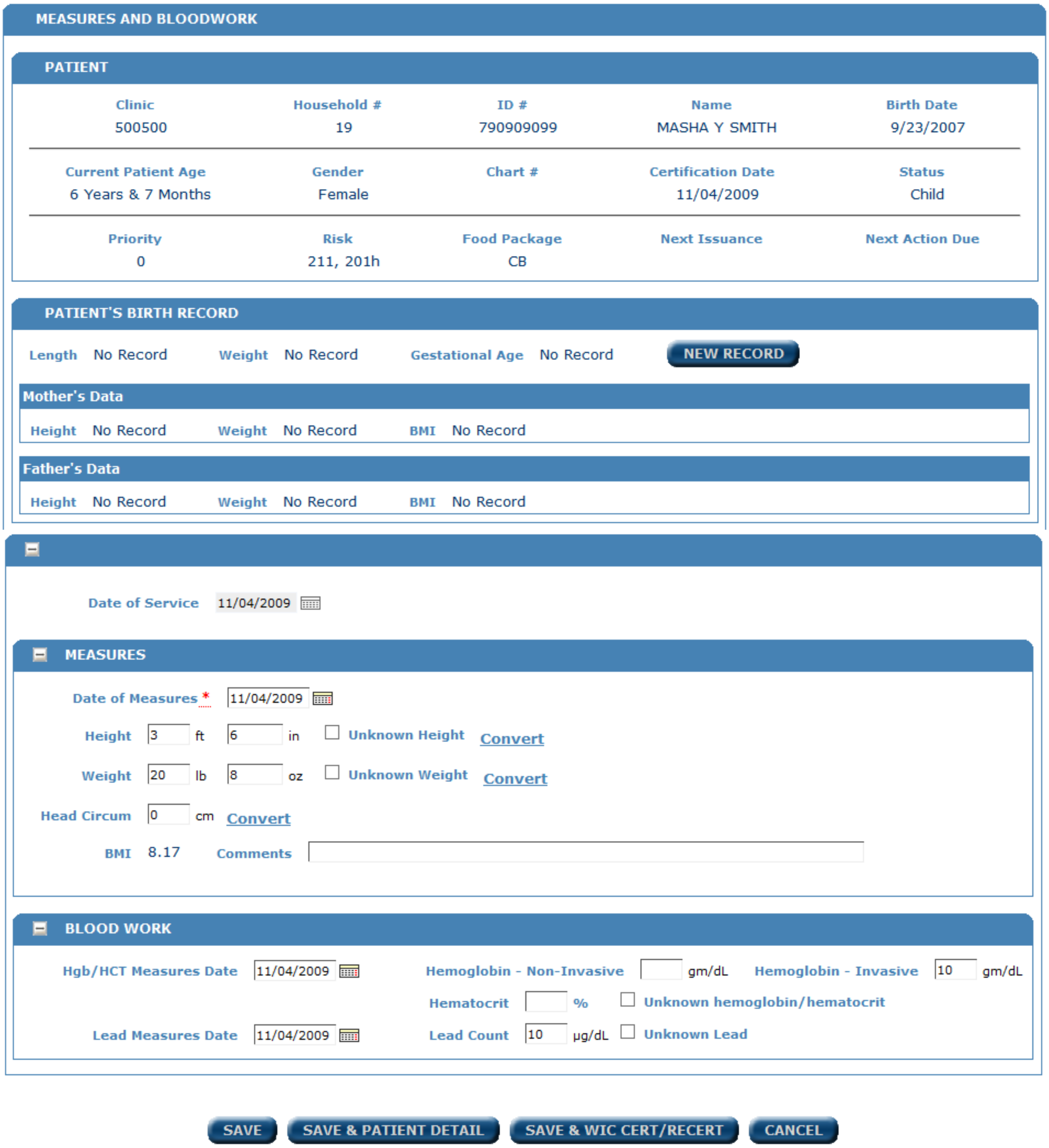
The **Measures and Blood Work History Screen** will be displayed.

6.2.1 MEASURES & BLOOD WORK HISTORY

The Measures & Blood Work History screen consists of a patient panel with general patient information, the patient's birth record, and a grid containing the patient's history of measures and blood work records.

To edit a record, click the Edit icon corresponding to a record. The Edit Measures and Blood Work screen will be displayed.

6.2.2 EDIT MEASURES & BLOOD WORK

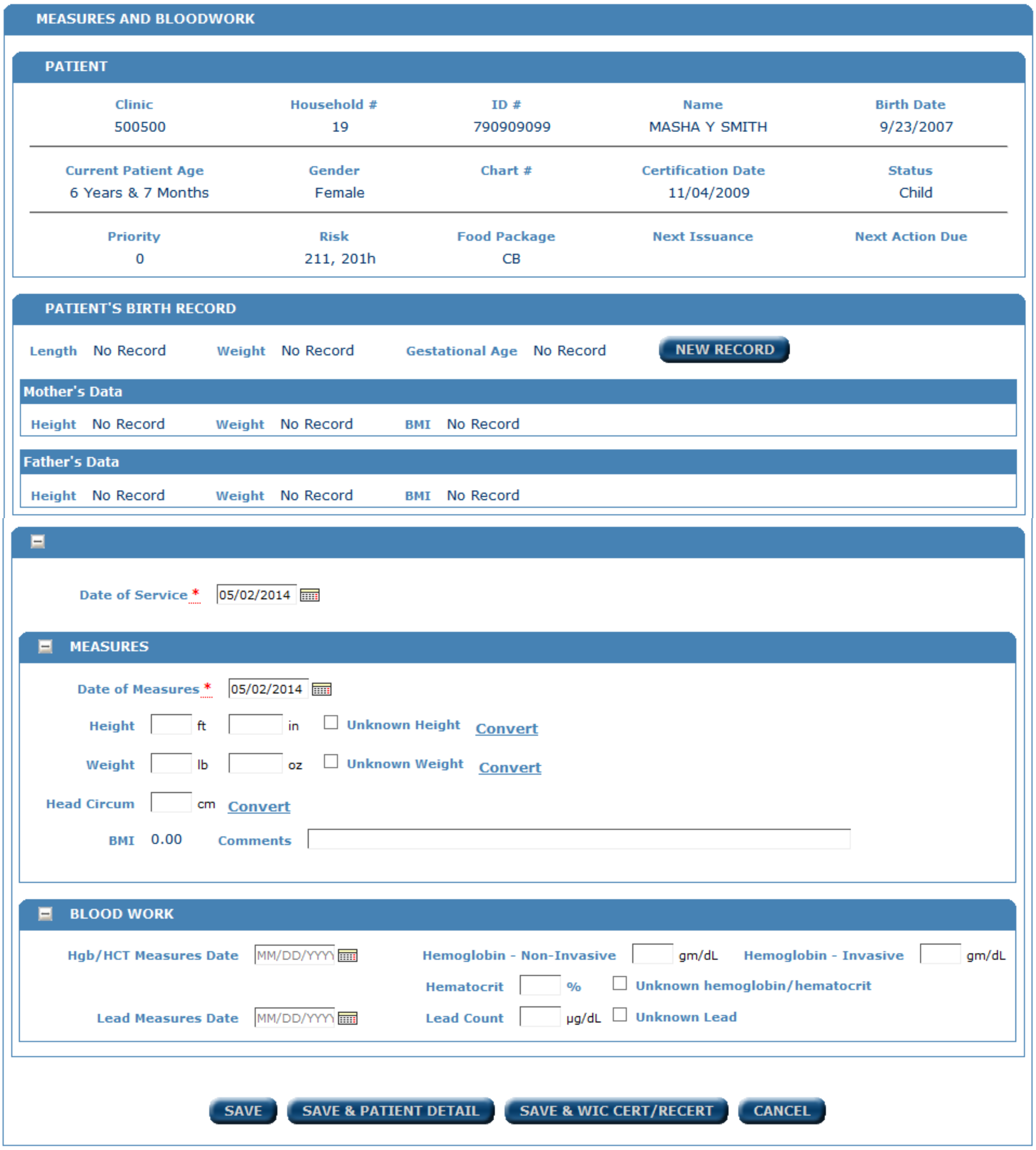


To edit any of the measures or blood work fields, click in the text box fields and change the measures/blood work numbers. To save information and return to the Measures and Blood Work History screen, click Save. To return to Measures & Blood Work History without saving changes, click Cancel.

6.2.3 NEW MEASURES/BLOODWORK

The New Measures and Blood Work screen can be accessed from the Measures and Blood Work History screen. Click 

at the top portion of the screen.

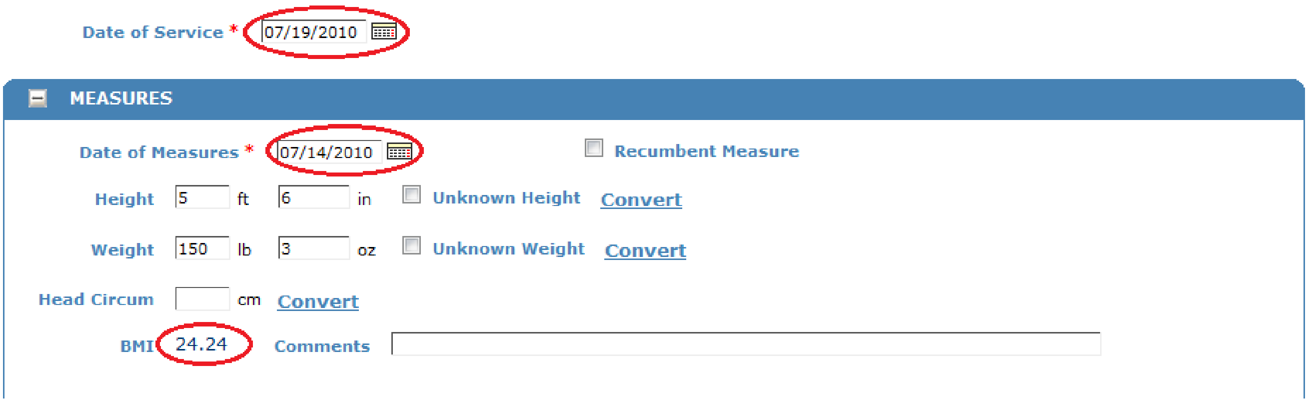

MEASURES AND BLOODWORK
PATIENT
Clinic 500500
Household # 19
ID # 790909099
Name MASHA Y SMITH
Birth Date 9/23/2007
Current Patient Age 6 Years & 7 Months
Gender Female
Chart #
Certification Date 11/04/2009
Status Child
Priority 0
Risk 211, 201h
Food Package CB
Next Issuance
Next Action Due
PATIENT'S BIRTH RECORD
Length No Record
Weight No Record
Gestational Age No Record
NEW RECORD
Mother's Data
Height No Record
Weight No Record
BMI No Record
Father's Data
Height No Record
Weight No Record
BMI No Record
Date of Service * 05/02/2014
MEASURES
Date of Measures * 05/02/2014
Height ft in Unknown Height Convert
Weight lb oz Unknown Weight Convert
Head Circum cm Convert
BMI 0.00 Comments
BLOOD WORK
Hgb/HCT Measures Date MM/DD/YYYY
Hemoglobin - Non-Invasive gm/dL
Hemoglobin - Invasive gm/dL
Hematocrit %
Unknown hemoglobin/hematocrit
Lead Measures Date MM/DD/YYYY
Lead Count µg/dL
Unknown Lead
SAVE
SAVE & PATIENT DETAIL
SAVE & WIC CERT/RECERT
CANCEL

The Patient Details panel displays: Clinic, Household Number, ID Number, Name, Birth Date, Current Patient Age, Gender, Chart Number, Certification Date, Status, Priority, Risk, Food Package, Next Issuance, and Next Action Due.

The Patient's Birth Record panel displays: Length, Weight, Gestational Age, and Mother and Father's Height, Weight, and BMI.

- If a new Patient Birth Record is being entered, click NEW RECORD.
- Date of Service is a required field. Use the calendar icon to select a date.
- The **Measures** panel displays: Date of Measures, Recumbent Measure, Height (ft.), Height (in.), Weight (lb.), Weight (oz.), Head Circumference (cm), BMI, Comments, and, if applicable, Pre-Pregnancy Weight. Complete fields.

****Note: The patient's BMI will be auto-calculated after measures have been entered.*



- The **Blood Work** panel displays: Hgb (Hemoglobin)/HCT (Hematocrit) Measures Date, Hemoglobin- Non-invasive (grams/deciliters), Hemoglobin – Invasive(grams/deciliters), Hematocrit (%), Lead Measures Date, and Lead Count (micrograms/deciliters). If blood work measures are unknown, check the appropriate unknown boxes.

Note: Only a Hemoglobin or Hematocrit measure can be entered. An error message will be displayed if both measures are entered.

After all information has been entered, click Save to save information, or Save & WIC Cert/Recert.

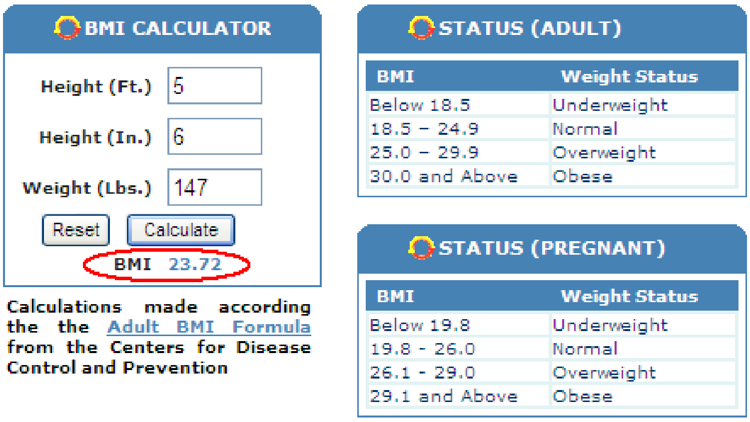
**Refer to WIC Procedures Section, 1.2 WIC Certification*

6.2.3.1 BODY MASS INDEX CALCULATOR

The BMI Calculator screen can be accessed by clicking BMI CALC at the top of any screen in the Growth Charts application.

Calculating Body Mass Index

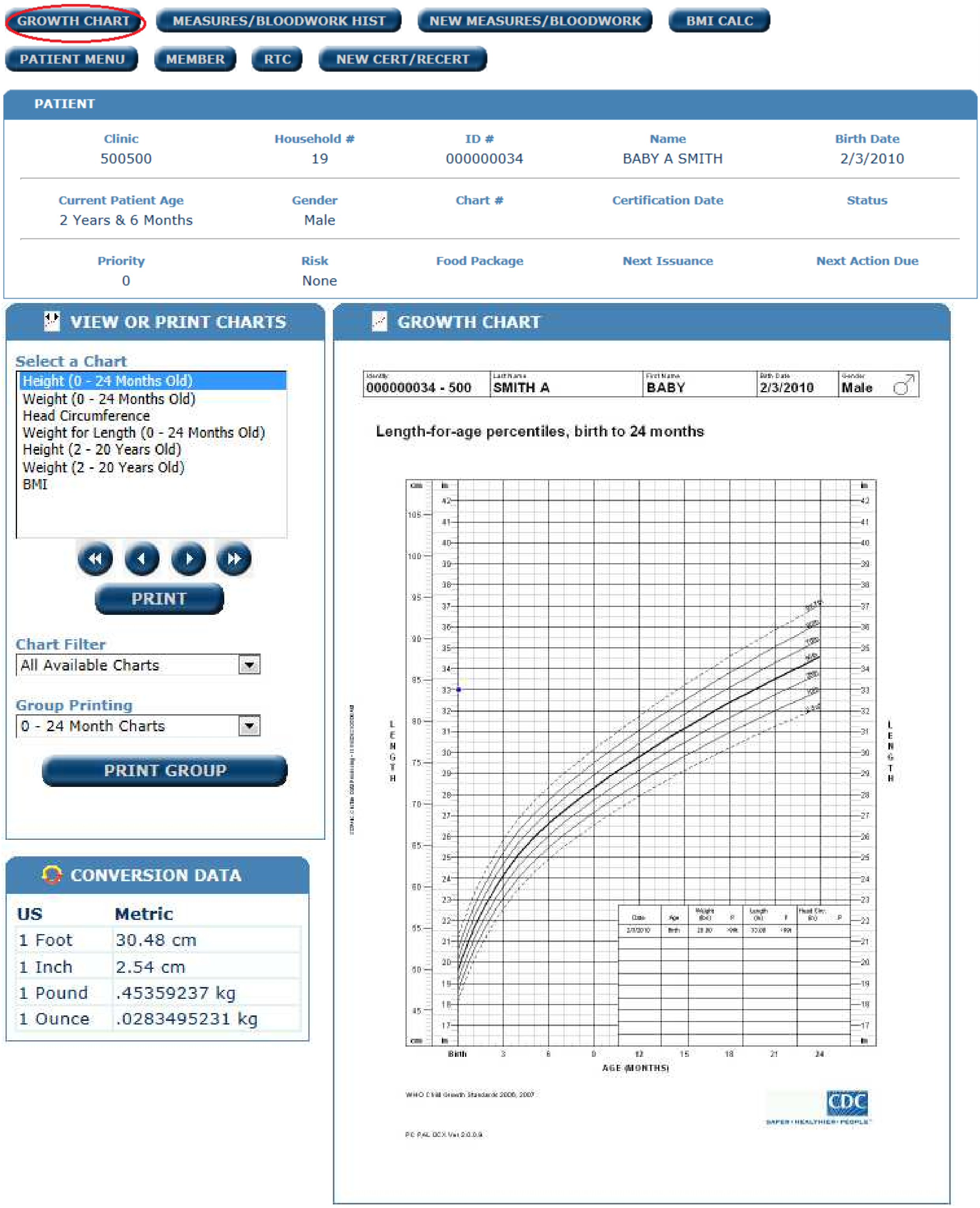
- To calculate a patient's **Body Mass Index** (BMI), type the patient's **Height** (number of feet), **Height** (number of inches), and **Weight** (in pounds) in the corresponding boxes, then click Calculate. The BMI will be calculated and appear in the bottom portion of the **BMI Calculator** box.



- Use the BMI number calculated and the **Status** charts to determine **Weight Status** category for the patient. There is a chart for adults and a separate chart for pregnant women.
- To reset the calculator, click Reset.

6.2.4 VIEWING AND PRINTING GROWTH CHARTS

After entering new measures and bloodwork, to view the growth charts for a patient, click the Growth Chart button. The Height chart will be displayed automatically as shown below.

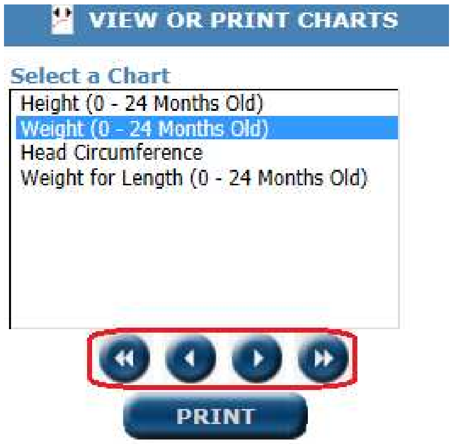


Depending on the age of the patient, the charts may be displayed in WHO or CDC mode.

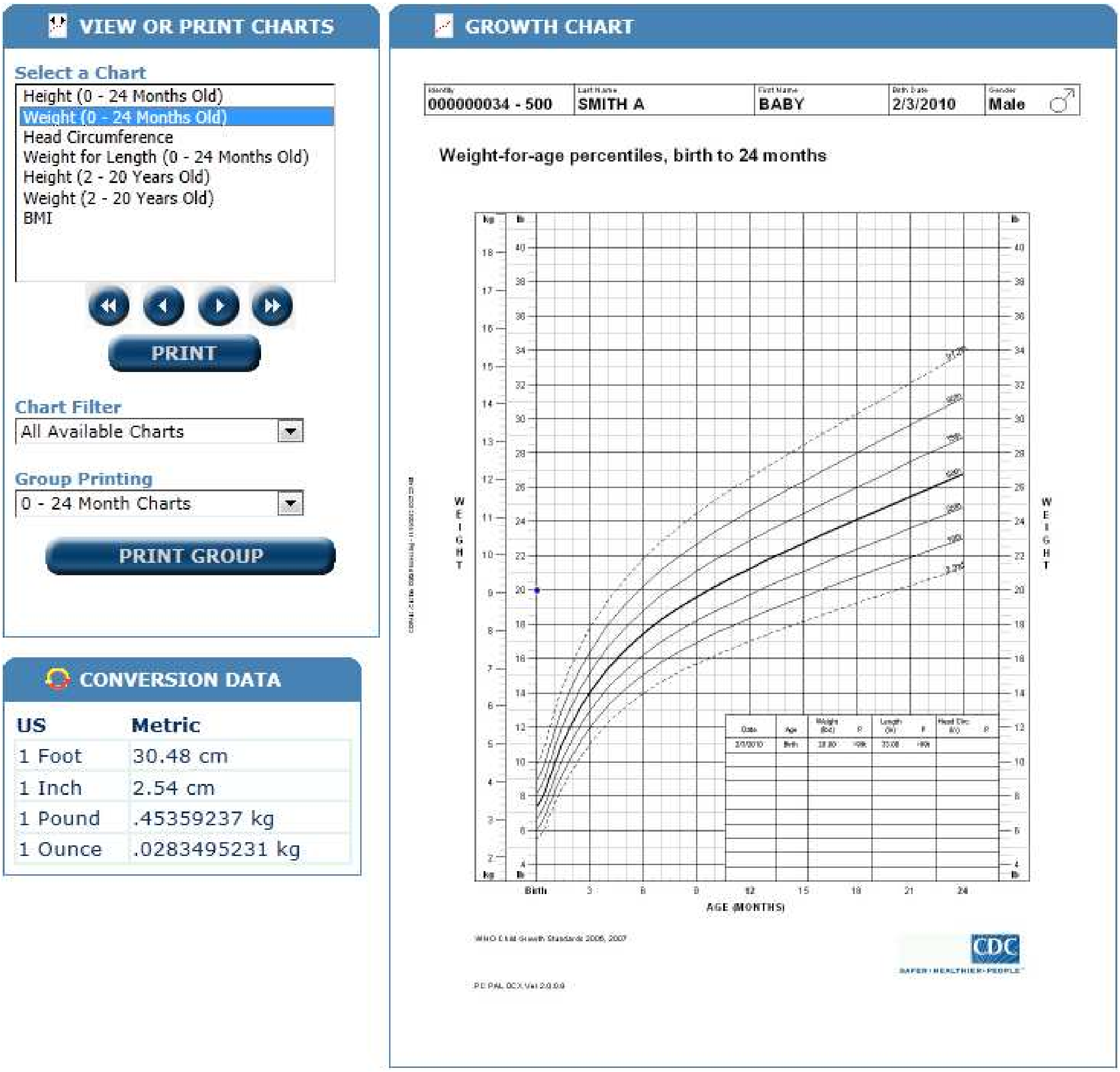
- To select a different chart (Weight, Head Circumfrence, or Weight for Length, click one of the charts in the "View or Print Charts" panel.

OR

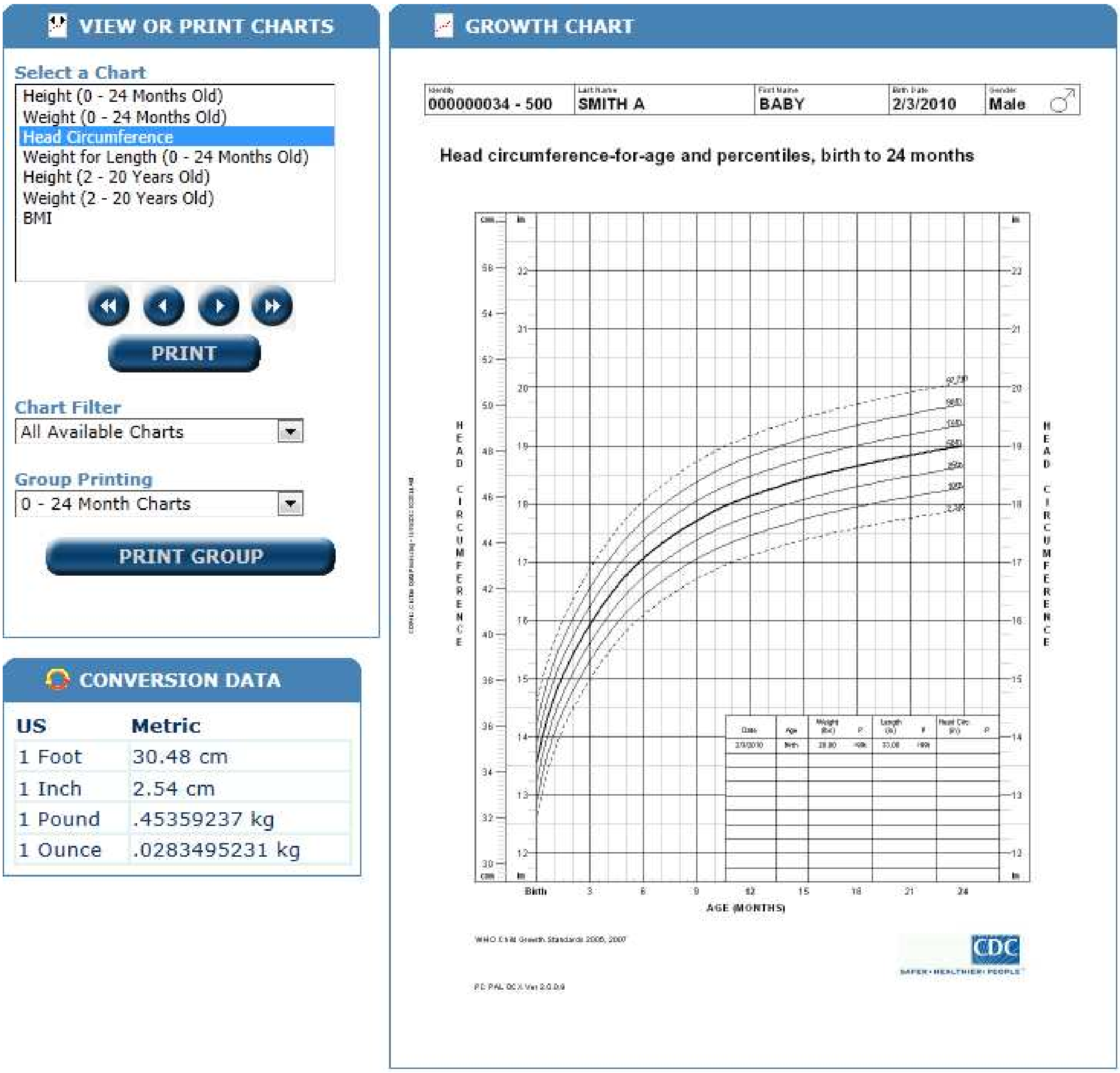
- Use the arrow buttons to change charts.



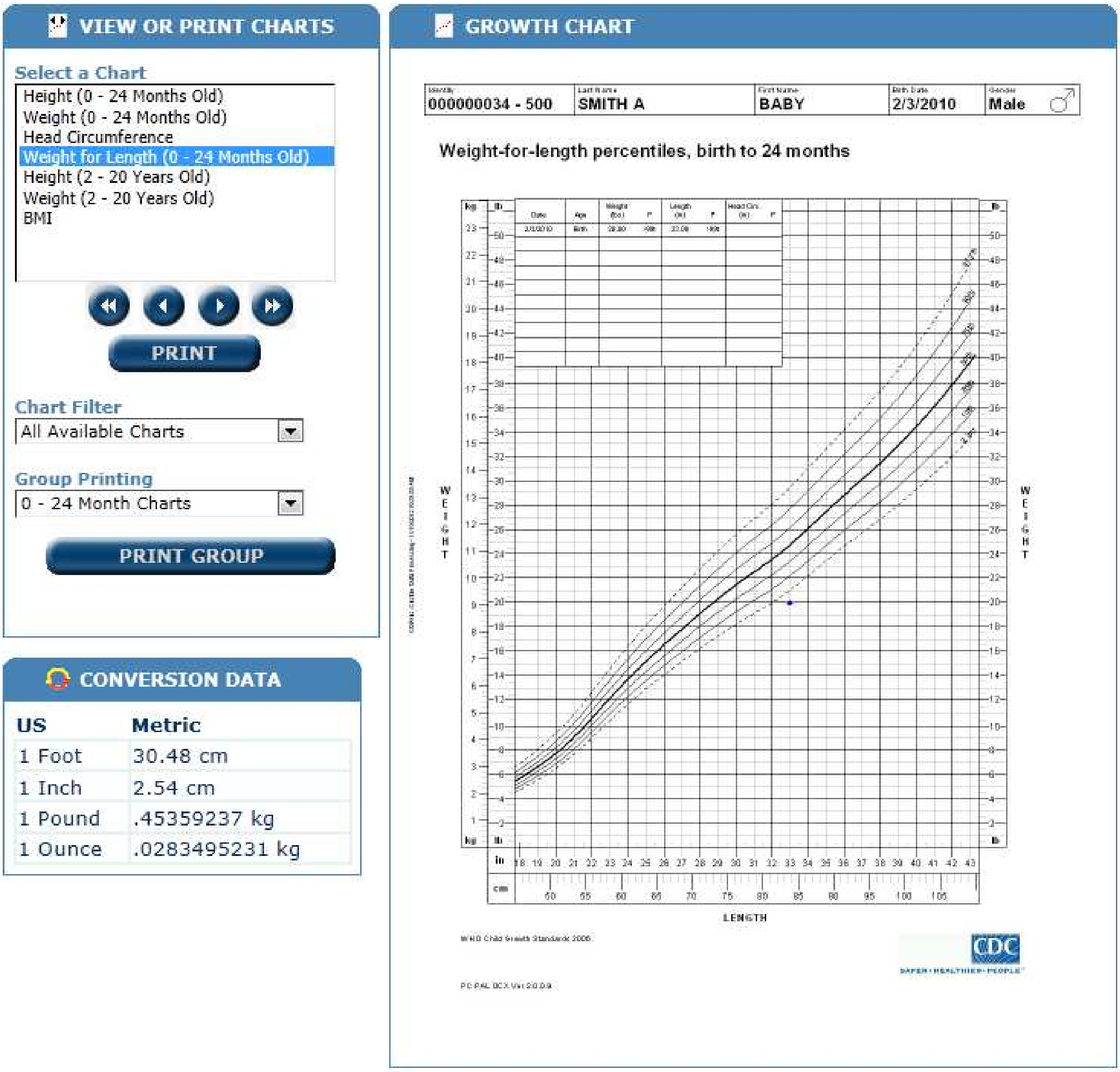
Below is an example of a Weight (0-24 months) chart.



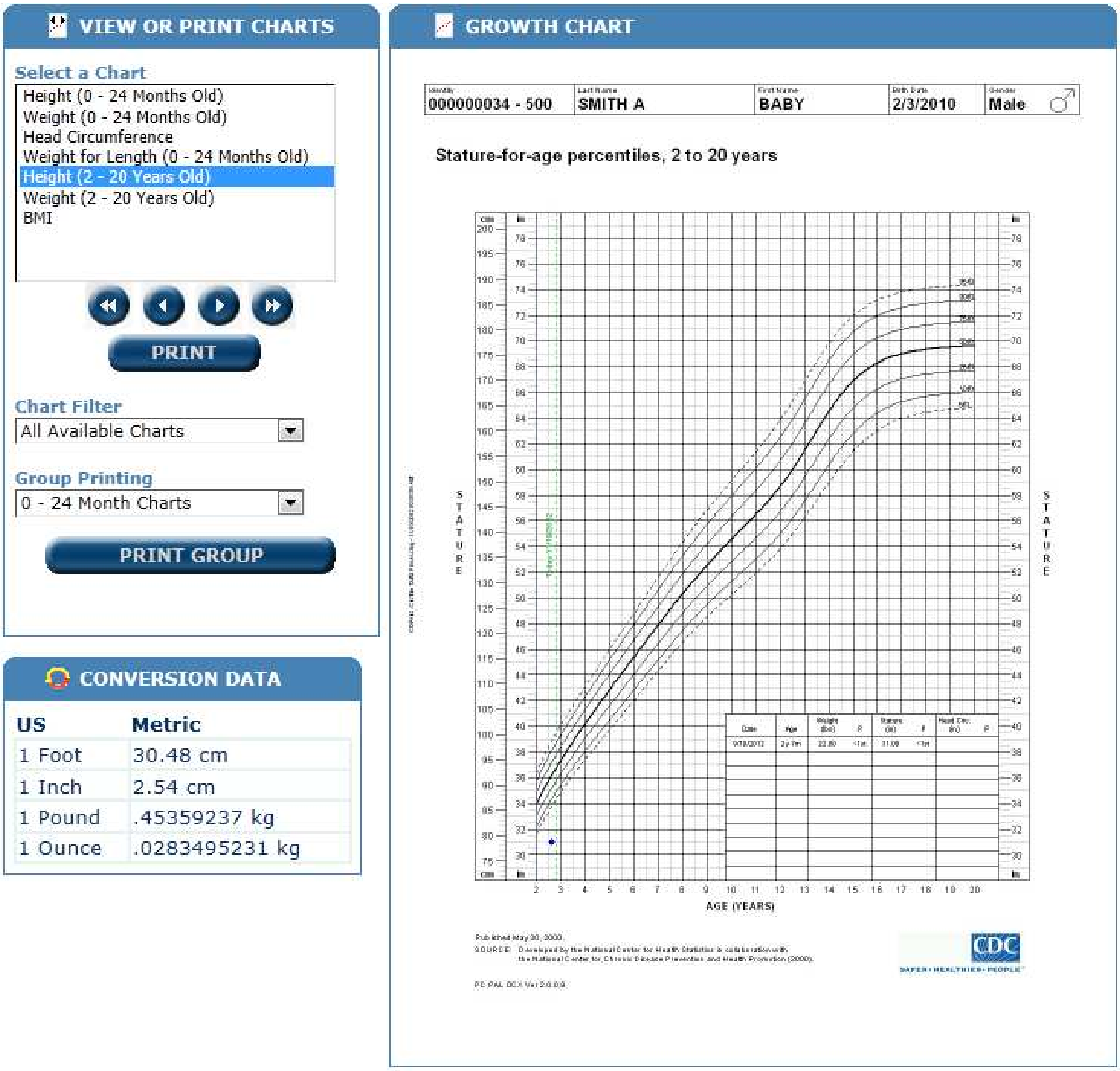
Below is an example of a Head Circumference chart.



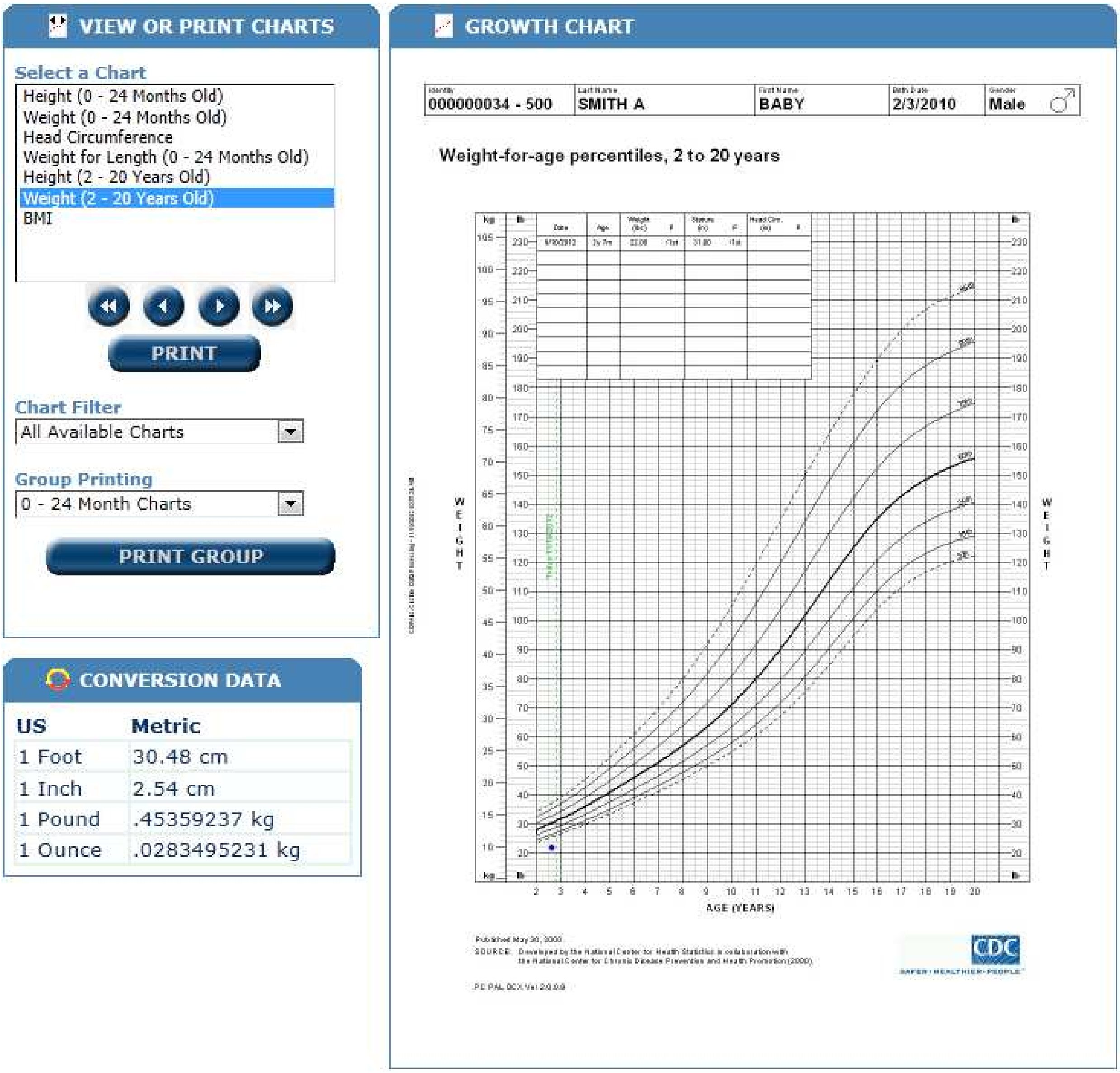
Below is an example of a Weight for Length (0-24 months) chart



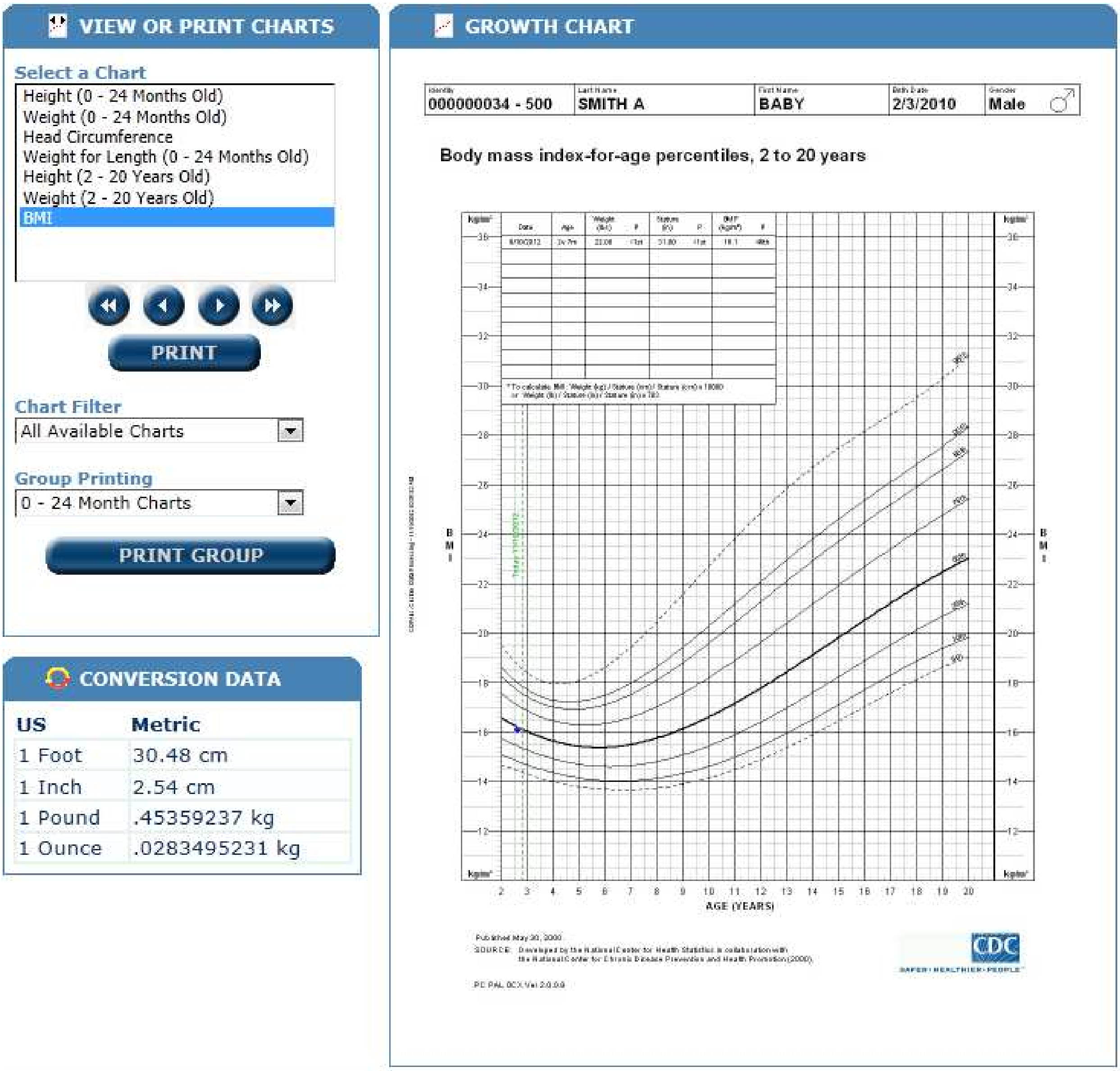
Below is an example of a chart showing Stature-for-age percentiles, 2 to 20 years old



Below is an example of a chart showing Weight-for-age percentiles, 2 to 20 years



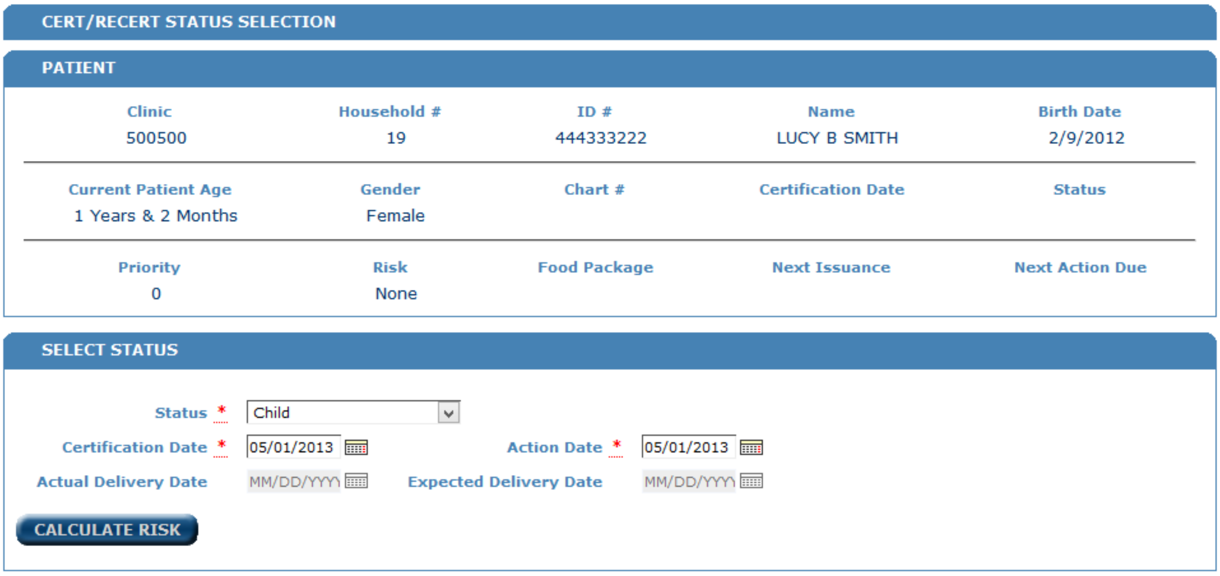
Below is an example of a chart showing Body Mass Index-for-age percentiles, 2 to 20 years



6.2.5 CERTIFICATION

To access the Cert/Recert (Certification and Recertification) Status Selection screen in the Growth Chart application, click the New Cert/Recert button at the top of any screen in Growth Charts.

6.2.5.1 CERT/RECERT STATUS SELECTION



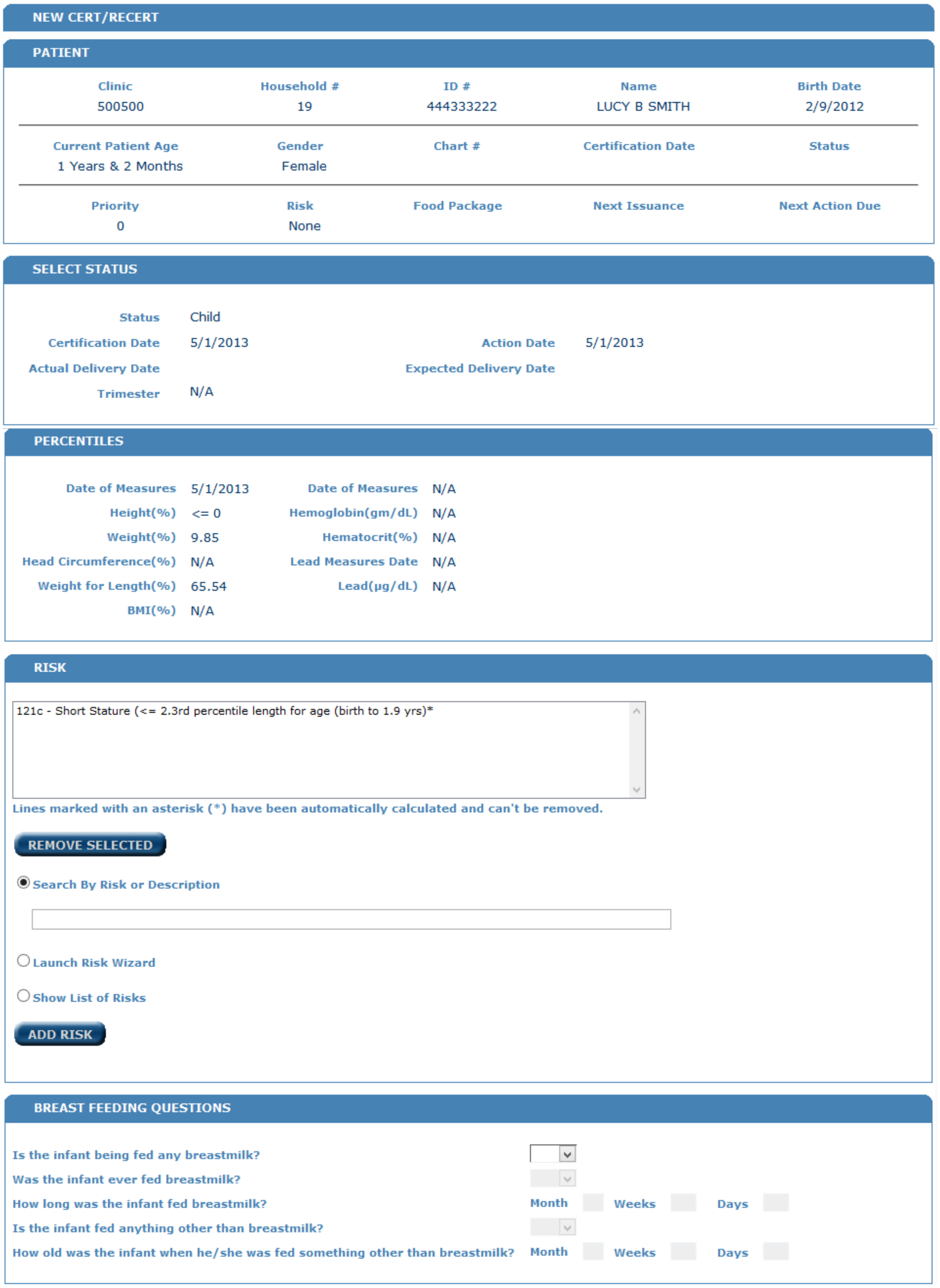
- Use the drop-down menu to select the Status. Once status has been entered, dates appropriate for the status must be entered. Use the calendar icon to select the date or manually enter the date.

After required information has been entered, click 

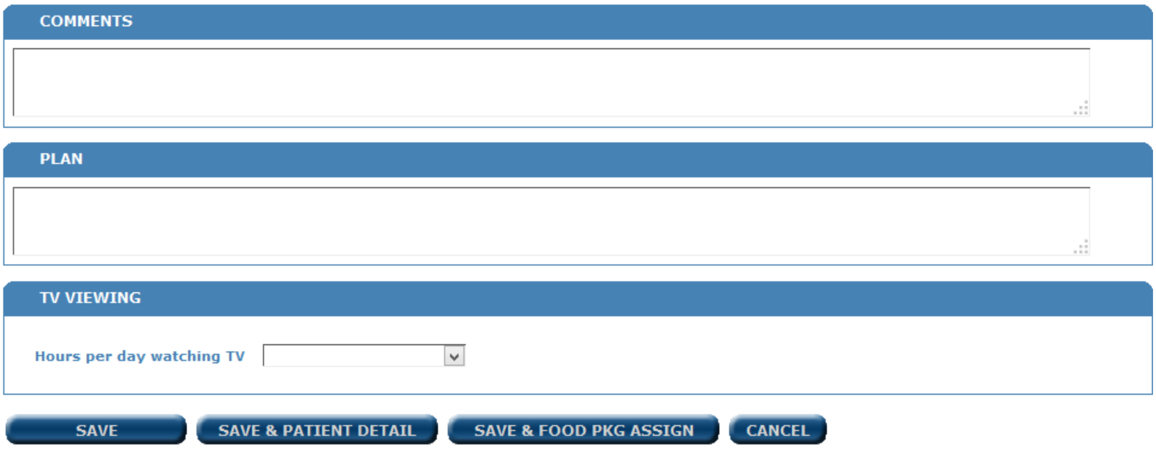
. The New Cert/Recert screen will be displayed.

6.2.5.2 NEW CERT/RECERT

The Cert/Recert screen displays risks automatically assigned based on the patient's measures and blood work.



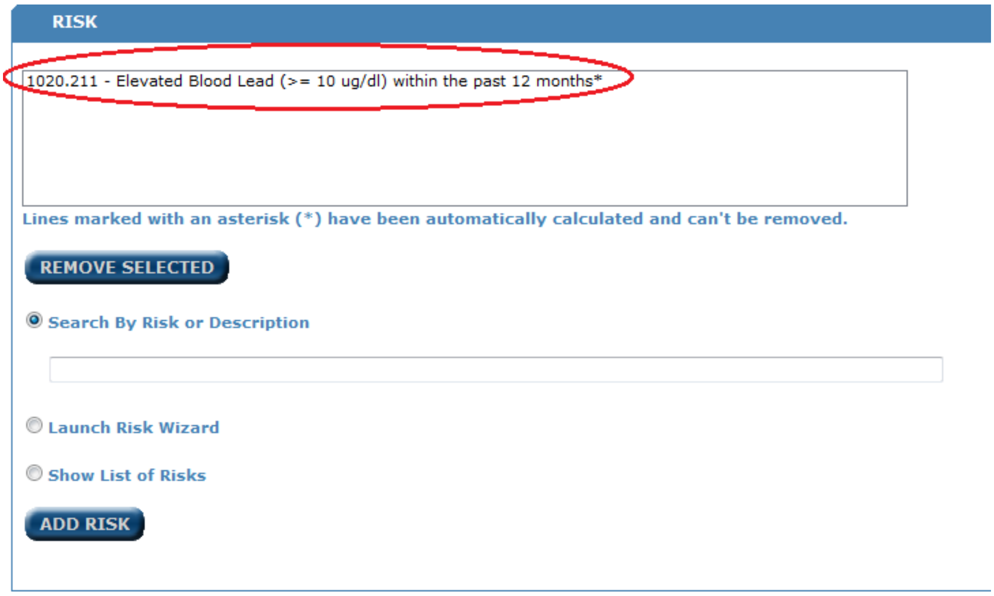
***Note: Screen continues on next page.



The **New Cert/Recert** screen is divided into sections: **Patient, Select Status, Percentiles, Risk, Breast-feeding Questions** (if appropriate for status)**, Comments, TV viewing** (if appropriate for age) and **Plan.**

The **Percentiles** panel contains all of the percentages from the measurements entered for the patient. This includes: **Dates of Measures, Height, Weight, Head Circumference, Weight for Length, BMI** (Body Mass Index)**, Date of Measures, Hemoglobin, Hematocrit, Lead Measures Date,** and **Lead.**

The **Risk** panel shows the risks that were calculated for the patient based on the measures and blood work entered.



- To remove a Risk that has been assigned, click on a Risk to highlight it, and then click REMOVE SELECTED. Risk marked with an asterisk have been automatically calculated and can't be removed through this process. To remove an automatically assigned risk, measures resulting in the risk assignment must be changed.

****Note: If a Risk Code has been marked with an asterisk (*), it was calculated automatically and cannot be removed. To remove an automatically assigned risk, measures resulting in the risk assignment must be changed.*

- To add a Risk, select the ◯ next to the method by which the Risk will be found: Search by Risk or Description, Launch Risk Wizard, or Show List of Risks. If using Search by Risk or Description, once desired Risk is found, click on the Risk to highlight it, and then click ADD RISK. The Risk will be added to the Risk table.

- To **Launch the Risk Wizard**, select the ◯ corresponding with Launch Risk Wizard. The Wizard is used to help make determinations about which risks to apply to a WIC Patient. If any of the criteria apply to the patient, select the ☐ corresponding with it, and then click Next. If the criteria do not apply to the patient, just click Next.

After the process has been completed, click Finish.

- To **Show a List of Risk Codes** from which to choose, select the ◯ corresponding with Show List of Risk Codes. Use the arrows to navigate through the list of Valid Risks, and click on a risk to highlight it, and then click ADD RISK

6.3 PATIENT IMMUNIZATIONS

Patient Menu screen

To access the **Patient Immunization** screen from the **Patient Menu screen**, click Immunizations .

The Patient Immunizations screen will be displayed.

The Immunizations screen displays a patient's vaccination records.


CDP cms Kentucky Clinic Management Immunizations

PORTAL LOGOUT

PATIENT | PATIENT SEARCH | PATIENT MENU

Patient #: 123456789 Medicaid #: Chart #: Name: JOHN SMITH DOB: 8/1/1954 Age: 56 Years, 4 Months.

Exemptions: Medical - Vaccine Group: Measles, Mumps, Rubella - Permanent (Start: 8/16/2010)

Contraindications: Vaccine Group: Hepatitis A Vaccine: Hepatitis A - Anaphylactic reaction to a vaccine component - Permanent (Start: 8/18/2010)
Vaccine Group: Hepatitis A Vaccine: Hepatitis A - Anaphylactic reaction to previous dose of the vaccine - Permanent (Start: 8/18/2010)
Vaccine Group: Hepatitis A Vaccine: Hepatitis A - Anaphylactic reaction to Alum - Permanent (Start: 8/10/2010)
Vaccine Group: Measles, Mumps, Rubella All vaccines - Anaphylactic reaction to a vaccine component - Permanent (Start: 8/8/1997)

Precautions: Vaccine Group: Hib Vaccine: Hib, PRP-T - Moderate or severe acute illness - Permanent (Start: 8/18/2010)

Adverse reactions: Hepatitis A - Anaphylactic reaction vaccine comp (Date: 8/18/2010)
Hepatitis B - Anaphylactic reaction previous dose (Date: 5/8/1997)
Hepatitis B - Fever of >=40.5C (105F) (Date: 5/8/1997)

IMMUNIZATION HISTORY

Certificate Status Summary - Patient Age: 56 yrs. or 676 mos.

(i) 7 years of age or older and has received:
1.a. Five (5) doses of DTP or DTaP or combinations of the two (2) vaccines
b. A dose of Td that was preceded by two (2) doses of DTP, DTaP, DT, or Td or combinations of the four (4) vaccines - No
2. One (1) dose of Td or Tdap given at eleven (11) to twelve (12) years of age,
if at least five (5) years have elapsed since the last dose of DTaP, DTP, or DT - Yes
3. Four (4) doses of OPV or IPV or combinations of the two (2) vaccines - No
4. One (1) dose of MMR and a second dose of measles-containing vaccine - Yes (Medical Exemption - Vaccine Group:Measles, Mumps, Rubella)
5.a.Three (3) doses of HepB, if he or she was born October 1, 1992 or later; or
b. Two (2) doses of adult HepB approved by the Federal Drug Administration (FDA) as an alternative schedule
for adolescents eleven (11) to fifteen (15) years of age, completed by age sixteen (16). - Yes

Provisional Immunization Certificate will be issued. (Certificate will be valid until 12/15/2010)

PROVISIONAL IMMUNIZATION CERTIFICATE | CERTIFICATE OF MEDICAL EXEMPTION

1 of 1 5 Items 50 /Page GO

Vaccine	Date	Immunization Clinic Name	Type/Manufacturer	Validity
DTaP	8/5/2010			Valid
DTaP	8/10/2010			Invalid
Hepatitis A	8/5/2010			Valid
HepB, adol/high risk infant	8/5/2010			Valid
Hib, PRP-T	8/19/2010		Sanofi Pasteur	Valid

Patient Details

The **Patient Details** section consists of: **Patient Number, Medicaid Number, Chart Number, Name, Date of Birth, and Age.**

Immunizations History

The **Immunizations** section consists of: **Vaccine, Date, Immunization Clinic Name, Type/Manufacturer, and Validity.**

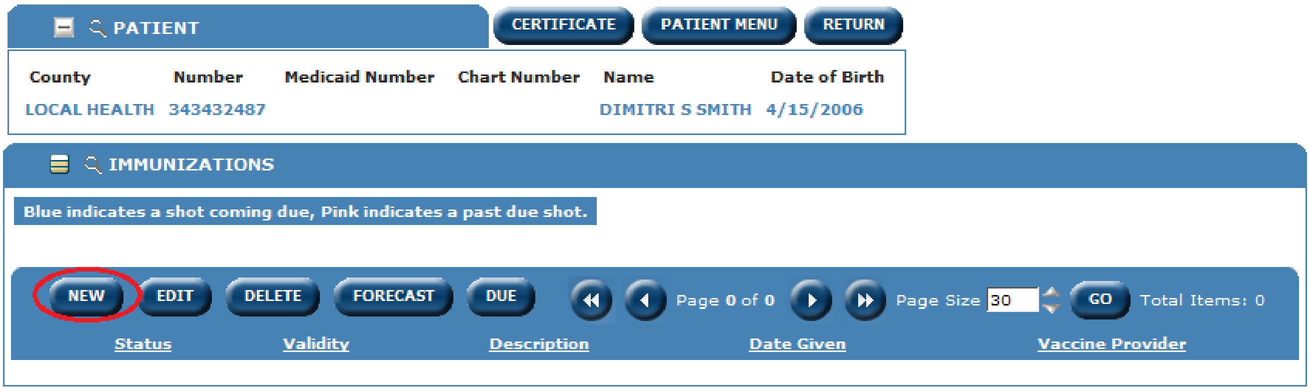
- To add a new immunization, click NEW.
- To edit an existing immunization, select the ☐ next to the immunization and click EDIT.
- To delete an existing immunization, select the ☐ next to the immunization and click DELETE.
- To view the complete immunization forecast for the patient, click FORECAST.
- To show immunizations due for the patient, click DUE.

There are three buttons adjacent to the Patient Details section: Certificate, Patient Menu, and Return.

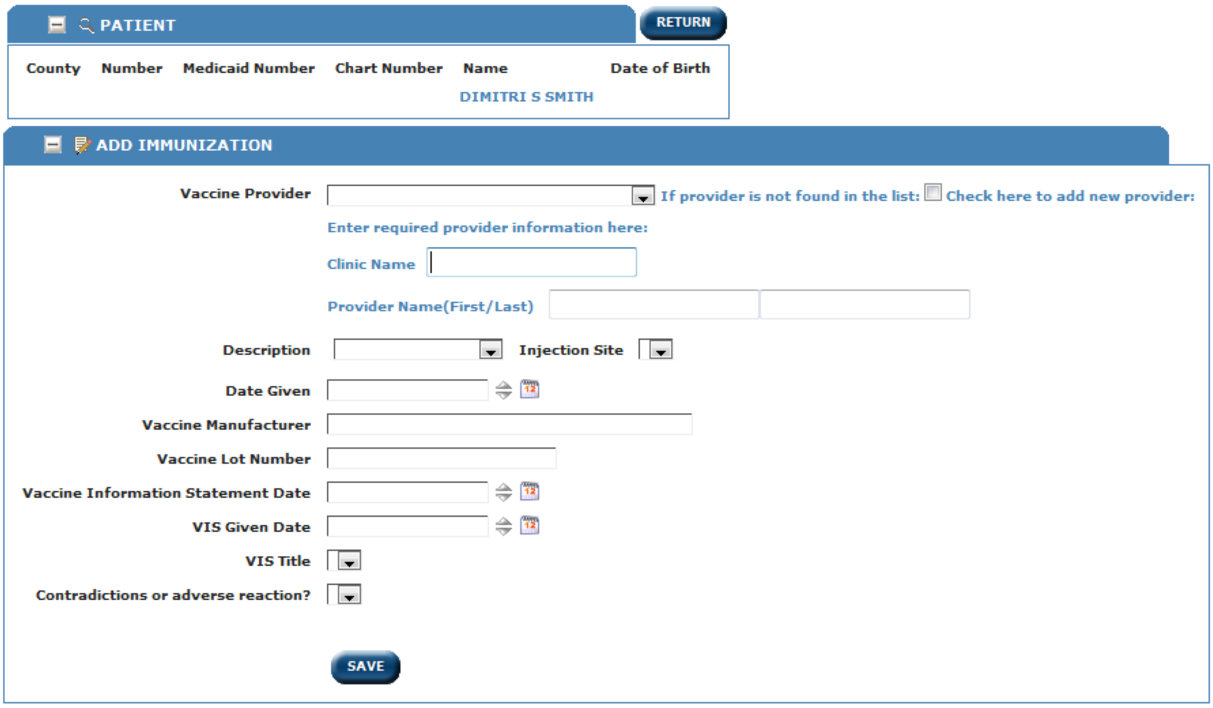
- To print an Immunization Certificate for the patient, click CERTIFICATE.
- To return to the Patient Menu screen, click PATIENT MENU.

6.3.1 ADD IMMUNIZATION

To add an Immunization from the Show Immunizations screen, click .



The Add Immunization screen will be displayed.

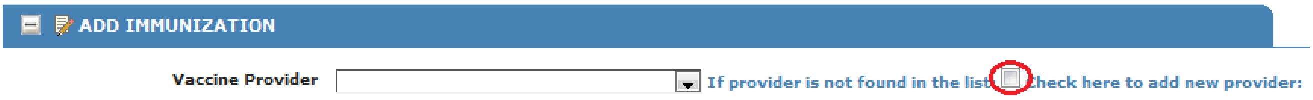


The Add Immunization screen consists of two panels: Patient Details and Add Immunization.

The Patient Details panel displays the County, Number, Medicaid, Chart Number, Name, and Date of Birth.

- Use the drop-down menus to select: Vaccine Provider, Description, Injection Site, VIS Title, and Contradictions or adverse reaction.

****Note: If the provider is not found in the list, check the box to add a new provider.*



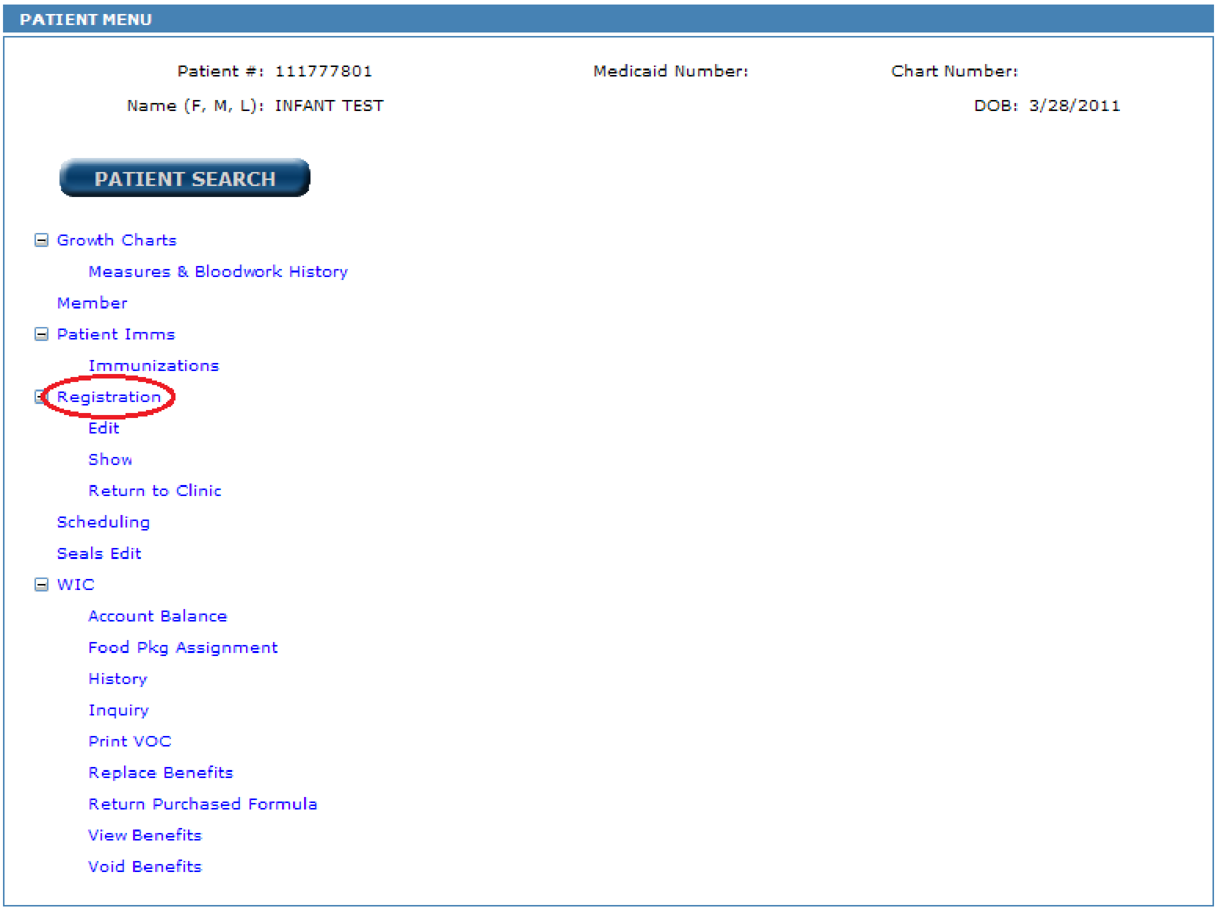
- Enter the Clinic Name, Provider Name (First/Last), Vaccine Manufacturer, and Vaccine Lot Number.

- Manually enter the dates for Date Given, Vaccine Information Statement Date, and VIS Given Date, or use the calendar icons to select the dates.

6.4 REGISTRATION

Patient Menu screen

To access the **Registration** screen from the **Patient Menu** screen, click Registration.

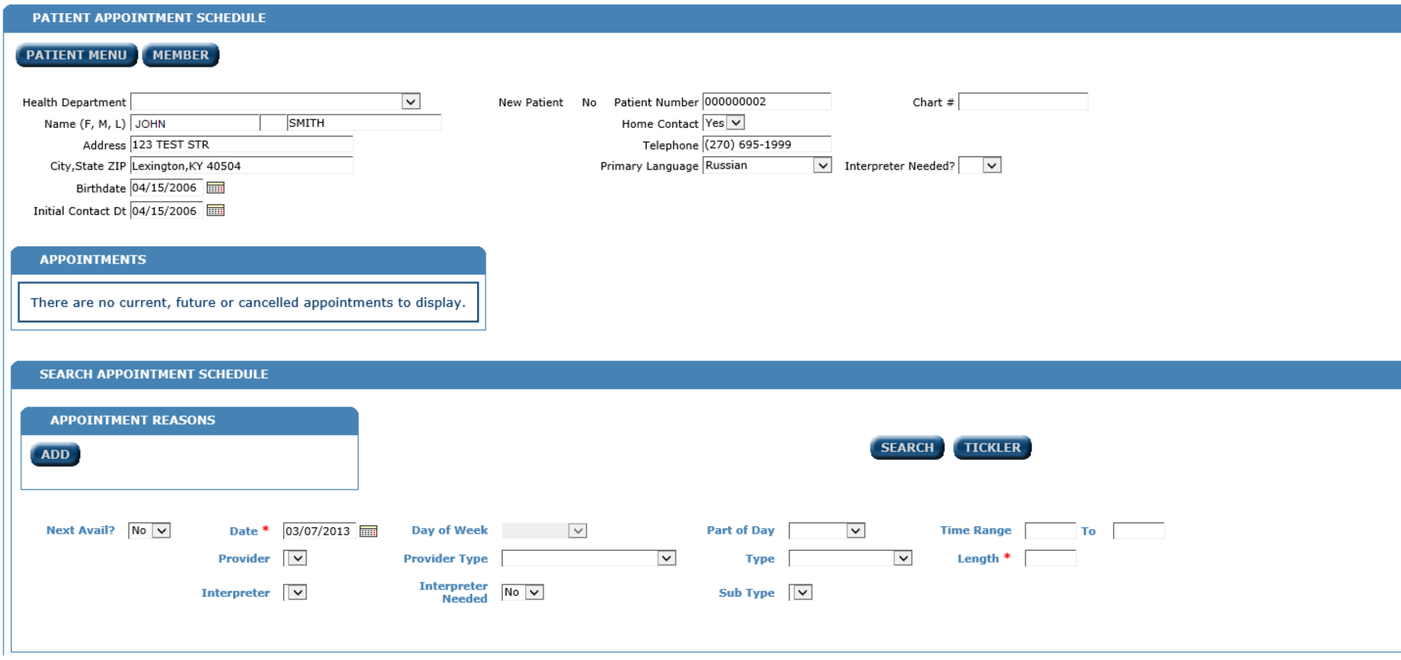


The Edit Patient screen will be displayed for an established patient. For a new patient, the Add Patient screen will be displayed. Refer to Adding A New Patient in section 4.1.

6.5 SCHEDULING

Patient Menu screen

To access the **Scheduling** screen from the Patient Menu screen, click Scheduling.



The top portion of the screen contains patient information: Patient Number, Chart #, Name, Home Contact, Address, Telephone, City/St/Zip, Gender, Birth date, Primary Language, Interpreter Needed?, and Initial Contact Dt.

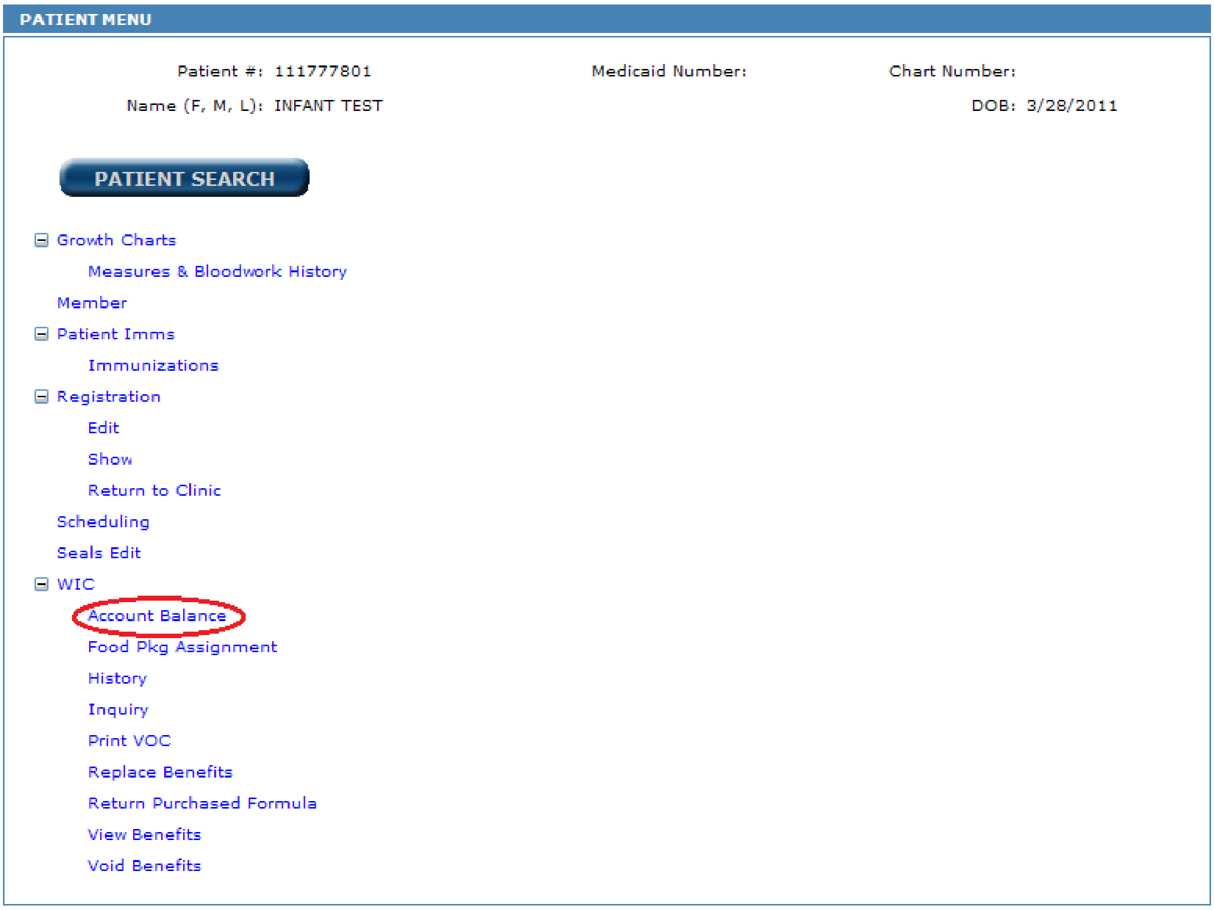
- To view the Current Scheduled Appointments for the patient, click HISTORY.
- To Add an Appointment Reason, use the drop-down menu and select a reason, then click ADD.
- To Delete an Appointment Reason, select the ◉ next to a reason and click DELETE.

- Use the drop-down menu to select an Appointment Reason, Next Available, Provider, Provider Type, Type, Interpreter, Interpreter Needed, Sub-type, Day of Week, and Part of Day.
- The date will be auto-filled with today's date. To change the date, use the calendar icon . Enter the Time Range and Length.
- Click SEARCH.

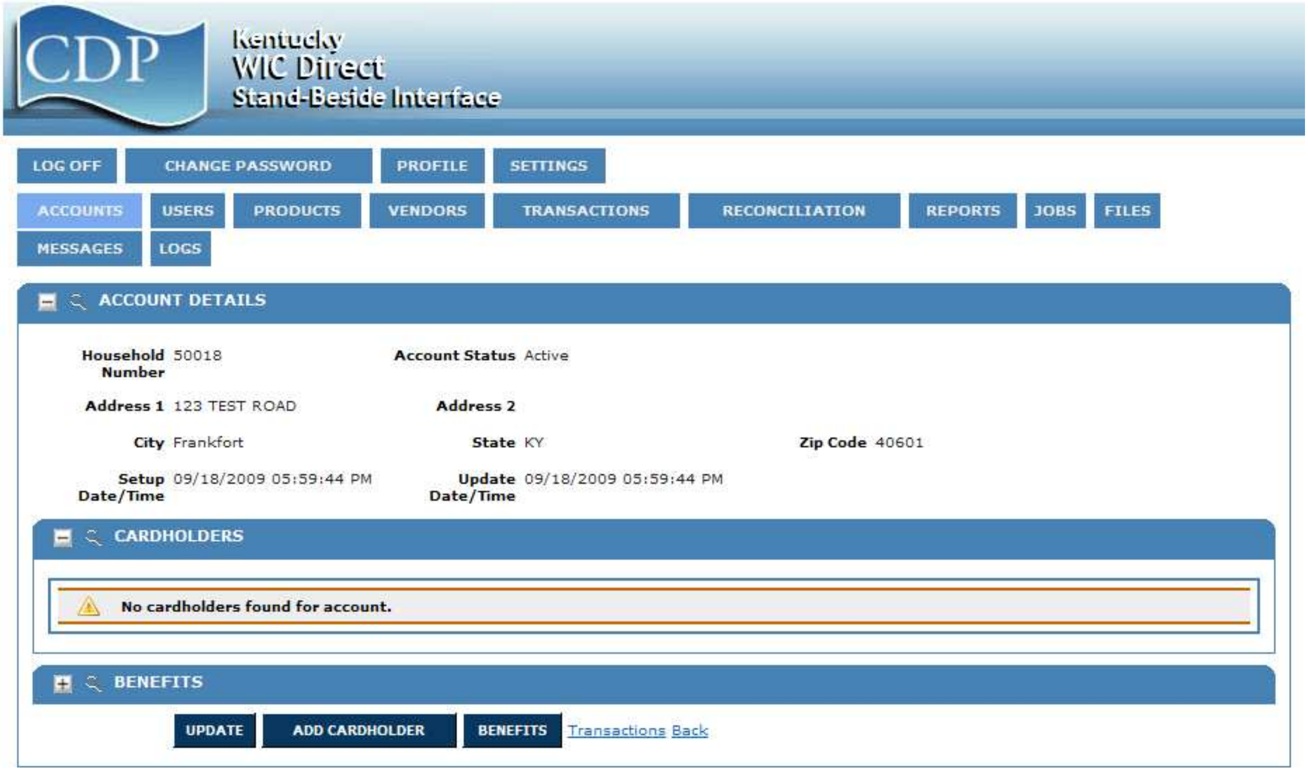
6.6 ACCOUNT BALANCE

Patient Menu screen

To access the **Account Balance** screen from the Patient Menu screen, click Account Balance.



The **Account Details** screen is part of the WIC Direct Stand-Beside Interface and will be shown in a separate window.



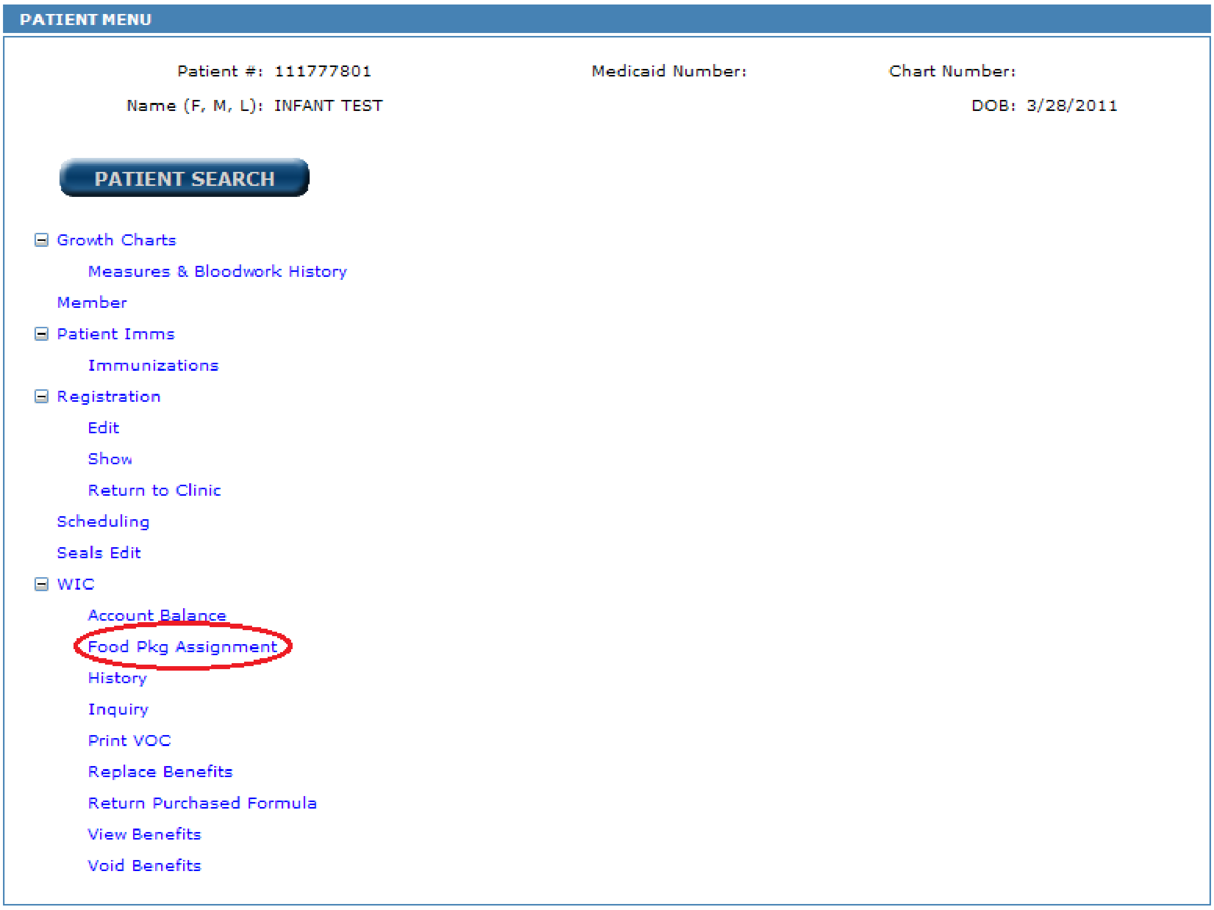
The Account Details screen shows the benefits remaining for the household. The benefits can be modified or exported, depending on the user security. This screen also allows the user to add a Cardholder. Refer to WIC Issuance in section 5.1.5 for more details on this screen.

- To return to the Patient Menu screen, close out of the Account Details screen.

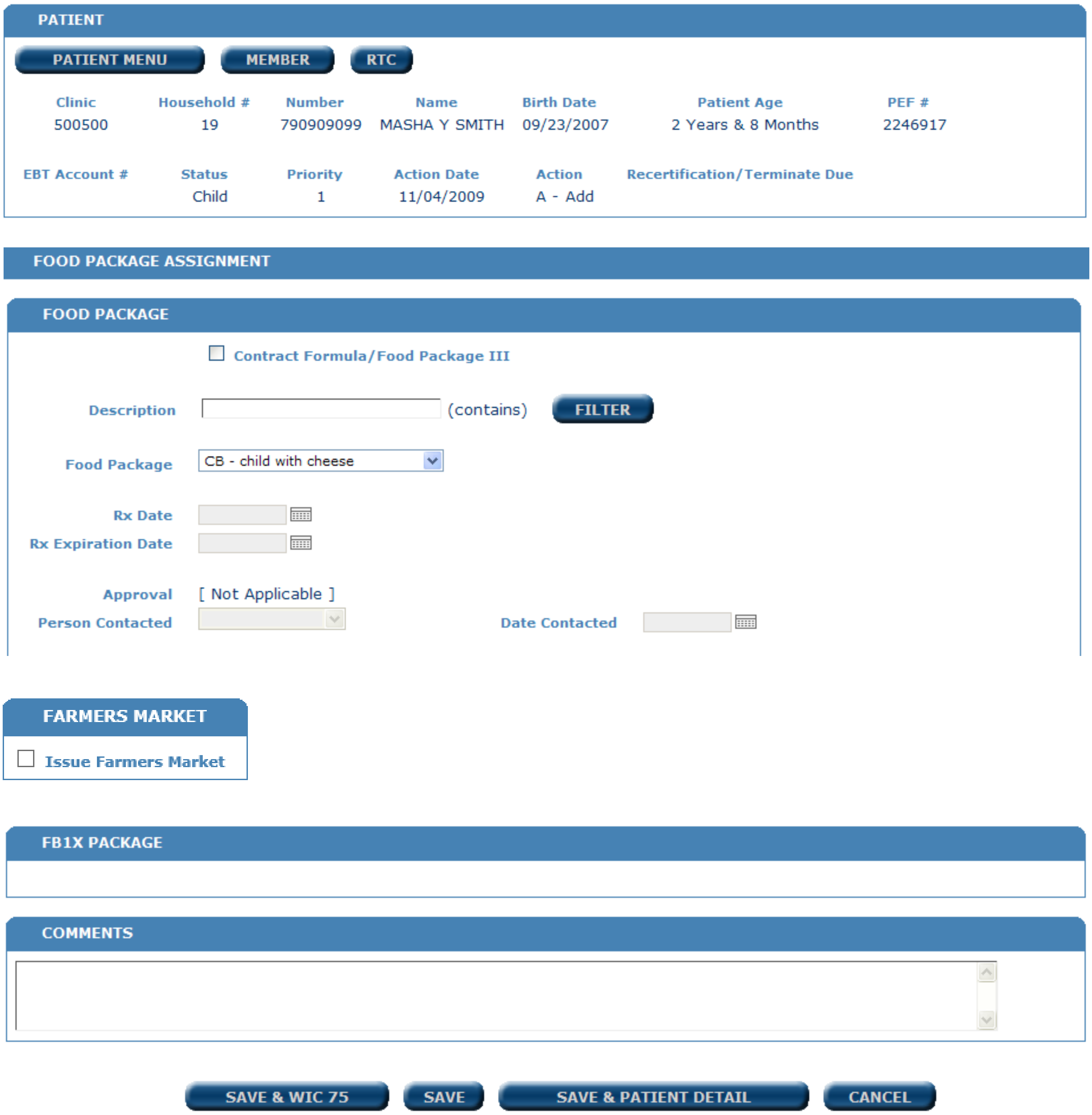
6.7 FOOD PACKAGE ASSIGNMENT

Patient Menu screen

To access the **Food Package Assignment** screen from the Patient Menu, click Food Pkg Assignment. Food Package assignment is used by a Health Professional to assign an appropriate food package to a patient.



The **Food Package Assignment** screen will be displayed.



Patient Details

The first section of the screen is the **Patient Section**. This has specific patient information including: **Clinic, Household #, Number, Name, Birth Date, Patient Age, PEF** (Patient Encounter Form) **#, EBT Account #, Status, Priority, Action Date, Action, and Recertification/ Termination Due.**

Selecting a Food Package

- The Food Packages populated will be based on the status and age of the patient.

- Use the description search filter to narrow results. Click 

.

- Use the drop-down menu  to select a Food Package.

Example:

- If the Food Package selected requires a prescription, the Rx Date and Rx Expiration Date must be completed.

- If approval for the Food Package is required, the Person Contacted must be completed.

Example:

- A list of the contents of the food package will be displayed. This includes the Subcategories and the quantities of each. The fields for Eliminate/Reduce, New Quantity, Reason, and Comment will be available to edit individual food items when elimination or reduction is allowed in the food package.

6.7.1 ELIMINATE/REDUCE FROM FOOD PACKAGE

If a food package has been set to allow eliminates or reductions, the Eliminate/Reduce drop-down menu will not be grayed out for those subcategories. An example of this type of food package is shown below.

Qty	Subcategory	Eliminate/Reduce	New Qty	Reason	Eliminate/Reduce Comment
1.00	Peanut Butter 18 oz - cont				
3.00	11.5 oz Conc/12.0 oz Frozen or 46/48 oz Juice - cont				
4.75	Reduced Fat 2%,Low Fat 1%, or Skim Milk - Gal				
1.00	Eggs - in Dozen Cartons - dozen				
1.00	Dry or Can Beans/Peas 16 oz (1 Bag = 4 Cans) - cont				
36.00	Breakfast Cereal - hot and cold 10 oz or Larger - Ounce				
10.00	Fruit and Vegetables - Cash Value Benefit - $$$				
1.00	Cheese in 8 or 16 oz Packages - pound				
16.00	Bread 12,16,24 oz / Rice 14,16 oz / Tortilla 16 oz - Ounce				

The Subcategories also include the measurements for the specific food item. For example, cheese is in pounds and eggs are in dozens.

Example:

Qty	Subcategory	Eliminate/Reduce	New Qty	Reason	Eliminate/Reduce Comment
36.00	Cereal (Adult) - all authorized hot and cold - Ounce				
24.00	Whole fluid milk - quart				
4.00	Juice - All categories - 12 oz frozen or 48 oz liq - cont				
3.00	Cheese - all authorized - pound				
8.00	Fruit and Vegetables - Cash Value Voucher - $$$				

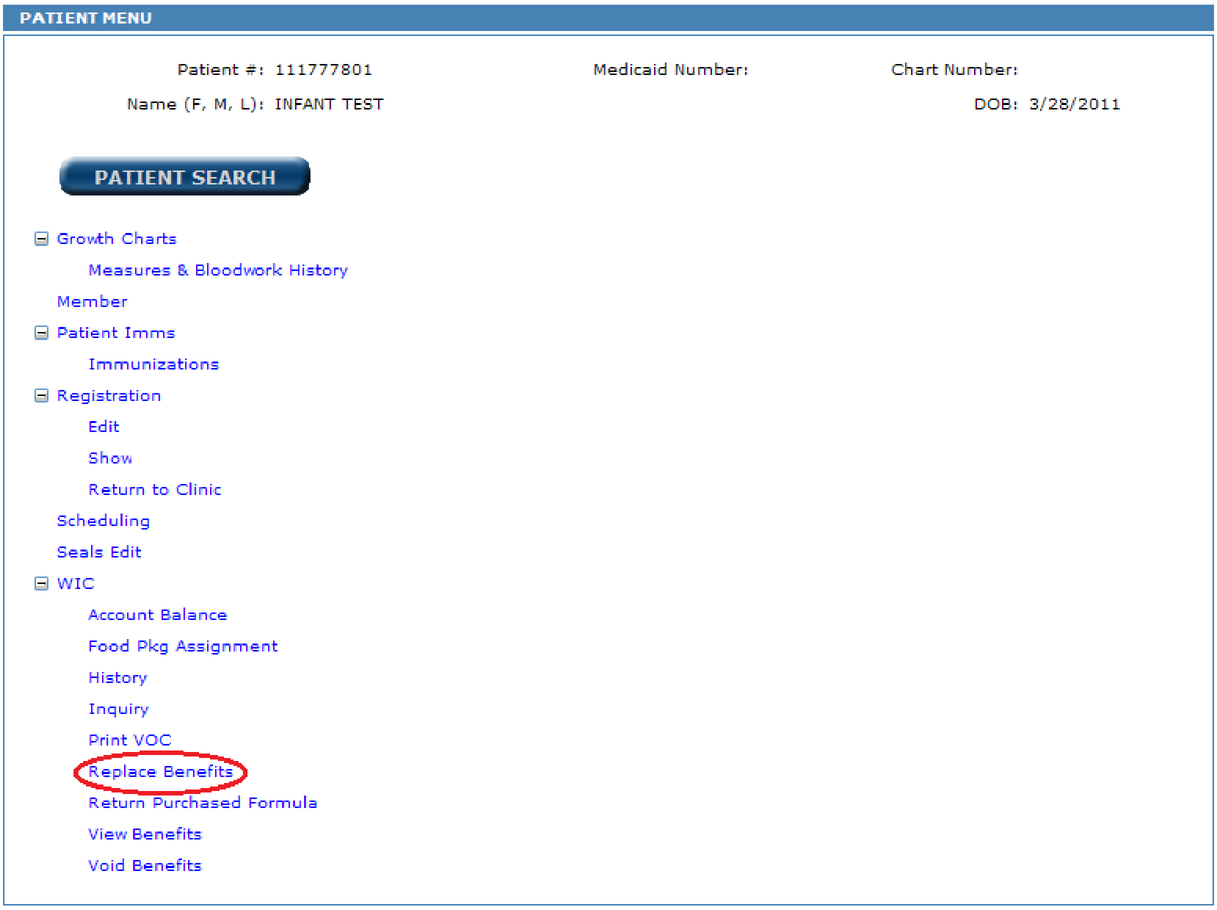
The bottom portion of the screen has the option to enter comments about the patient's food package.

- Click SAVE to save data entered and return to the **Patient Menu** screen.
- To cancel without saving data entered, click CANCEL.

6.7.2 REPLACE BENEFITS

Patient Menu screen

To access the **Replace Benefits screen** from the Patient Menu screen, click the Replace Benefits link. Replace Benefits is used to replace a patient's existing food package.



6.7.2.1 REPLACING A FOOD PACKAGE WITH THE SAME FOOD PACKAGE

The Issuance Replacement screen shows Patient Details, the remaining Benefits, Void Reason, Food Package, Comments, and Issuance Information.

***Note that the Food Package panel may only show the Food Package, depending on user security access.

PATIENT

HLS	Household #	Number	Name	Birth Date	Patient Age	PEF #
500-500	96	111011111	LAUREN A SMITH	11/09/2006	2 Years & 6 Months	25001014

Status	Priority	Action Date	Action	Recertification/Terminate Due
Child	1	05/27/2009	A - Add	

RTC

ISSUANCE REPLACEMENT

MONTH 1 - FROM 7/2/2009 TO 8/1/2009

☐ Void Entire Issuance

Check #774

Quantity Available	Subcategory
36.00	Cereal (Adult) - all authorized hot and cold
3.00	Cheese - all authorized
2.00	Eggs - all authorized
1.00	All authorized dry legumes (bean & peas) or peanut
8.00	Fruit and Vegetables - Cash Value Voucher
24.00	Whole fluid milk
4.00	Juice - All categories - 12 oz frozen or 48 oz liq

MONTH 2 - FROM 8/2/2009 TO 9/1/2009

☐ Void Entire Issuance

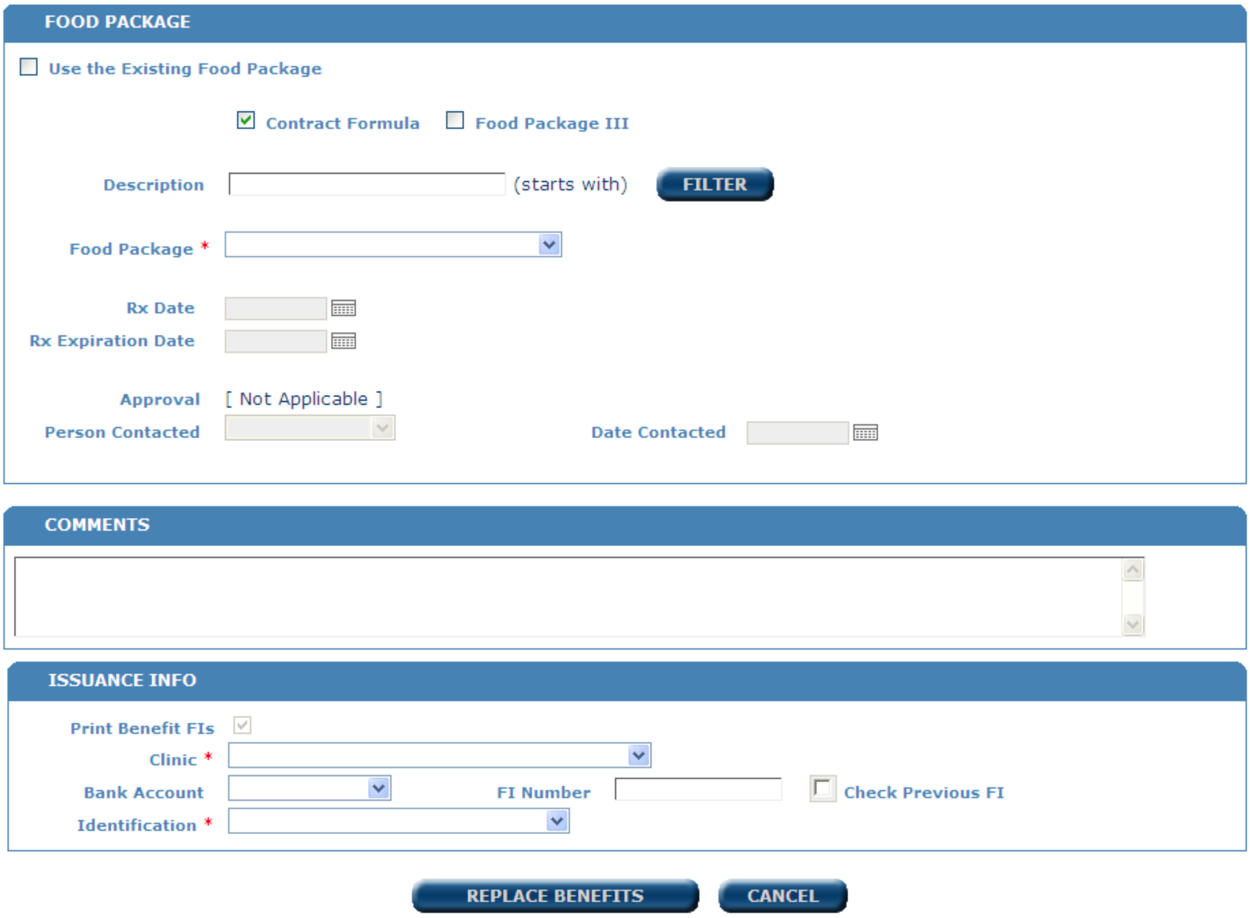
Check #775

Quantity Available	Subcategory
36.00	Cereal (Adult) - all authorized hot and cold
3.00	Cheese - all authorized
2.00	Eggs - all authorized
1.00	All authorized dry legumes (bean & peas) or peanut
8.00	Fruit and Vegetables - Cash Value Voucher
24.00	Whole fluid milk
4.00	Juice - All categories - 12 oz frozen or 48 oz liq

VOID REASON

Void Reason *

****Screen continues on the next page.*



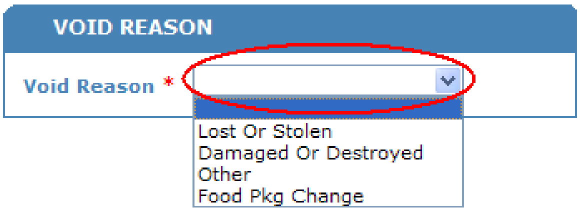
Patient Details

The first section is the **Patient Section**. This has specific patient information including: **HLS, Household #, Name, Birth Date, Patient Age, PEF** (Patient Encounter Form) **#, Status, Priority, Action Date, Action, and Recertification/ Termination Due.**

- Select the ☐ next to the month for which benefits are being voided.

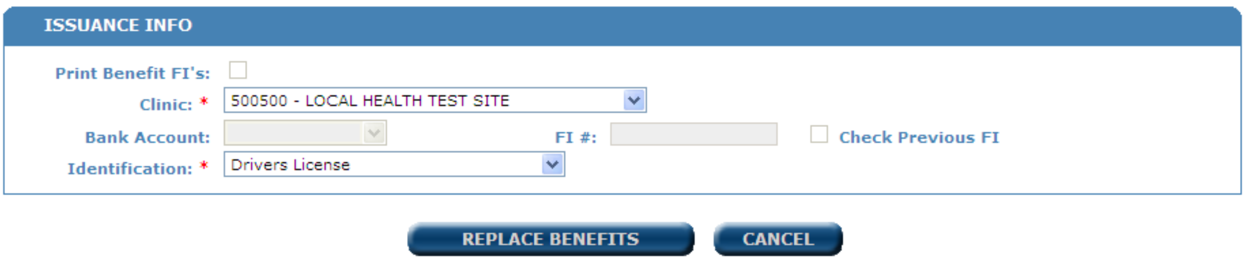
Quantity Available	Subcategory
36.00	Cereal (Adult) - all authorized hot and cold
3.00	Cheese - all authorized
2.00	Eggs - all authorized
1.00	All authorized dry legumes (bean & peas) or peanut
8.00	Fruit and Vegetables - Cash Value Voucher
24.00	Whole fluid milk
4.00	Juice - All categories - 12 oz frozen or 48 oz liq

- Use the drop-down menu  to select a **Void Reason**: Lost or Stolen, Damaged or Destroyed, Other, or Food Pkg Change.



- Select “Use the Existing Food Package” to replace with the same food package. Note that access to this function depends on user security.

- Use the drop-down menu to select a Clinic, and an Identification type under the **Issuance Information** section.

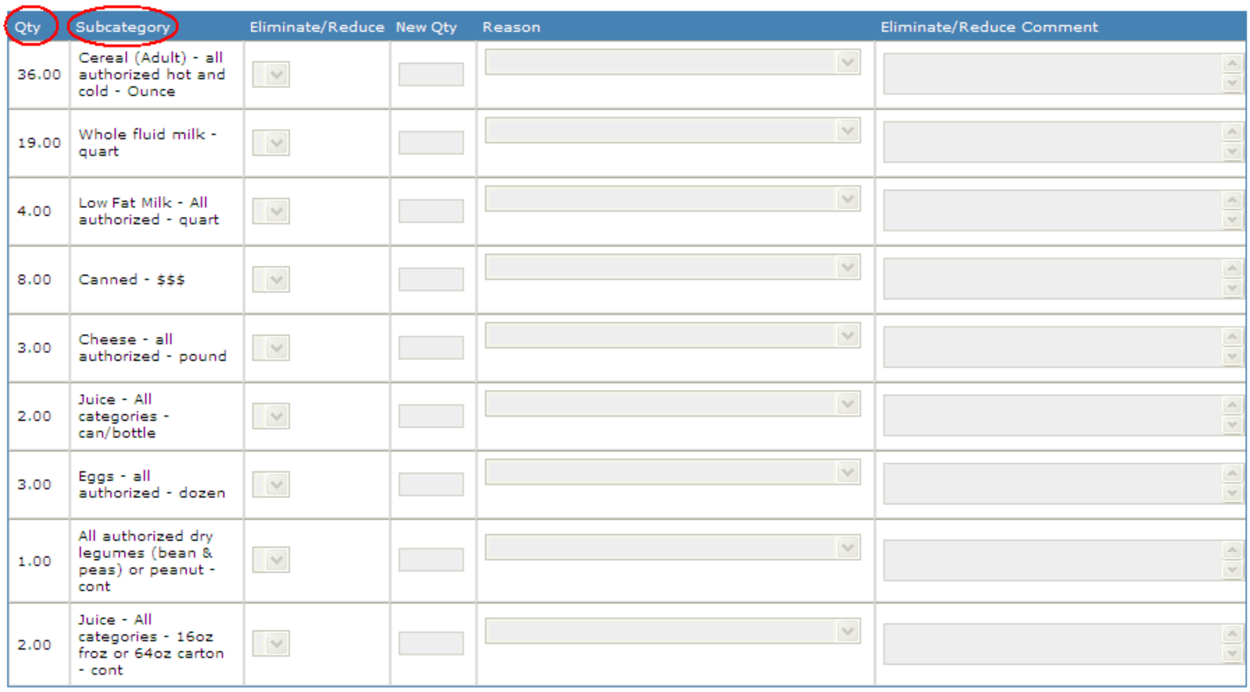


- Click .

6.7.2.2 REPLACING A FOOD PACKAGE WITH A DIFFERENT FOOD PACKAGE

To replace an existing food package with a different food package, follow all the steps in the previous section, Replacing A food Package with the Same Food Package. In the **Food Package** section, however, use the drop-down menu to select a new food package. To narrow results, type a description in the search filter and click FILTER. Note that access to this function depends on user security.

A chart displaying all of the contents of the new food package will be displayed. This includes the Subcategories with the measures for the food items, and Quantities of each. For example, Cheese is measured in pounds, and the food package below contains 3 pounds of cheese.



Qty	Subcategory	Eliminate/Reduce	New Qty	Reason	Eliminate/Reduce Comment
36.00	Cereal (Adult) - all authorized hot and cold - Ounce				
19.00	Whole fluid milk - quart				
4.00	Low Fat Milk - All authorized - quart				
8.00	Canned - $$$				
3.00	Cheese - all authorized - pound				
2.00	Juice - All categories - can/bottle				
3.00	Eggs - all authorized - dozen				
1.00	All authorized dry legumes (bean & peas) or peanut - cont				
2.00	Juice - All categories - 16oz froz or 64oz carton - cont				

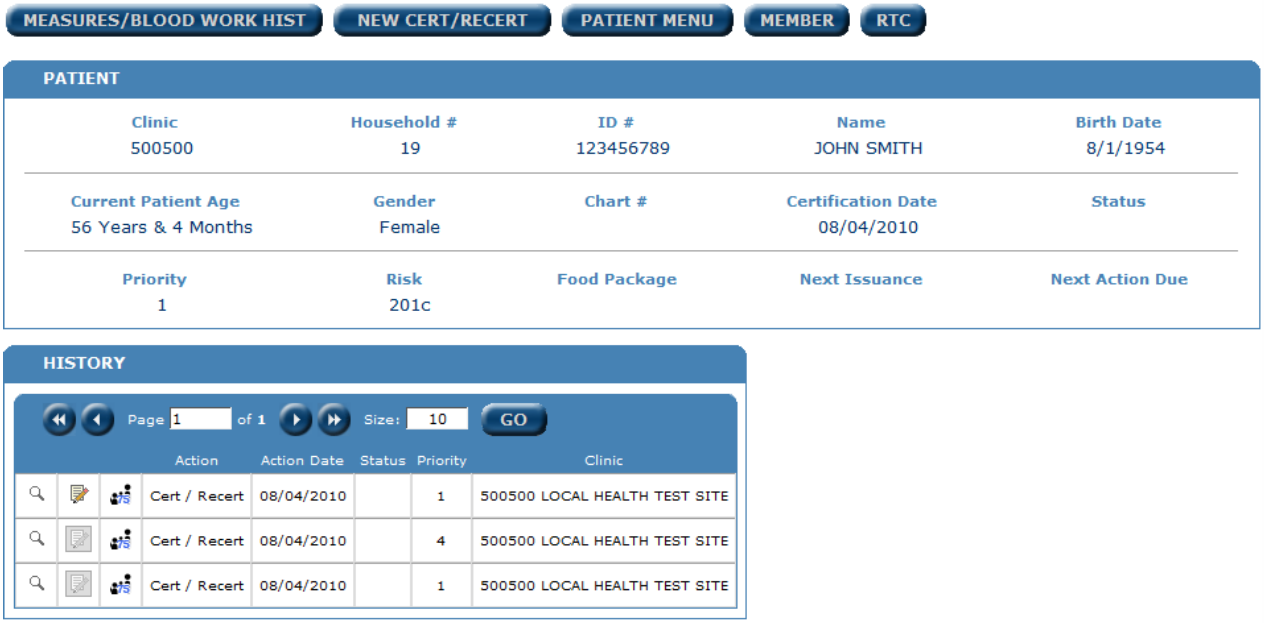
- After completing all steps, click REPLACE BENEFITS.

6.8 WIC HISTORY

Patient Menu screen

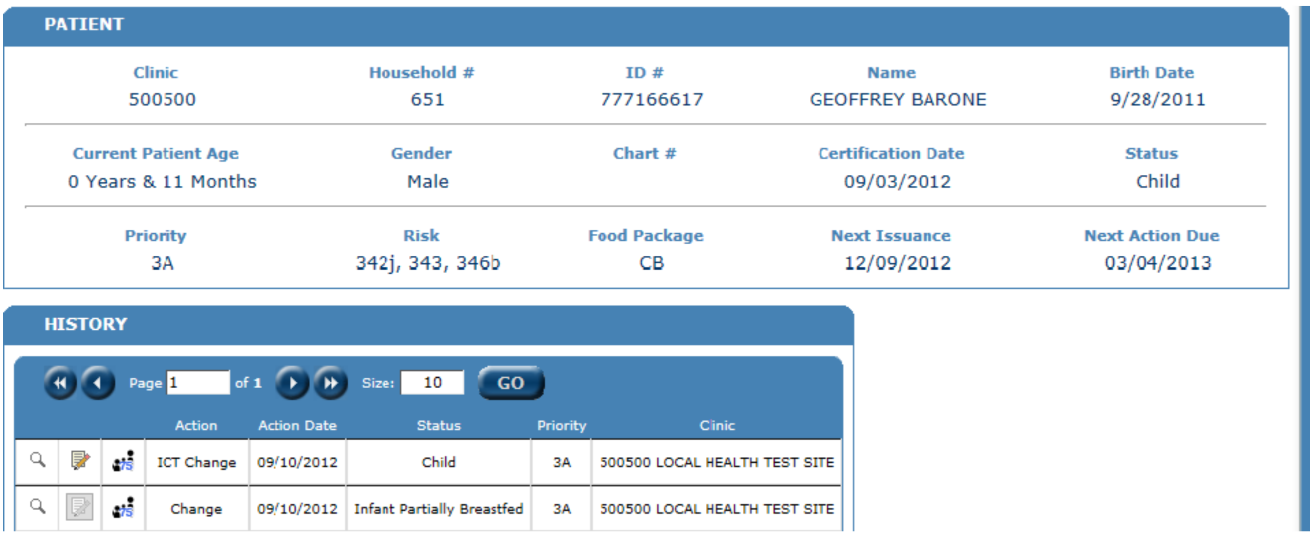
To access the WIC History screen from the Patient Menu screen, click History.

The WIC History screen will be displayed.

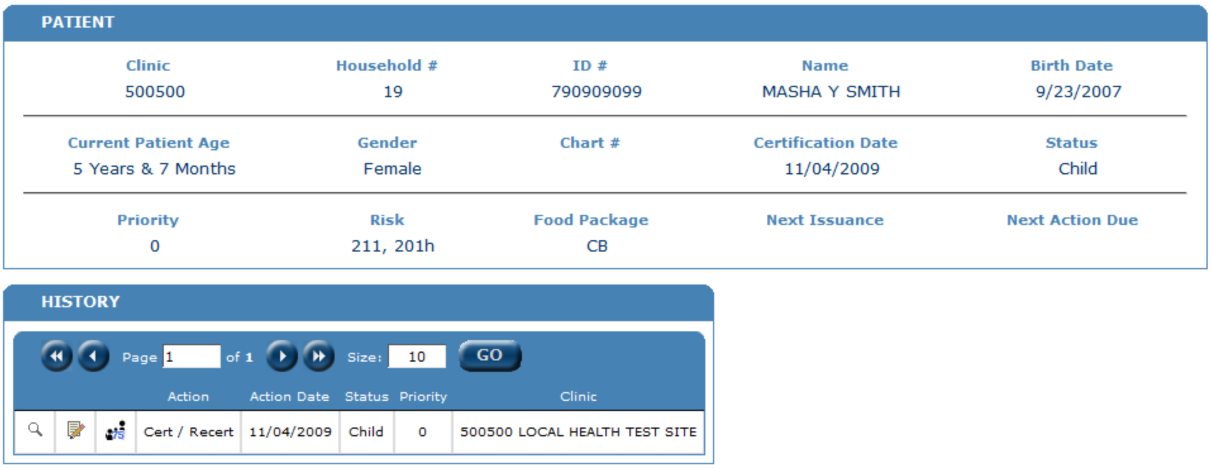


WIC History lists all WIC actions, including certifications and changes. WIC History also provides for viewing and editing information for the most current action.

****Note:* If an ICT has occurred, the action will be displayed on the WIC History screen as an “ICT Change” in the Action field. An example is shown below.



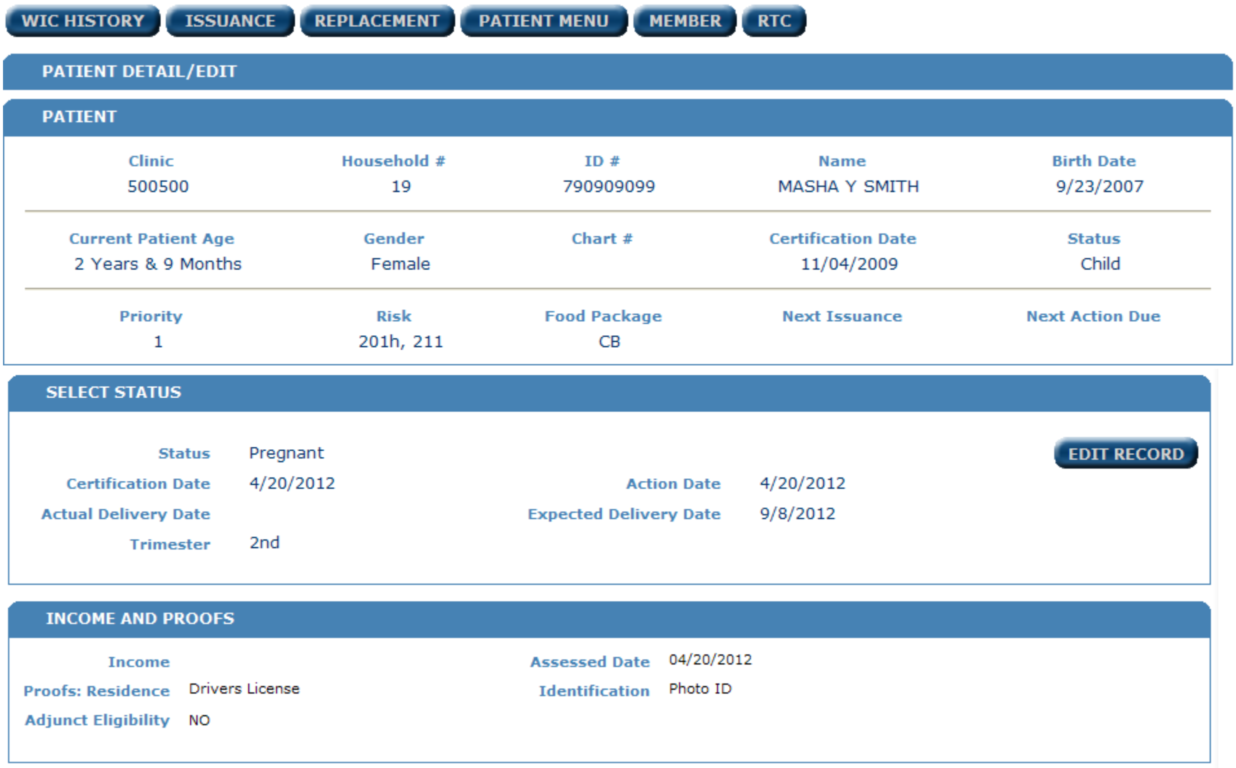
- To view or edit patient details, click the icon.



The Patient Detail screen will be displayed.

6.8.1 PATIENT DETAIL SCREEN

When the Edit icon is clicked on WIC History, a new Patient Detail/Edit screen is displayed that shows the most recent WIC information for that patient.



MEASURES AND BLOOD WORK

MEASURES

Date of Measures	06/25/2010	Recumbent Measure	No	Pregnancy	No
Height	ft in				
Weight	lb oz				
Head Circum	0 cm				
BMI	0				
Comments					

EDIT RECORD

BLOOD WORK

Hgb/HCT Measures Date		Hemoglobin	gm/dL	Hematocrit	%
Lead Measures Date		Lead Count	µg/dL		

PERCENTILES

Date of Measures	6/25/2010	Date of Measures	N/A
Height(%)	N/A	Hemoglobin(gm/dL)	N/A
Weight(%)	N/A	Hematocrit(%)	N/A
Head Circumference(%)	N/A	Lead Measures Date	N/A
Weight for Length(%)	N/A	Lead(µg/dL)	N/A
BMI(%)	N/A		

WIC CERTIFICATION

RISK

201c - Hematocrit <= 32.9% or Hemoglobin <= 10.9 gm/dl (3rd trimester) 27-40 wks

EDIT RECORD

COMMENTS

No comments entered.

PLAN

No plan entered.

***Note: Screen continues onto next page.

The Patient Detail/Edit screen contains panels of information including: Patient, Status, Income and Proofs, Birth Record, Measures and Blood Work, WIC Certification (Risk, Breastfeeding Questions (if age appropriate), Comments and Plan, TV Viewing question (if age appropriate)), Food Package, and Benefits Issued.

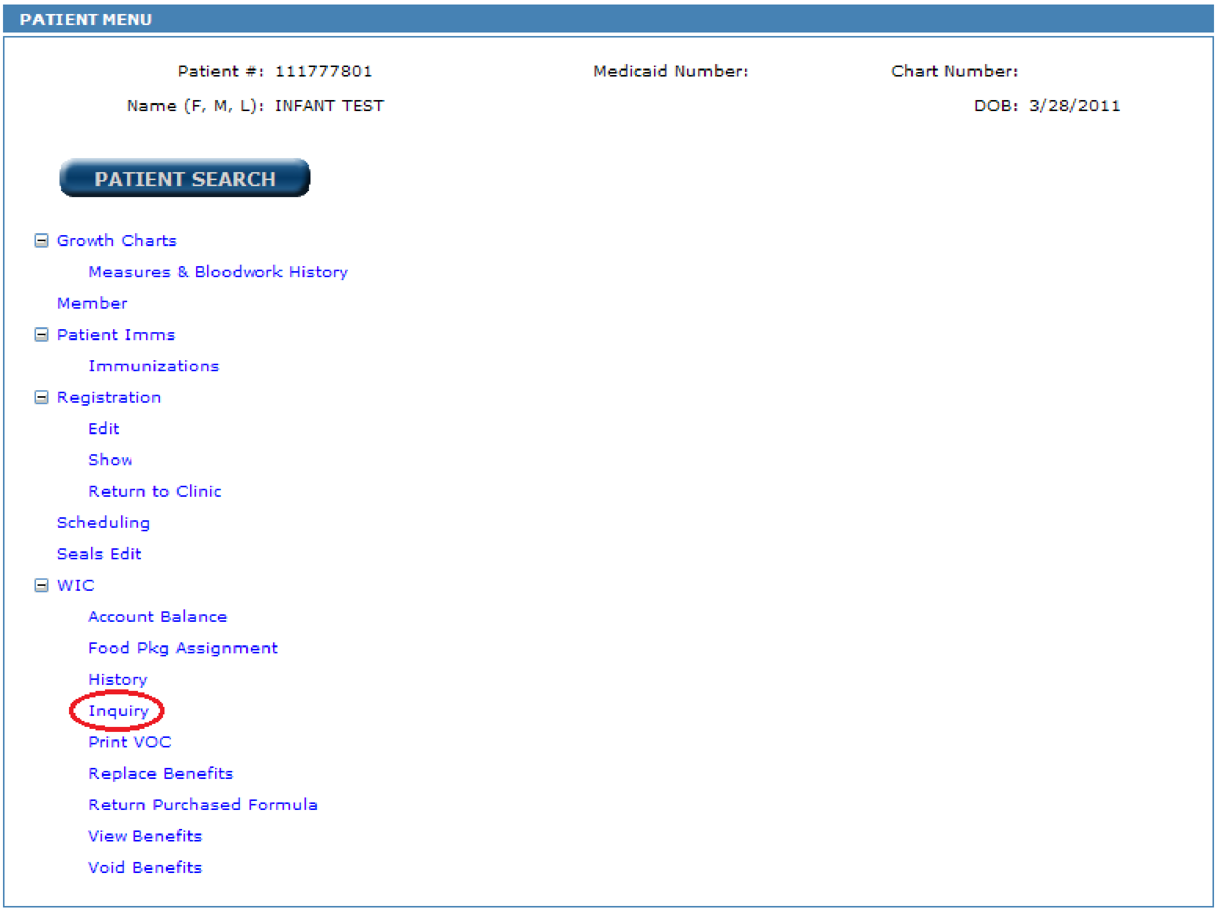
If information can be changed, the panel contains an Edit Record button.

- To make changes from the Patient Detail/Edit screen, click the Edit Record button in the panel of the information to be changed.

6.9 WIC INQUIRY

Patient Menu screen

To access the **WIC Inquiry screen** from the Patient Menu screen, click Inquiry.



A separate window will appear with the household's WIC Inquiry report. This report breaks down the WIC information for each member of the household.

HLS	Household #
	19

Number	Medicaid Number	Name	Birth Date	Patient Age Today	Chart Number
000000001		BORIS K SMITH	04/15/200	1809 years & 11 months	
Status	**Priority**	**Certification Date**	**Next Action Due Date**	**Action**	
Next Issuance Date	**Risk Codes**			**Food Package**	
	None				

Number	Medicaid Number	Name	Birth Date	Patient Age Today	Chart Number
000000002		BORIS K SMITH	04/15/2006	3 years & 11 months	
Status	**Priority**	**Certification Date**	**Next Action Due Date**	**Action**	
	1				
Next Issuance Date	**Risk Codes**			**Food Package**	
	113a, 201h, 211			CB	

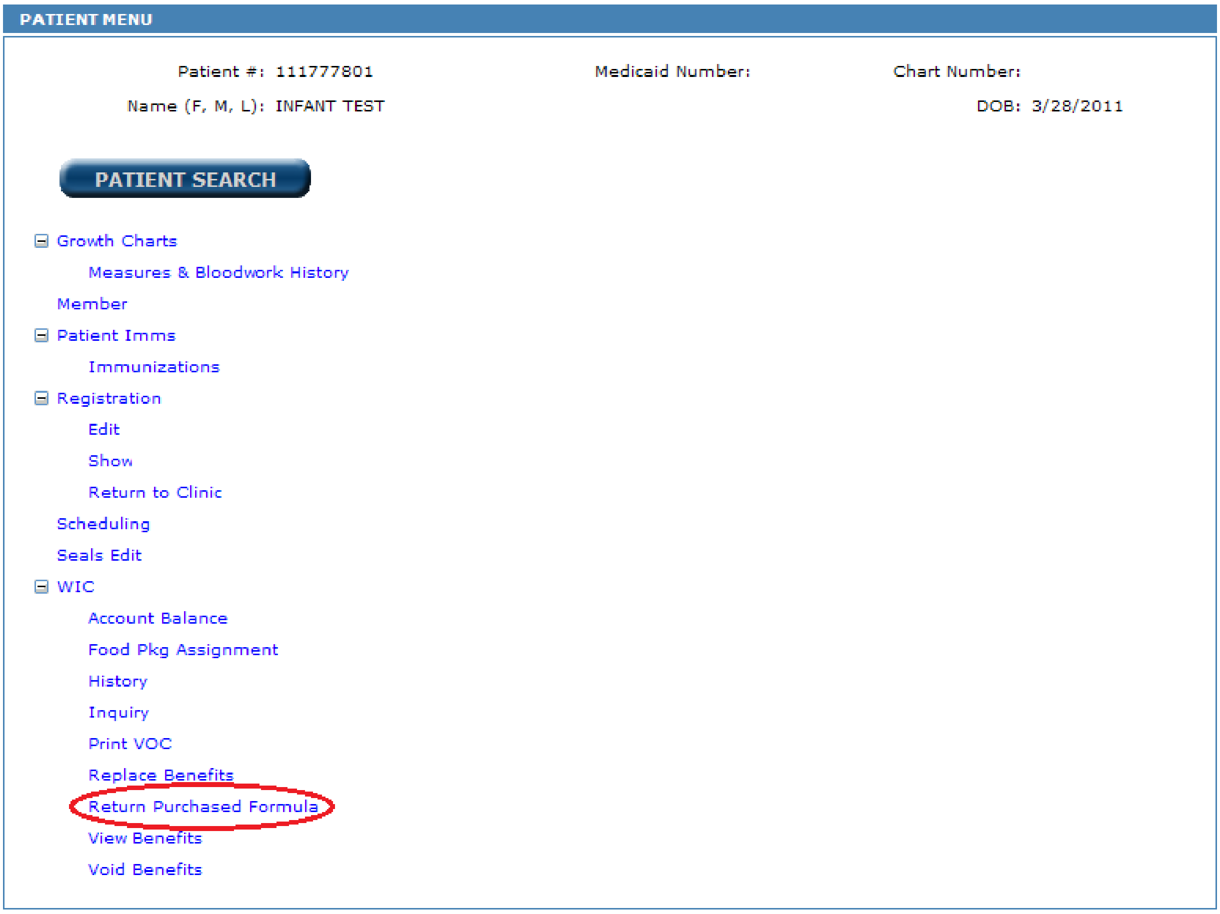
Number	Medicaid Number	Name	Birth Date	Patient Age Today	Chart Number
000000003		ANTONIO K SMITH	02/03/2007	3 years & 2 months	
Status	**Priority**	**Certification Date**	**Next Action Due Date**	**Action**	
	1				
Next Issuance Date	**Risk Codes**			**Food Package**	
	201h, 211			CB	

Number	Medicaid Number	Name	Birth Date	Patient Age Today	Chart Number
123456789		JOHN SMITH	08/01/1954	55 years & 8 months	
Status	**Priority**	**Certification Date**	**Next Action Due Date**	**Action**	
Next Issuance Date	**Risk Codes**			**Food Package**	
	None				

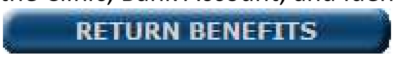
6.10 RETURN PURCHASED FORMULA

Patient Menu screen

To access the Return Formula screen from the Patient Menu screen, click Return Purchased Formula.



The Return Formula screen shows the existing formula purchased.

- To return or replace the formula, enter the Quantity returned.
- Complete the Issuance Info at the bottom of the screen. Use the drop-down menus to select the Clinic, Bank Account, and Identification type. Enter the FI Number, and then click 

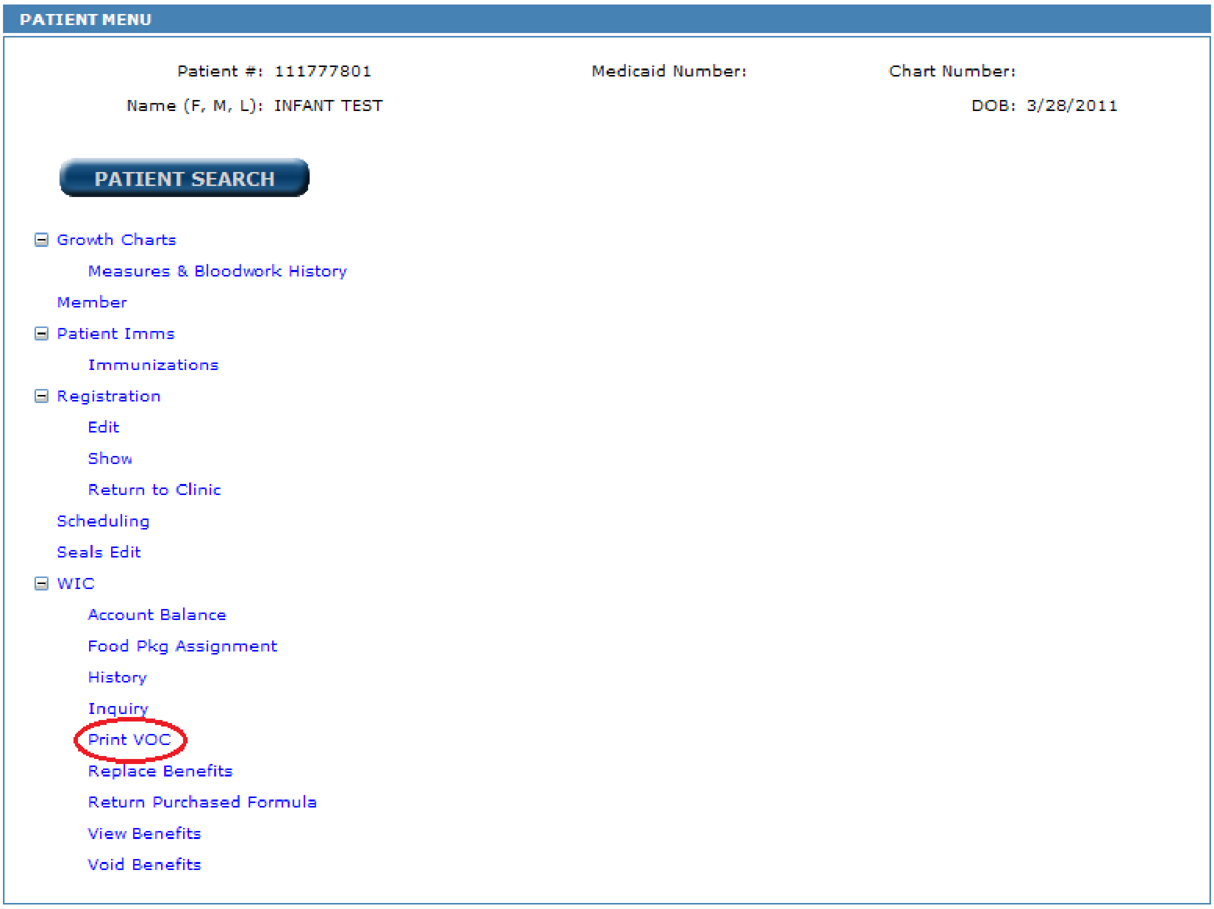
.

**Refer to WIC Procedures Section, 1.1 WIC Benefits*

6.11 PRINT VOC

Patient Menu screen

To view and print the Verification of Certification (VOC) for the patient from the Patient Menu screen, click Print VOC .



The Verification of Certification will be displayed if the person has a current WIC certification.

Kentucky WIC Program
Verification of Certification

Patient Information

HH #	40	Certification Date	06/11/2010
Name	BRAD PITT	Certification End Date	06/01/2011
Gender	Male	Age	0 Years 0 Months 17 Days
Birth Date	06/01/2010	Status	Infant Fully Formula
EDC		Priority	1

Height & Weight

Date of Measures	06/11/2010
Height	1 ft. 6 in.
Weight	6 lbs. 5 oz.
BMI	13.70
Gestational Age	
PPW	0 LB 0 KG

Bloodwork

Date of Measures	06/11/2010
Hemoglobin	12.70 gm/dL
Hematocrit	10.80 %
Lead Count	11.60 µg/dL

Additional Information

Breastfeeding No Ever Breastfed Yes How Long (Weeks) 0 Days 0

Age in Weeks Formula or Other Food Given

Risk Assessment

Risk Code	Priority	Referral
2066 - 151b - Growth Problems (Large for gestational age) (birth weight >= 9lbs/4,000 gm	1	Medical Nutrition Therapy
1020 - 211 - Elevated Blood Lead (>= 10 ug/dl) within the past 12 months	1	

Food Package

Not Applicable

Issuance Information

Last Issuance

Next Issuance

Agency KY DIVISION OF LOCAL HEALTH

Clinic LOCAL HEALTH TEST SITE

Frankfort, KY, 40601

Phone # (502) 695-1999

Signature: ______________________________ Date: 06/18/2010

Janet Johnson

The VOC displays Patient Information, Certification Date, Height & Weight, Blood Work, and Additional Information (Breastfeeding, Risk Assessment, and Food Package, if applicable).

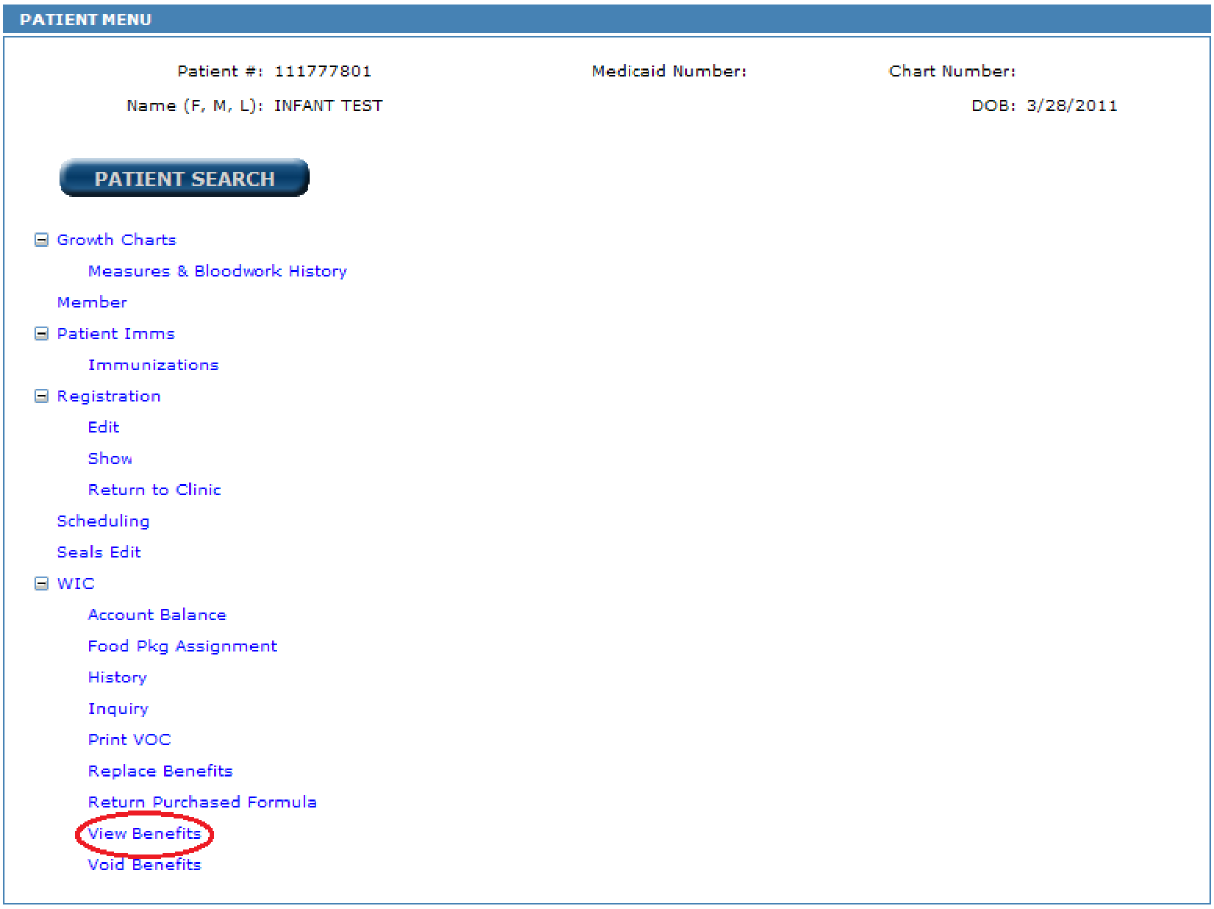
- Click the printer icon to print the VOC.

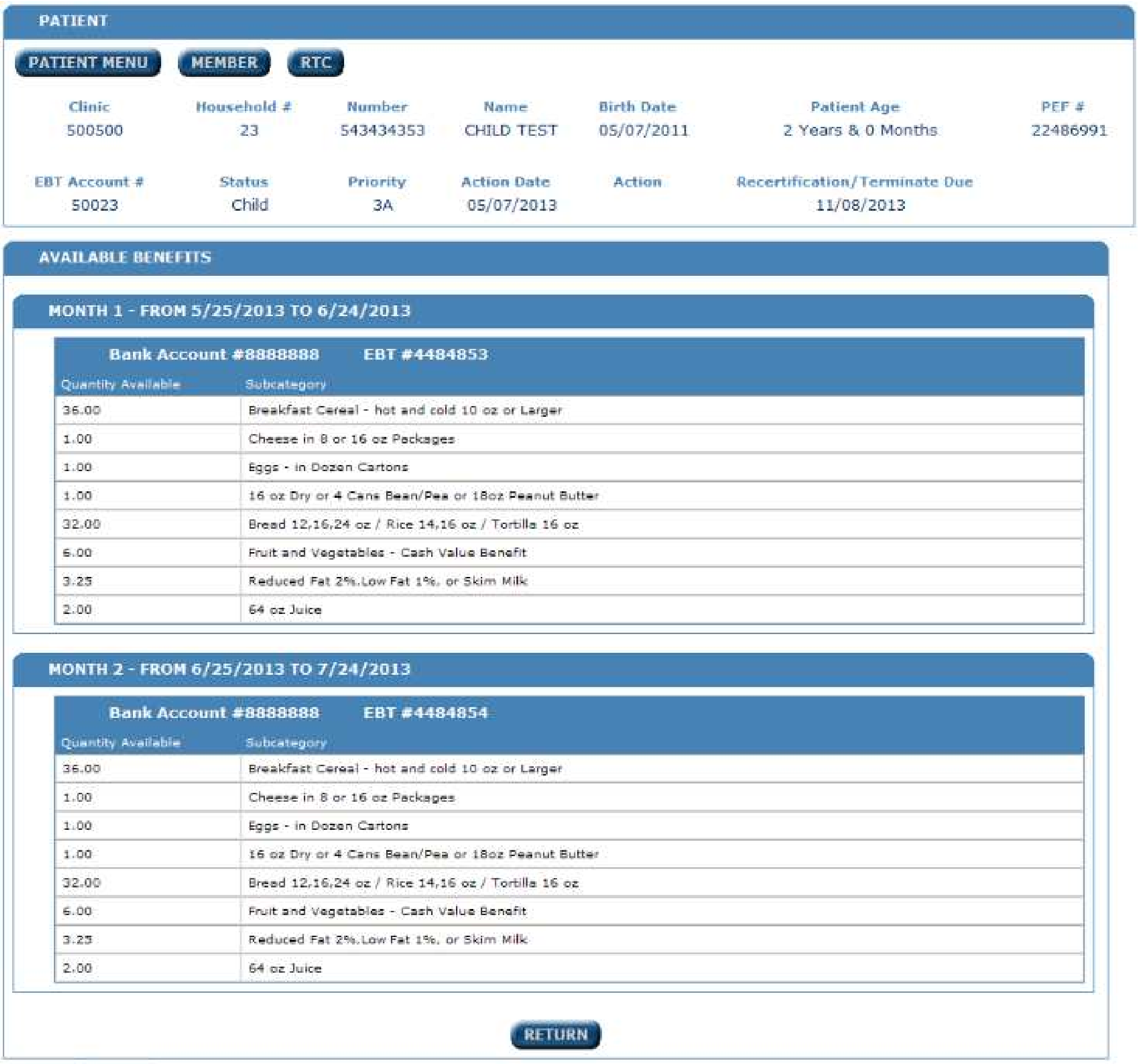
***Note: If the patient does not have a current certification, the message “No Active Certification” will appear after clicking “Print VOC”.*

6.12 VIEW BENEFITS

Patient Menu screen

To access the View Benefits screen from the Patient Menu screen, click View Benefits.



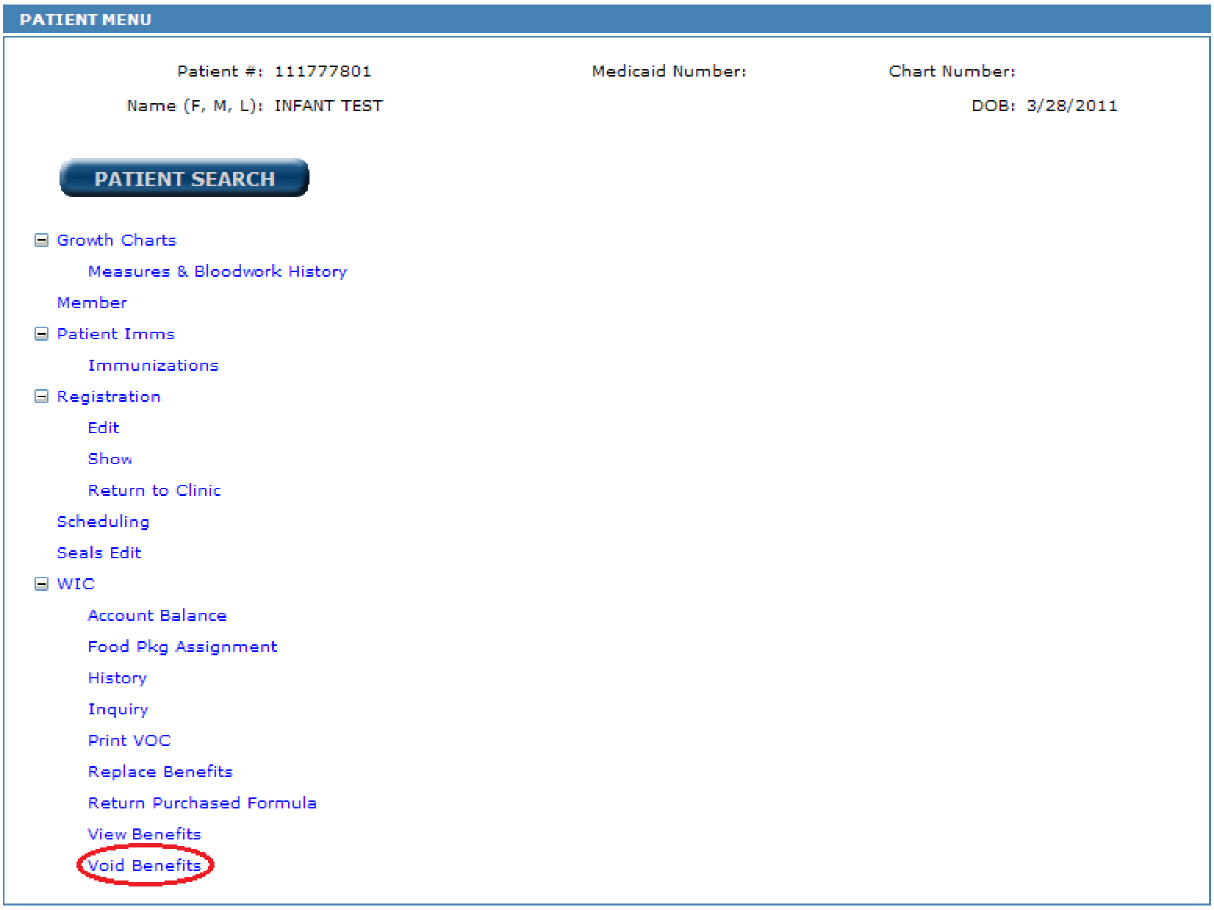


The general patient information will be displayed at the top portion of the screen. The available benefits for the patient will be shown.

6.13 VOID BENEFITS

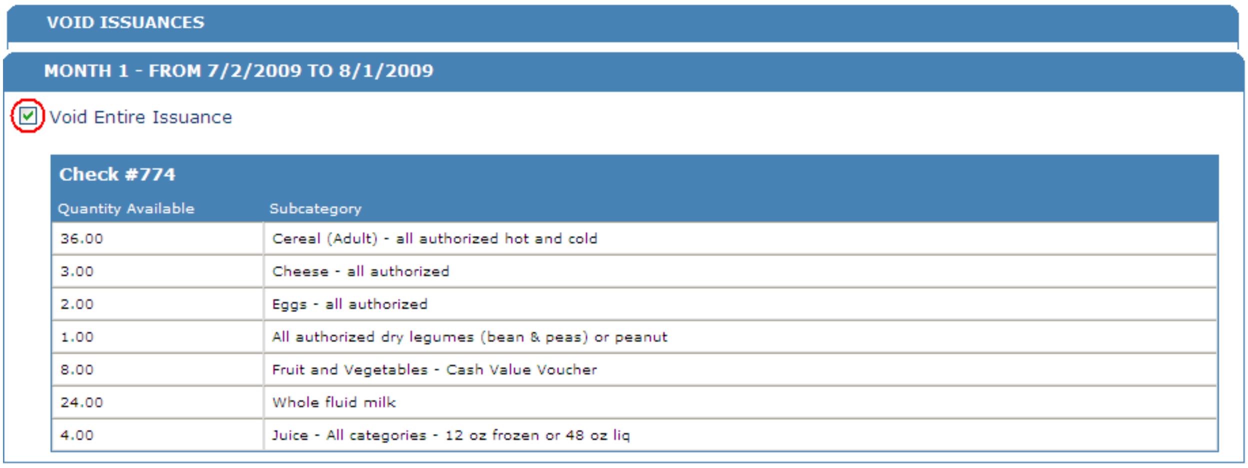
Patient Menu screen

To access the **Void Benefits screen** from the Patient Menu screen, click Void Benefits.



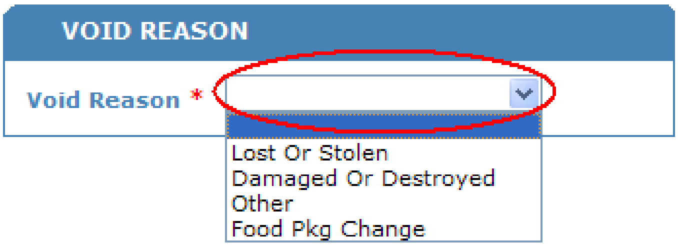
The **Void Issuances** screen will be displayed.

- The Void Issuances screen contains Patient Details, the remaining balance of benefits, and Void Reason.
- Select the ☐ next to the month for which benefits are being voided.



Quantity Available	Subcategory
36.00	Cereal (Adult) - all authorized hot and cold
3.00	Cheese - all authorized
2.00	Eggs - all authorized
1.00	All authorized dry legumes (bean & peas) or peanut
8.00	Fruit and Vegetables - Cash Value Voucher
24.00	Whole fluid milk
4.00	Juice - All categories - 12 oz frozen or 48 oz liq

- Use the drop-down menu  to select a Void Reason (Lost or Stolen, Damaged or Destroyed, Other or Food Pkg Change.



- Click 
.

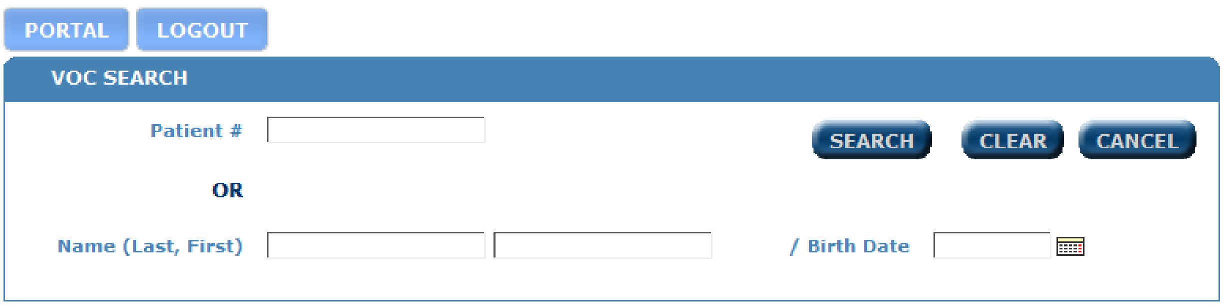
- To cancel without voiding benefits, click 
.

7 VOC SEARCH

VOC Search is used to search for a WIC eligible patient who is transferring to your clinic.

- To access the VOC Transfer, click the VOC Search link on the CDP Portal screen. The VOC Search screen will be displayed.

****Note: If VOC Search does not appear on the list of links on the CDP Portal, contact your supervisor to request access.*



- Enter the Patient # or the patient's First and Last Name and Birth Date, then click SEARCH. Entering the Name may return multiple results. When the results are displayed, click the green arrow corresponding with the patient to be transferred.

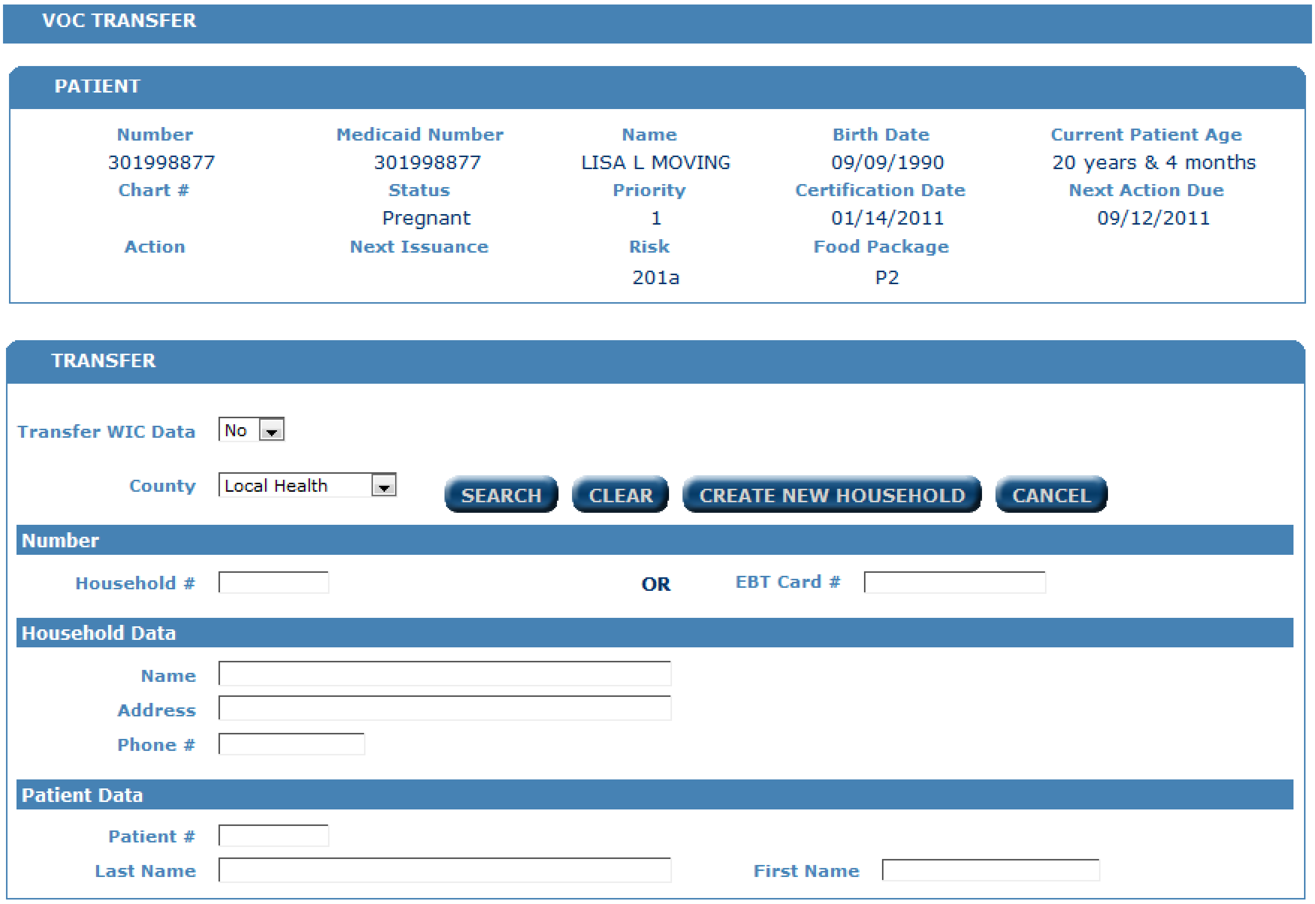
All members of the household with valid certifications will be displayed and available to transfer.

- Check the box next to the patients to transfer, then click TRANSFER VOC.

****Note: If all of the patients in the household are being transferred, check the box for All, then click Transfer VOC.*

**Refer to WIC Procedures Section, 1.5 WIC VOC*

7.1 VOC TRANSFER-PATIENT DEMOGRAPHICS ONLY

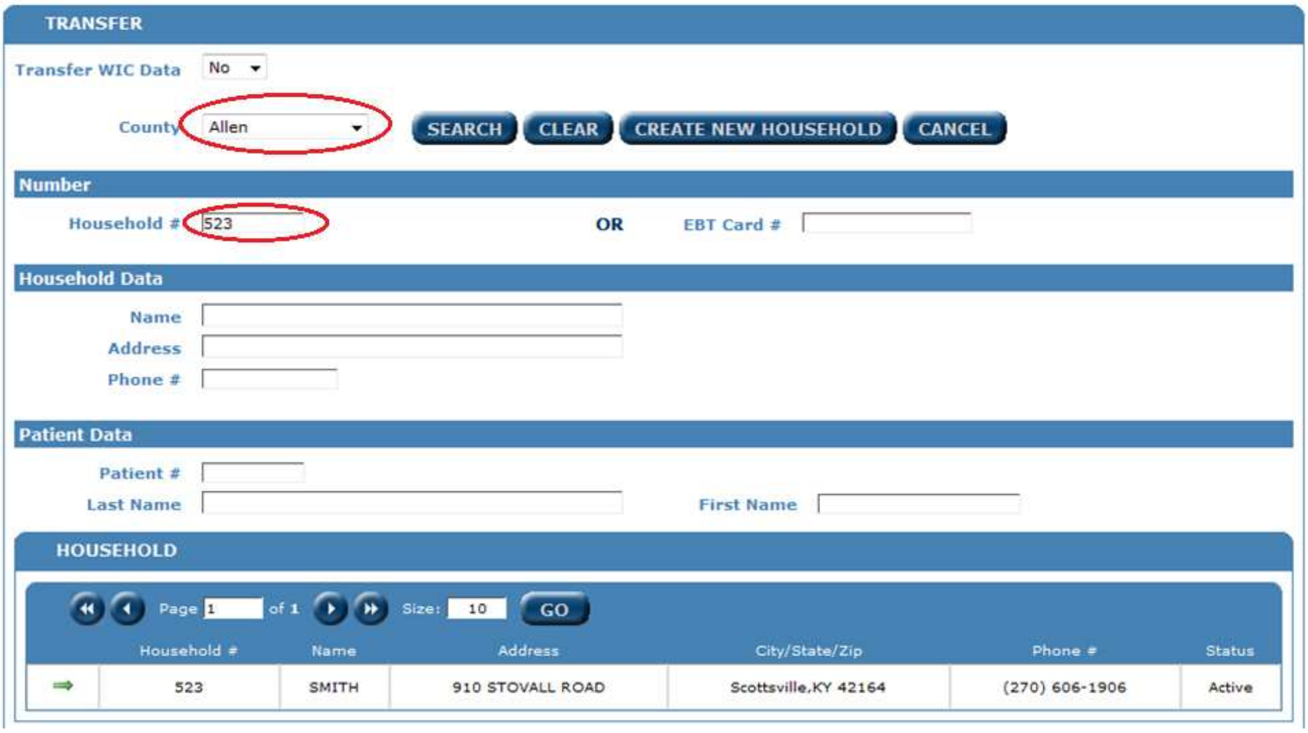


From the VOC Transfer screen, a user can search for an existing household or create a new household to transfer patients to.

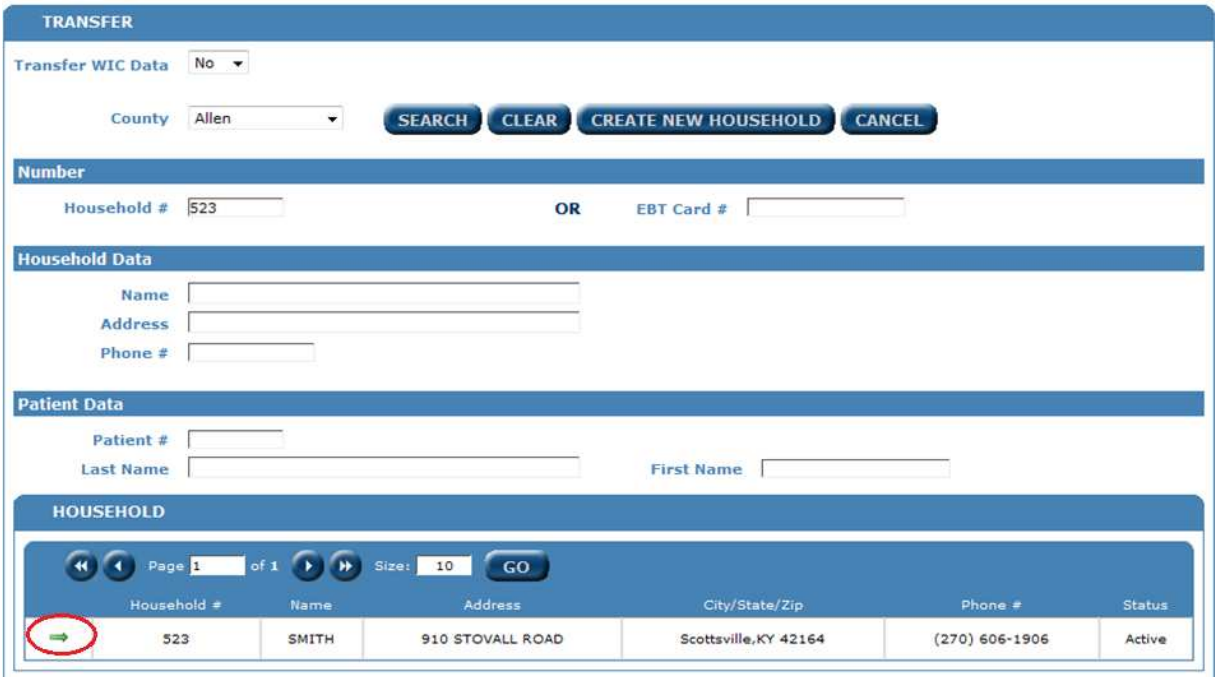
- To transfer patient demographics only (not WIC certification information), use the drop-down menu to select “No” for Transfer WIC Data.
- If the patient is being transferred to an existing household, verify the county listed or use the drop-down menu to select the County. If the patient is being transferred to a new household, click Create New Household. This will display the Transfer Household Add screen.
- Use any of the search filters to find the household. Entering the Household number will return a direct hit.
- Click 

.

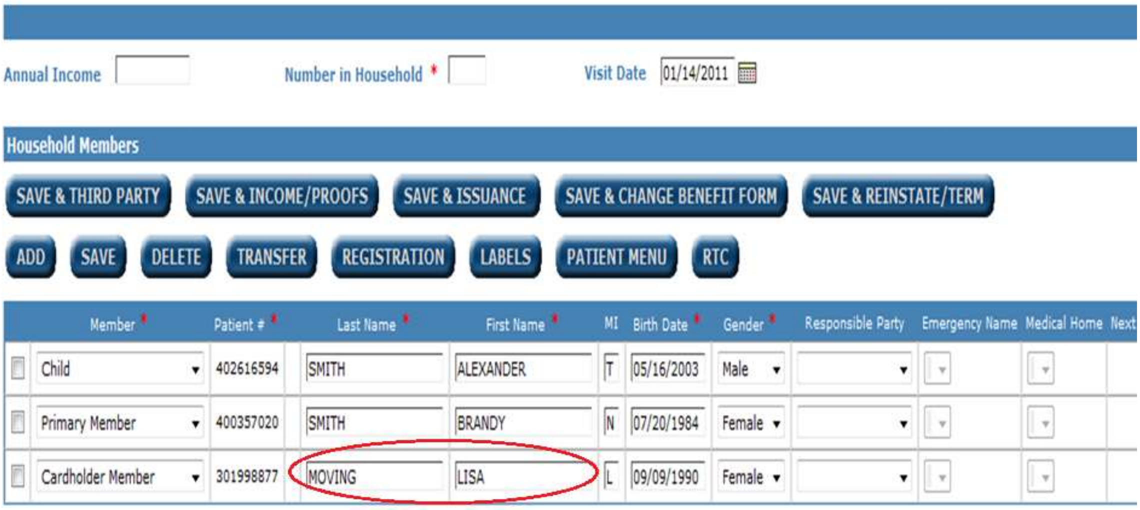
A list of results that match the search criteria will be displayed.



- Click the green arrow next to the household to transfer the patient to that household.

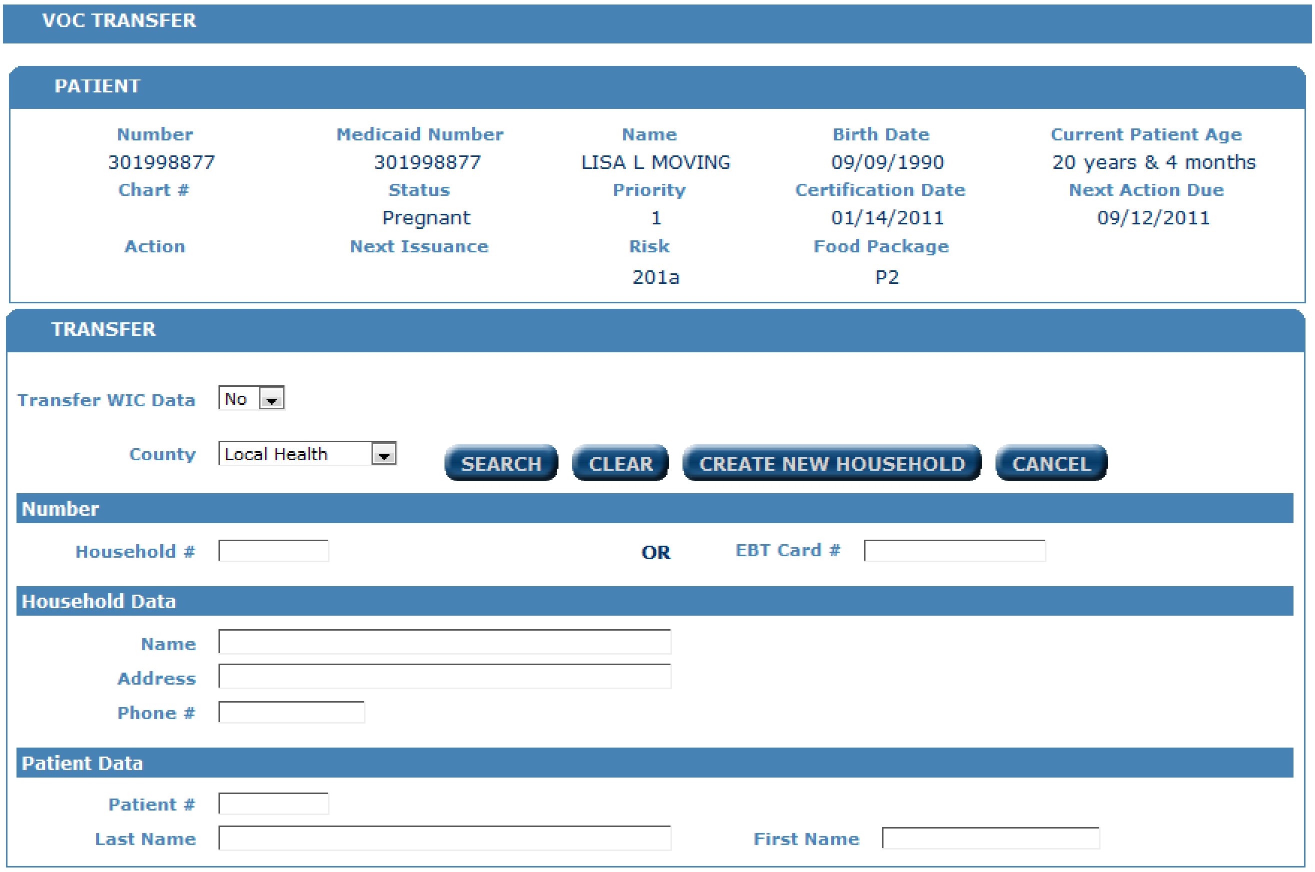


The Household Member screen will be displayed with the new patient listed as a member.



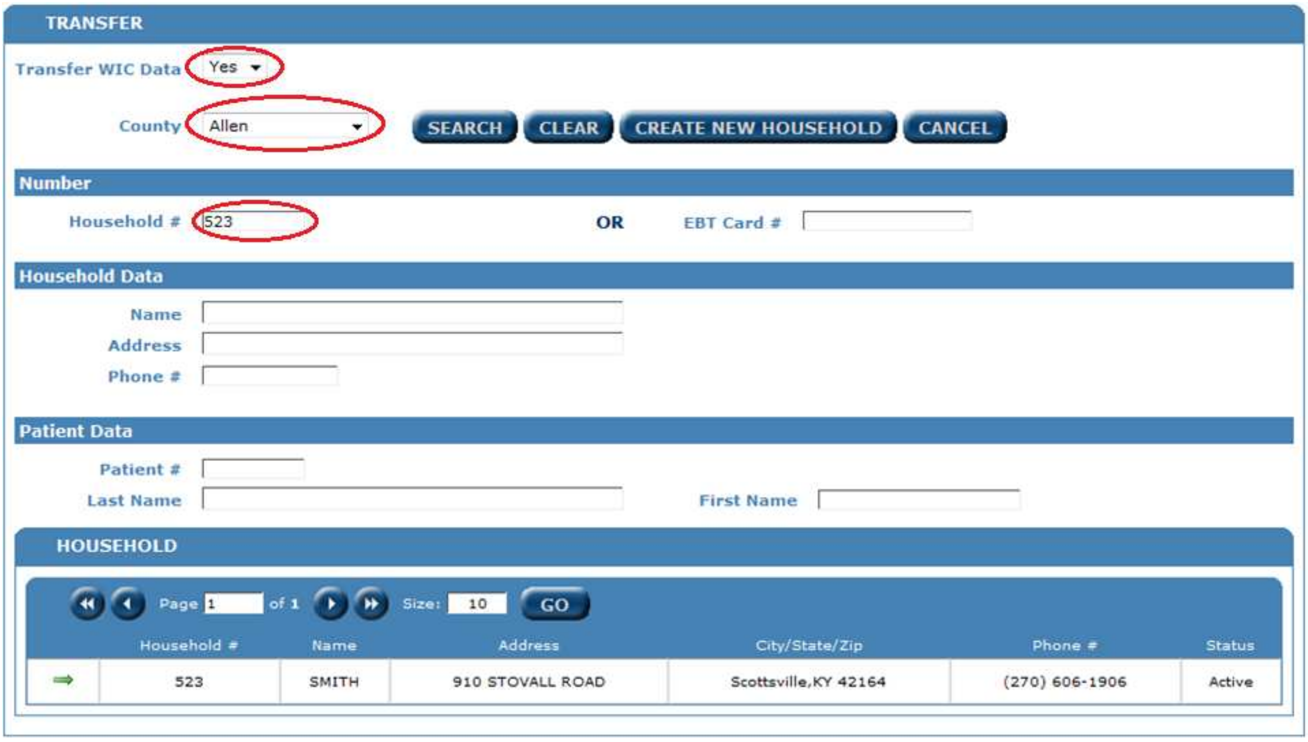
**Refer to WIC Procedures Section, 1.5 WIC VOC*

7.2 VOC TRANSFER-WIC DATA

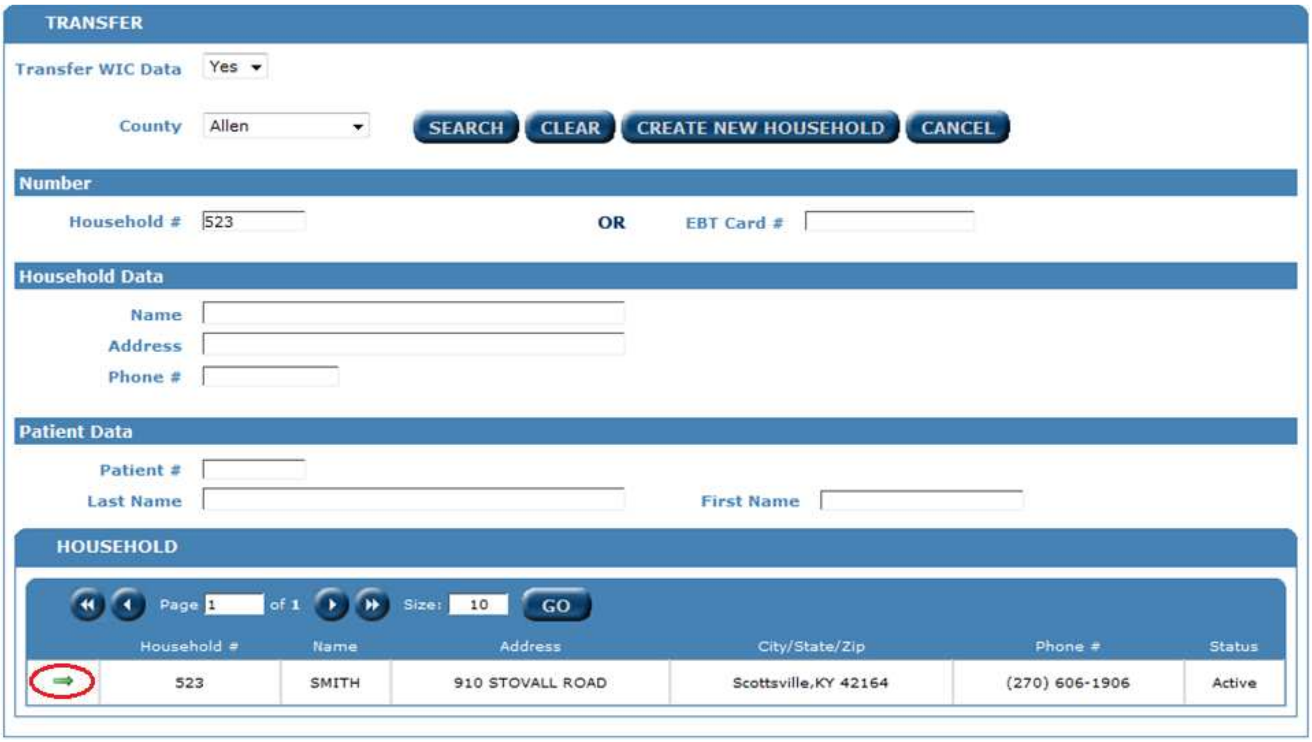


- To transfer WIC Data, use the drop-down menu to select "Yes" for Transfer WIC Data. This will transfer WIC data including eWIC benefits, WIC certification history, food package, and growth chart history.
- If the patient is being transferred to an existing household, use the drop-down menu to select the County. If the patient is being transferred to a new household, click Create New Household. This will display the Transfer Household Add screen.
- Use any of the search filters to find the household. Entering the Household number will return a direct hit.
- Click .

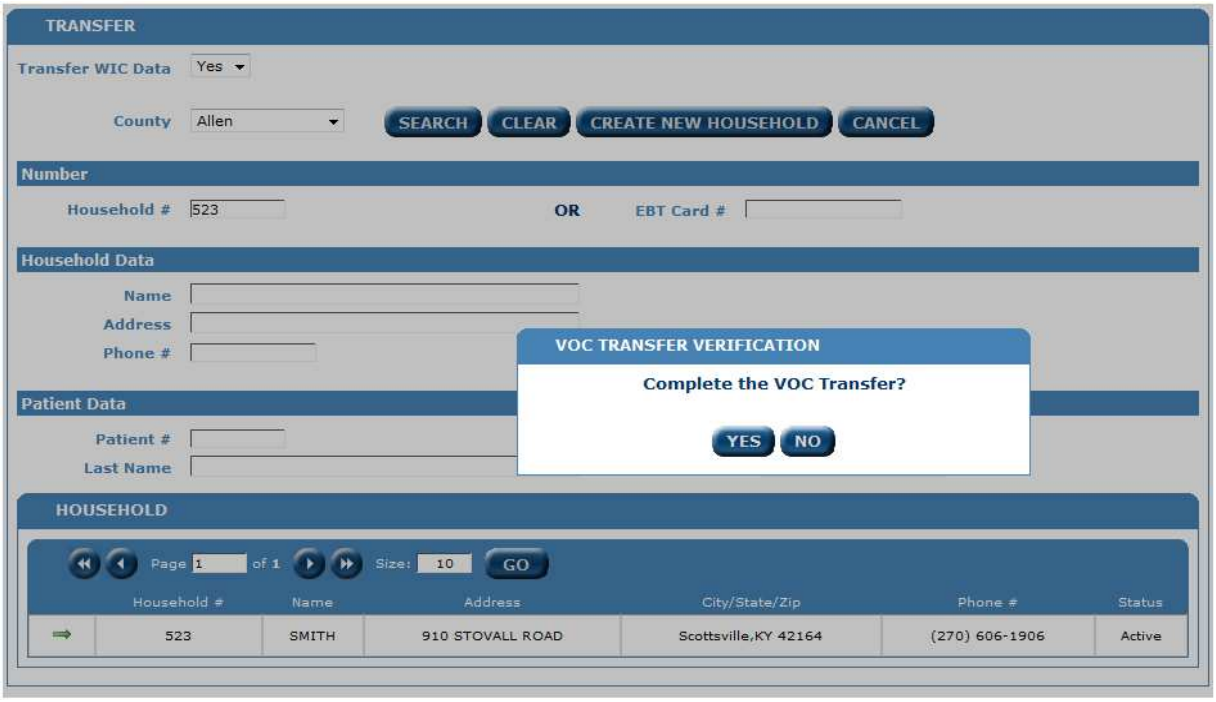
A list of results that match the search criteria will be displayed.



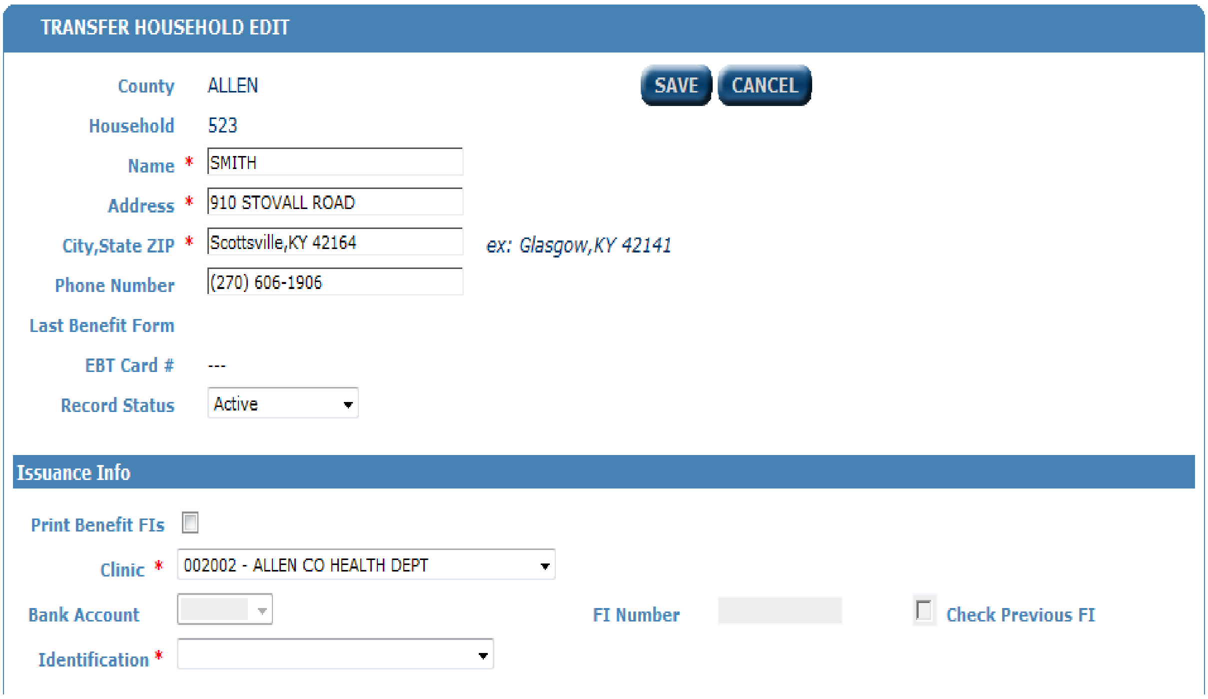
- Click the green arrow next to the household to transfer the patient to that household.



A window will pop up asking to complete the VOC Transfer. Click Yes.

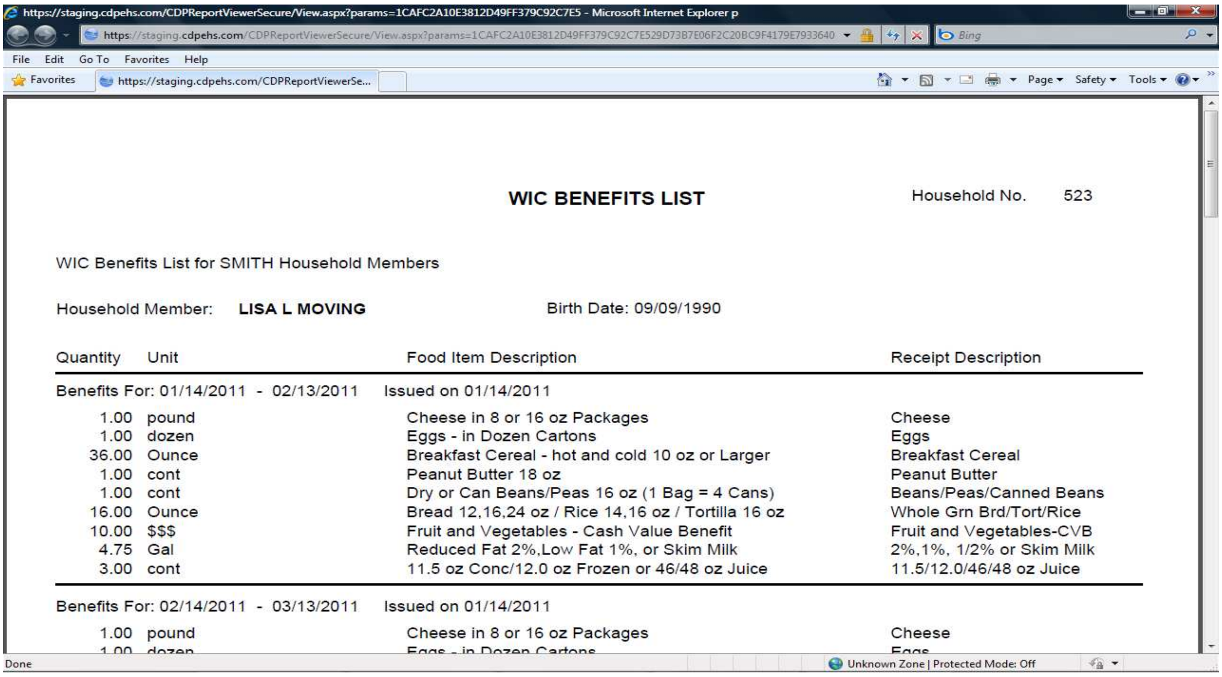


If the transferring patient has benefits, the Household Edit screen will be displayed for entering issuance information.



- If the Household has an eWIC card, click Save. If the Household does not have an eWIC card, click Save & EBT Card Issuance.

- After clicking Save, the patient will be transferred. If the patient has eWIC benefits, a new WIC Benefits list will be displayed with the patient's new Household Number.



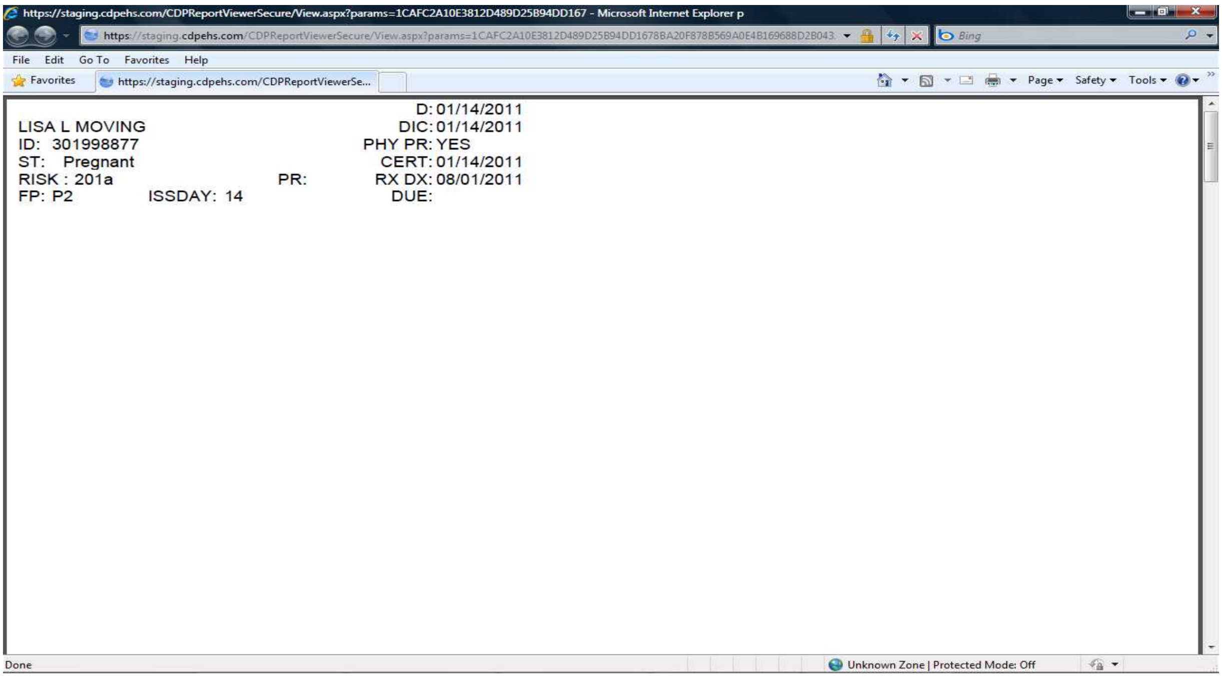
WIC BENEFITS LIST Household No. 523

WIC Benefits List for SMITH Household Members

Household Member: **LISA L MOVING** Birth Date: 09/09/1990

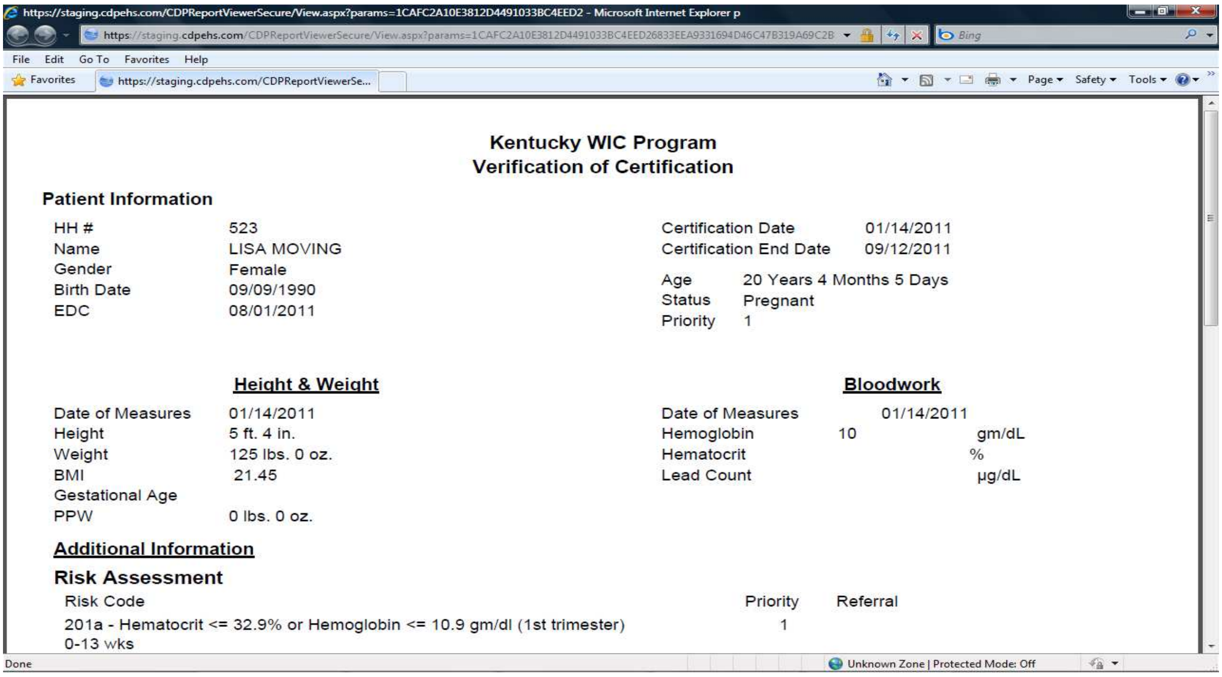
Quantity	Unit	Food Item Description	Receipt Description
Benefits For: 01/14/2011 - 02/13/2011		Issued on 01/14/2011	
1.00	pound	Cheese in 8 or 16 oz Packages	Cheese
1.00	dozen	Eggs - in Dozen Cartons	Eggs
36.00	Ounce	Breakfast Cereal - hot and cold 10 oz or Larger	Breakfast Cereal
1.00	cont	Peanut Butter 18 oz	Peanut Butter
1.00	cont	Dry or Can Beans/Peas 16 oz (1 Bag = 4 Cans)	Beans/Peas/Canned Beans
16.00	Ounce	Bread 12,16,24 oz / Rice 14,16 oz / Tortilla 16 oz	Whole Grn Brd/Tort/Rice
10.00	$$$	Fruit and Vegetables - Cash Value Benefit	Fruit and Vegetables-CVB
4.75	Gal	Reduced Fat 2%,Low Fat 1%, or Skim Milk	2%,1%, 1/2% or Skim Milk
3.00	cont	11.5 oz Conc/12.0 oz Frozen or 46/48 oz Juice	11.5/12.0/46/48 oz Juice
Benefits For: 02/14/2011 - 03/13/2011		Issued on 01/14/2011	
1.00	pound	Cheese in 8 or 16 oz Packages	Cheese

- A VOC label for the patient will be displayed.



D: 01/14/2011
LISA L MOVING DIC: 01/14/2011
ID: 301998877 PHY PR: YES
ST: Pregnant CERT: 01/14/2011
RISK : 201a PR: RX DX: 08/01/2011
FP: P2 ISSDAY: 14 DUE:

- A VOC for the patient will be displayed.



If the patient's new household does not have an eWIC card, the Add Card/Cardholder screen will be displayed. For information on issuing an eWIC card, refer to section eWIC Card Issuance.

**Refer to WIC Procedures Section, 1.5 [WIC VOC]*

8 PATIENT & IMMUNIZATION SEARCH

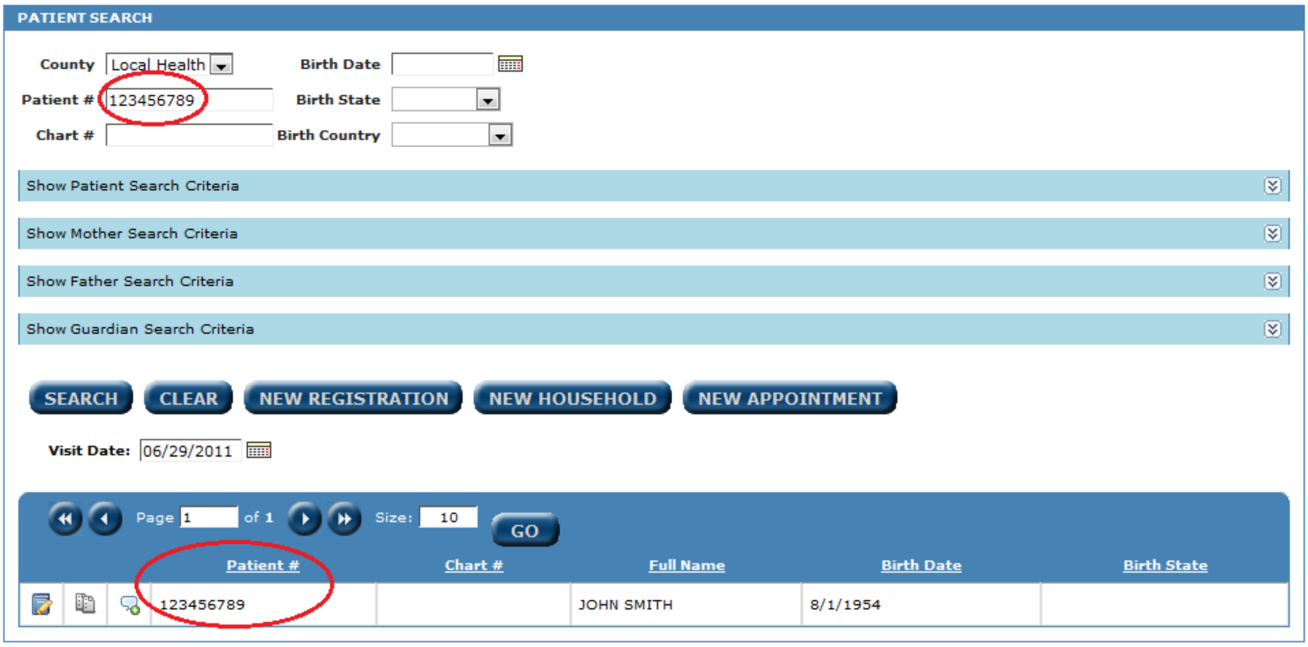
Another common method used for searching for patients in the Clinic Management System is through the Patient & Immunization Search screen. To access the Patient & Immunization Search screen through the CDP Portal, click Patient Search .

The Patient Search screen will be displayed.

- To search for a patient on the **Patient Search screen**, select the County from the drop-down menu. A patient can be found by entering the Birth Date, Patient #, Birth State, Chart #, or Birth Country. Any combination of search fields can be used; however entering the Patient # will return a direct hit.

****Note: The grayed out buttons for New Registration, New Household, and New Appointment cannot be used until a search is performed for the patient.*

Example:



Notice that the patient was found in the system.

From this screen, a user can:

- Go to the patient's Registration screen by clicking the Registration icon next to the Patient #. Refer to section 4.1.3, Registering A New Patient, for information on the Registration screen.
- Copy the patient's registration information by clicking the Copy icon .
- Go to the Patient Menu screen by clicking the Patient Menu icon . Refer to Patient Menu Screen section for information on the Patient Menu screen.

****Note: The previously grayed out buttons for New Registration, New Household, and New Appointment are now available.*

9 FOOD INSTRUMENT/CARD SEARCH

To access the Food Instrument application from the Portal screen, click the FI / Card Range Search link under WIC Card / Food Instrument.

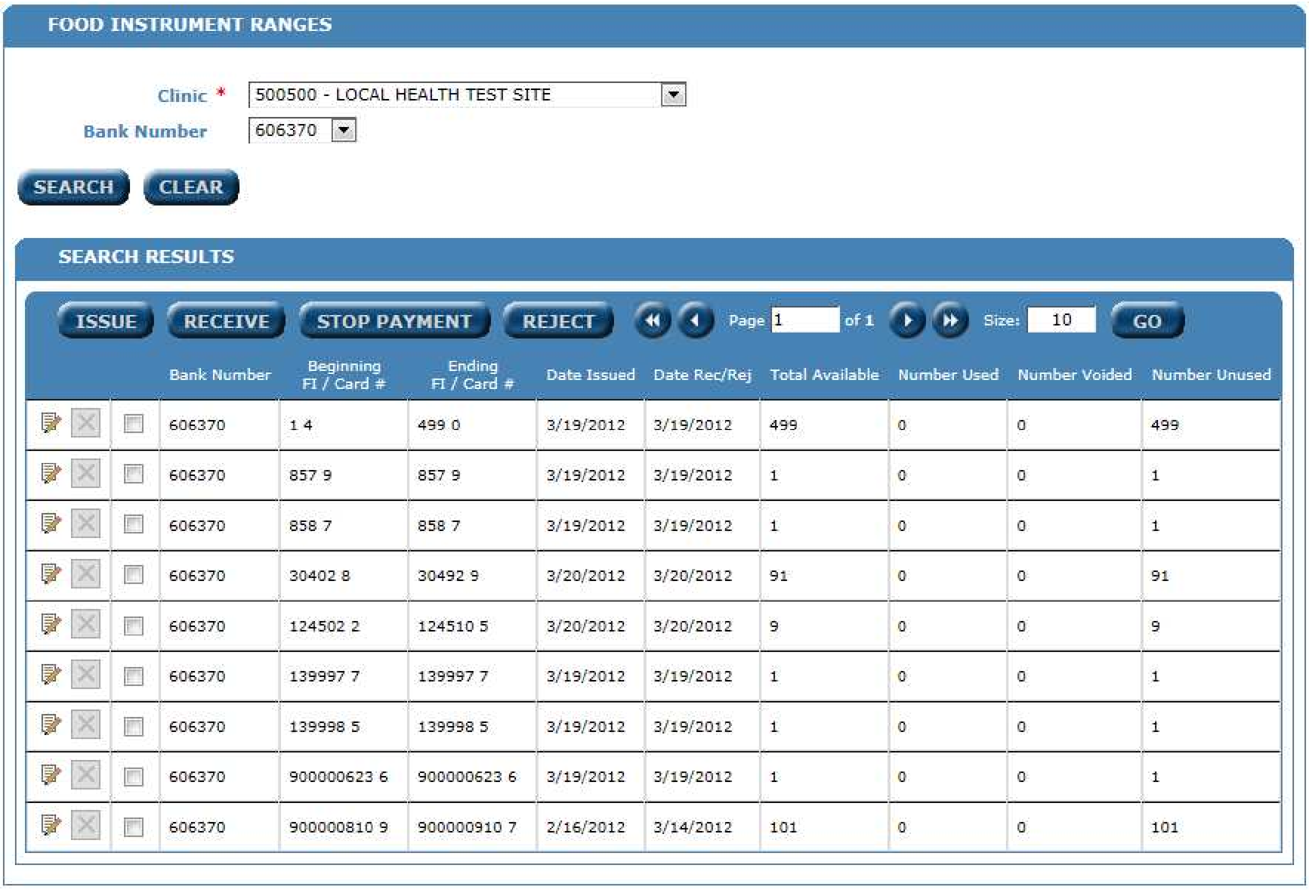
The Food Instrument Ranges Search screen will be displayed.

9.1 FOOD INSTRUMENT RANGES SEARCH

The Food Instrument Ranges Search screen has Clinic and Bank Number drop-down menus.

- To search for a clinic, left-click on the Clinic drop-down menu and select a Clinic. Left- click on the Bank Number drop-down menu and select the desired bank number (606370 Bank Number is for eWIC cards), then click SEARCH.

A list of Search results will be displayed.

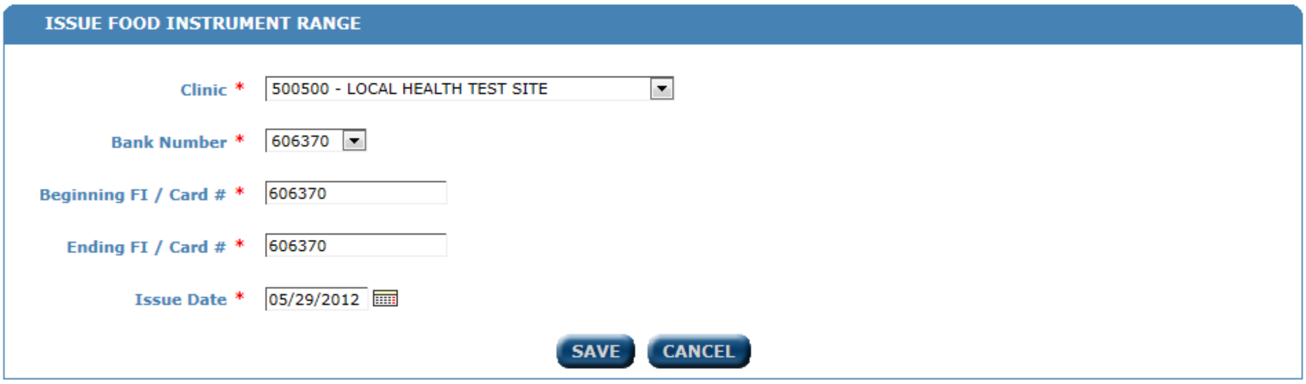


Bank Number	Beginning FI / Card #	Ending FI / Card #	Date Issued	Date Rec/Rej	Total Available	Number Used	Number Voided	Number Unused
606370	1 4	499 0	3/19/2012	3/19/2012	499	0	0	499
606370	857 9	857 9	3/19/2012	3/19/2012	1	0	0	1
606370	858 7	858 7	3/19/2012	3/19/2012	1	0	0	1
606370	30402 8	30492 9	3/20/2012	3/20/2012	91	0	0	91
606370	124502 2	124510 5	3/20/2012	3/20/2012	9	0	0	9
606370	139997 7	139997 7	3/19/2012	3/19/2012	1	0	0	1
606370	139998 5	139998 5	3/19/2012	3/19/2012	1	0	0	1
606370	900000623 6	900000623 6	3/19/2012	3/19/2012	1	0	0	1
606370	900000810 9	900000910 7	2/16/2012	3/14/2012	101	0	0	101

9.2 FOOD INSTRUMENT ISSUE

When food instruments and cards are needed in a clinic, a new Food Instrument Range will need to be issued. The State WIC Office will issue cards and food instruments to a clinic. To issue, click the 

button. The Issue Food Instrument Range screen will be displayed.



- Select the Clinic that the cards or food instruments will be issued to, and verify the correct Bank Number is selected in the Bank Number drop-down menu. If cards are being issued, the Beginning FI/Card # and Ending FI/Card # fields will be auto-filled with the Bank Number, which is also the first six digits of the eWIC card numbers.

- If food instruments are being issued, enter the beginning food instrument number. If cards are being issued, enter the remaining digits of the first card being issued in the Beginning FI/Card # field. The field should then contain the complete eWIC card number.

- If food instruments are being issued, enter the beginning food instrument number. If cards are being issued, enter the remaining digits of the last card being issued in the Ending FI/Card # field. The field should then contain the complete eWIC card number.

- The Issue Date will be auto-filled with today's date. Verify that all information has been entered correctly, then click save.

A message will appear that the eWIC cards were issued successfully.

9.3 RECEIVE FOOD INSTRUMENT

After the State WIC Office has issued a range of eWIC cards to a clinic, the clinic will need to "receive" them in the system before issuing to participants. To receive the cards, click the · FI / Card Range Search link under WIC Card / Food Instrument on the CDP Portal screen.

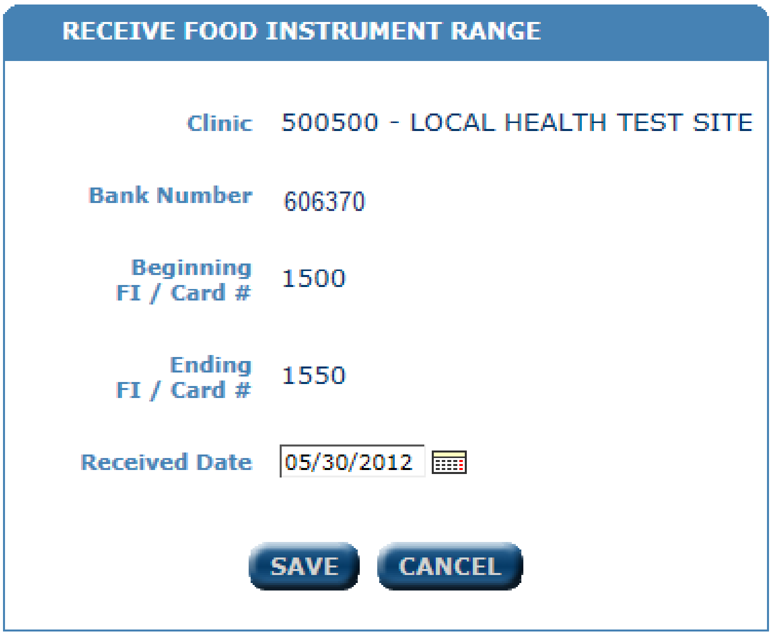
The Food Instrument Ranges Search screen will be displayed.

- To search for your clinic, left-click on the Clinic drop-down menu and select the Clinic. Left- click on the Bank Number drop-down menu and select the bank number to be received (606370 Bank Number is for eWIC cards), then click SEARCH.

A list of any eWIC cards that have been issued to the clinic will be displayed. Cards that have not been received will not have a date in Date Rec/Rej (Received/Rejected) and numbers will be zero.

To receive the range of eWIC cards, check the box next to the range, then click RECEIVE.

The Receive Food Instrument Range screen will be displayed. The information on the card range will be displayed, including: Clinic, Bank Number, Beginning FI/Card #, Ending FI/Card #, and received date.

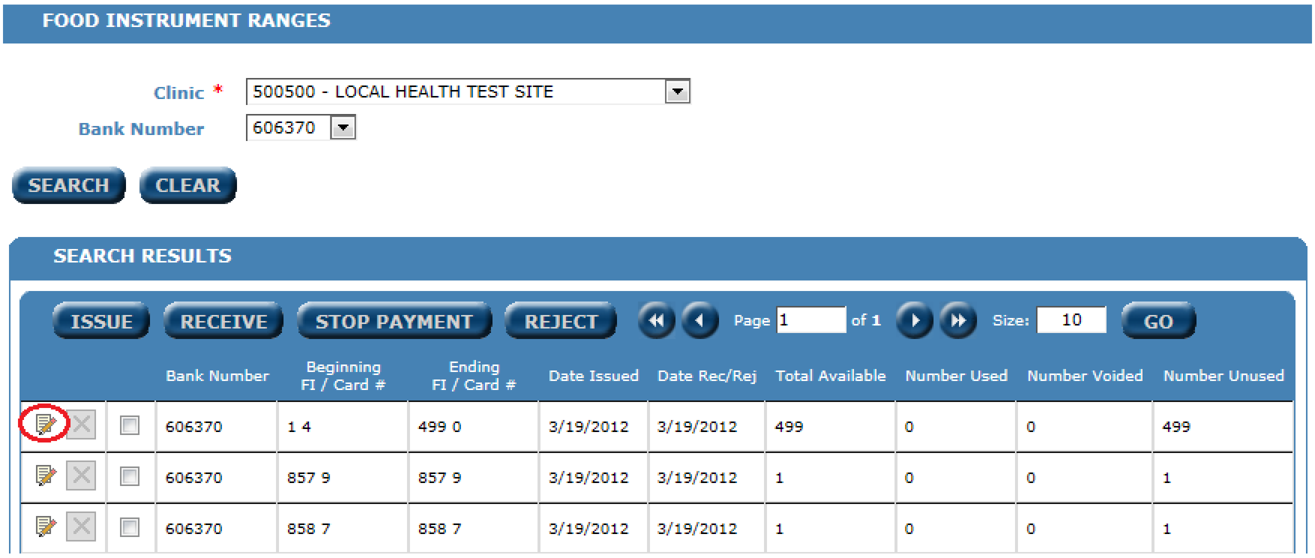


- Verify that the first and last cards in the box received from the State WIC office match the numbers in the Beginning FI/Card and Ending FI/Card # fields.

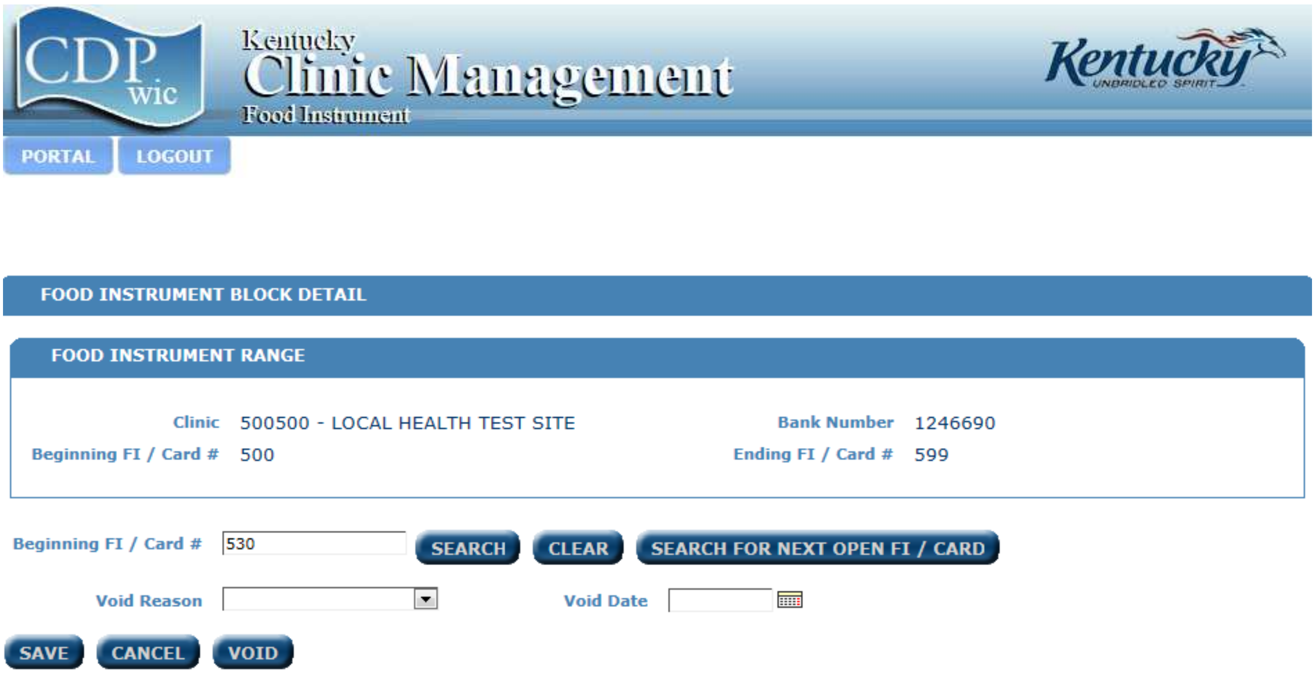
If all information is correct, click Save. The message "Cards Received" will be displayed.

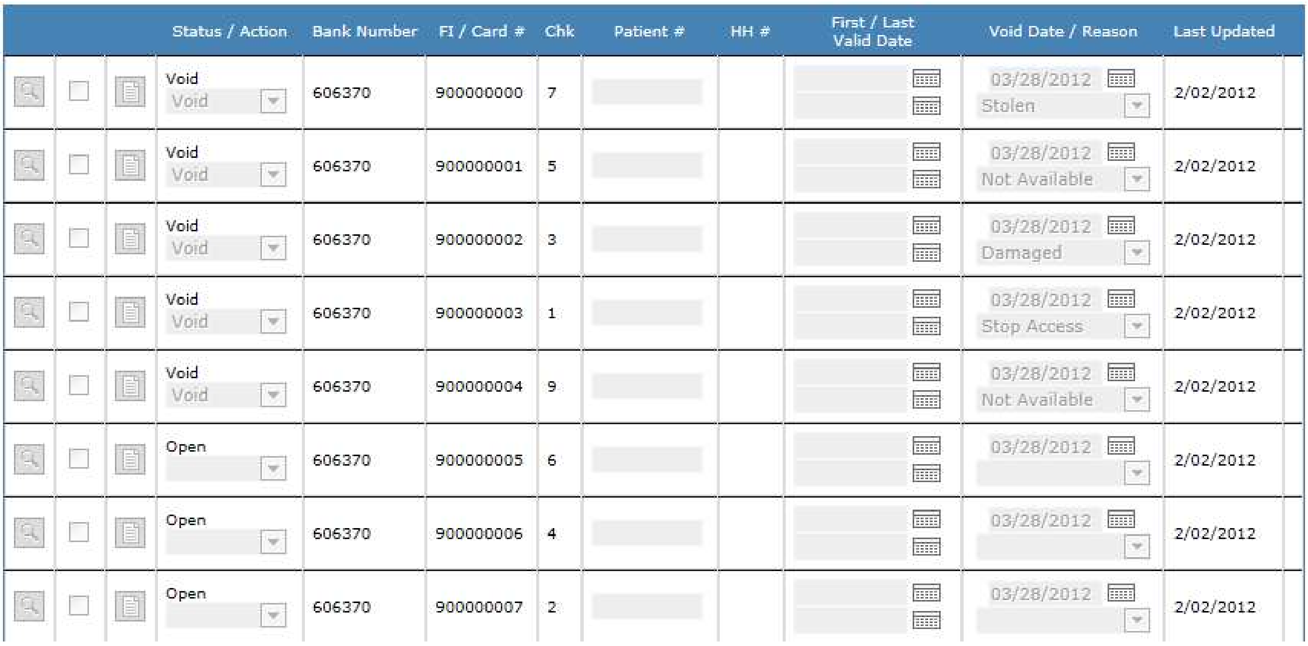
9.3.1 FOOD INSTRUMENT BLOCK DETAIL

To access the Food Instrument Block Detail screen, click the Edit icon corresponding to an FI Range on the Food Instrument Range Search screen.



The Food Instrument Block Detail screen will be displayed.





Status / Action	Bank Number	FI / Card #	Chk	Patient #	HH #	First / Last Valid Date	Void Date / Reason	Last Updated
Void Void	606370	900000000	7				03/28/2012 Stolen	2/02/2012
Void Void	606370	900000001	5				03/28/2012 Not Available	2/02/2012
Void Void	606370	900000002	3				03/28/2012 Damaged	2/02/2012
Void Void	606370	900000003	1				03/28/2012 Stop Access	2/02/2012
Void Void	606370	900000004	9				03/28/2012 Not Available	2/02/2012
Open	606370	900000005	6				03/28/2012	2/02/2012
Open	606370	900000006	4				03/28/2012	2/02/2012
Open	606370	900000007	2				03/28/2012	2/02/2012

The FI Block Detail screen shows the Status/Action, Bank Number, FI /Card #, Check Number, Patient Number, Household Number, First/Last Valid Date, Void Date/ Reason, and Last Updated Date.

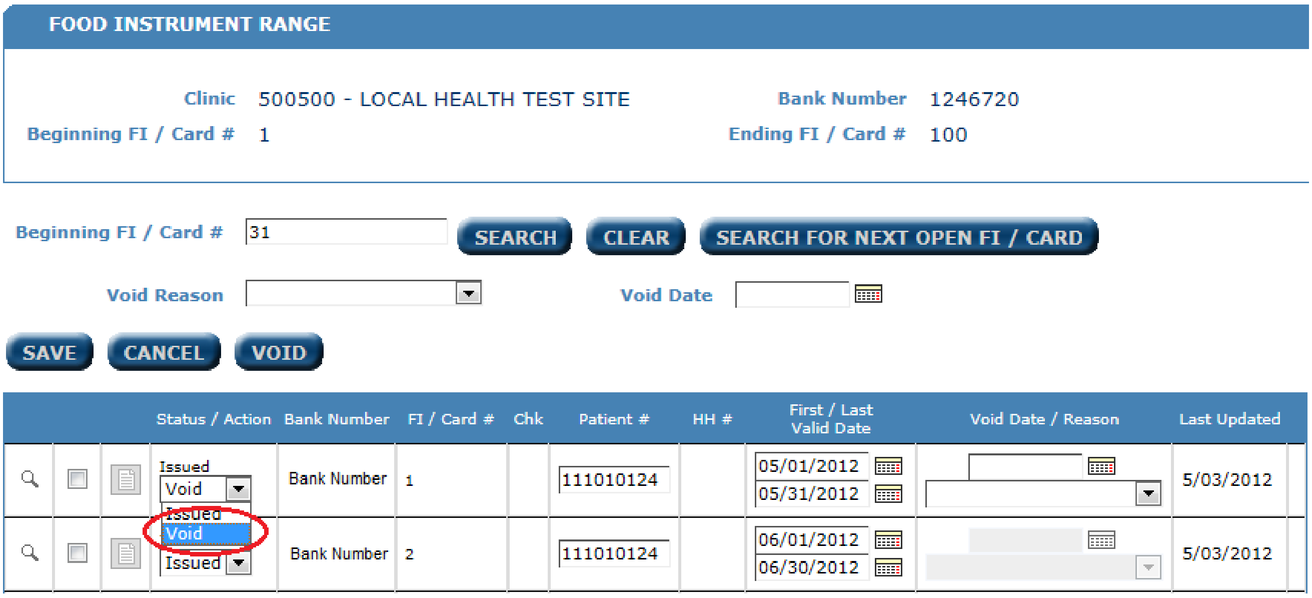
9.3.2 FARMERS MARKET NUTRITION PROGRAM

To view the Farmers Market Nutrition Program Block Detail screen, select the appropriate Bank Number from the Bank Number drop-down menu. The Bank Number for FMNP is 1246720.

- Each participant is allotted $20 for FMNP.
- A warning message will appear if an individual has exceeded their FMNP benefits.

9.3.2.1 VOIDING FOOD INSTRUMENTS

To void food instruments from the Food Instrument Block Detail screen, select “Void” from the Status/Action drop-down menu.

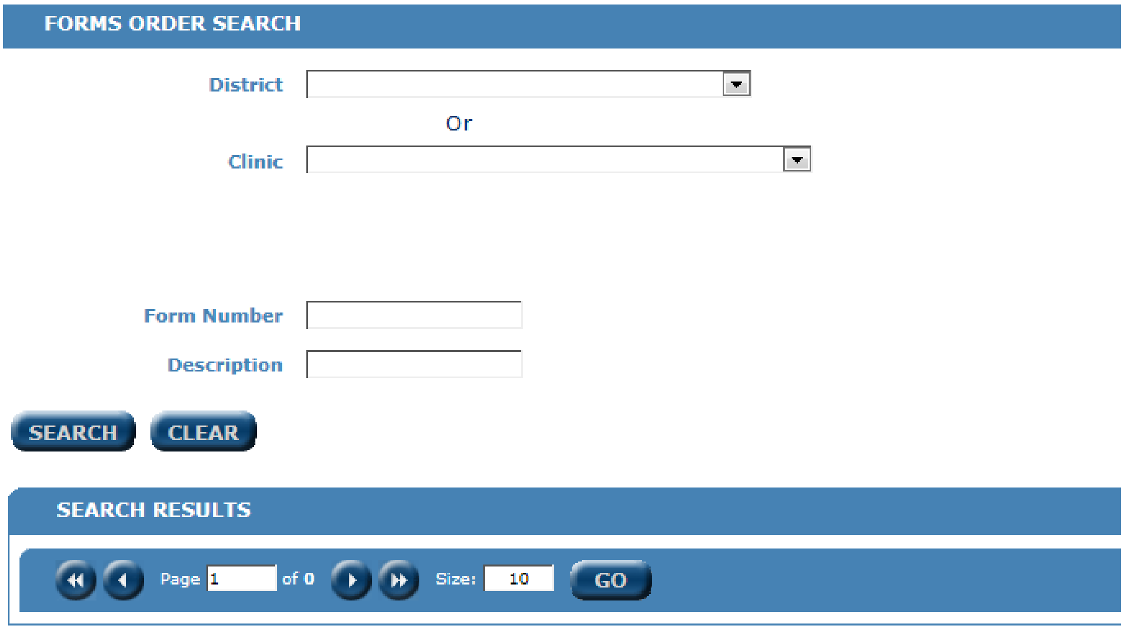


- Click the calendar icon to select the Void Date
- Left-click once on the “Reason” drop-down menu and select a Void Reason from the list
- Click the Save button

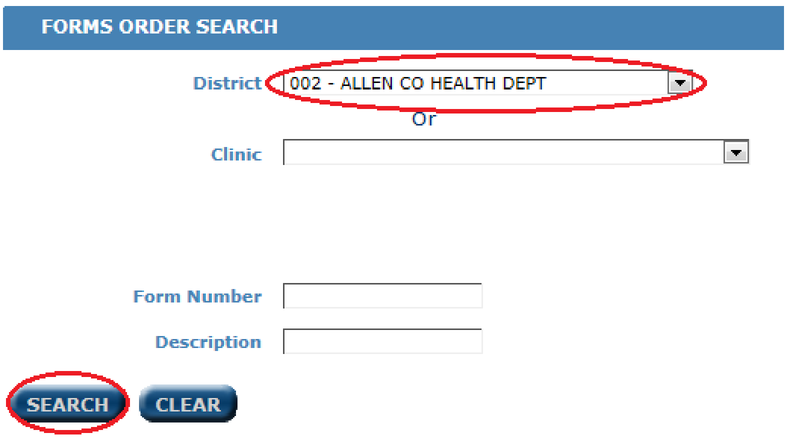
Check for the successfully saved message at the bottom portion of the screen:

10 ORDER FORMS

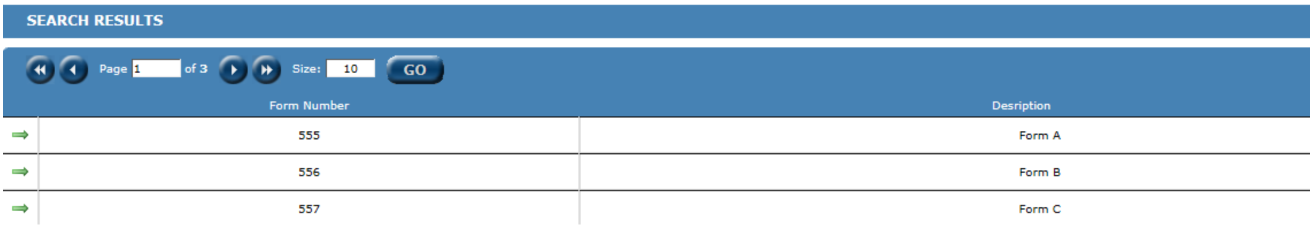
To order forms, click the Forms Order Search link on the Portal screen. The Forms Order Search screen will be displayed.



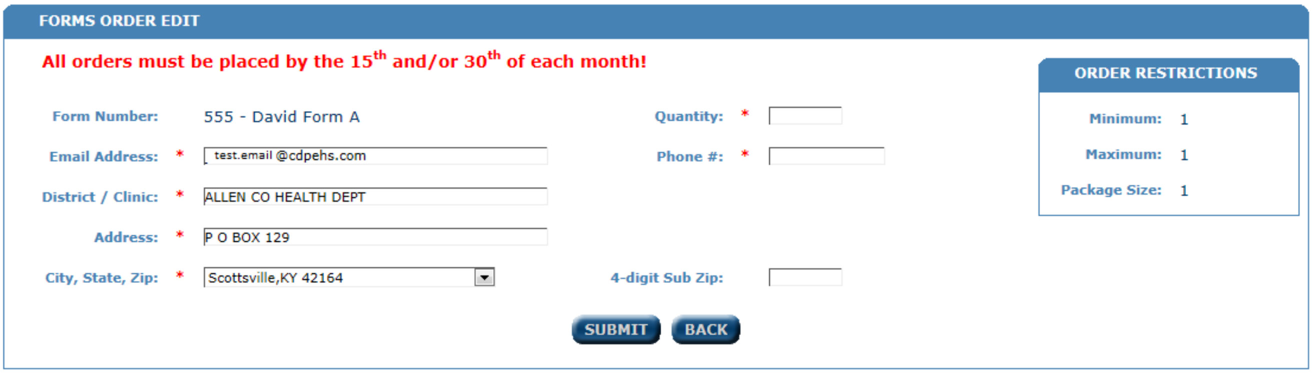
Use the drop-down menus to select a District or Clinic to search for. If the Form Number or Description is known, enter in the appropriate fields, then click search.



A list of search results will be displayed in a grid on the bottom portion of the screen.

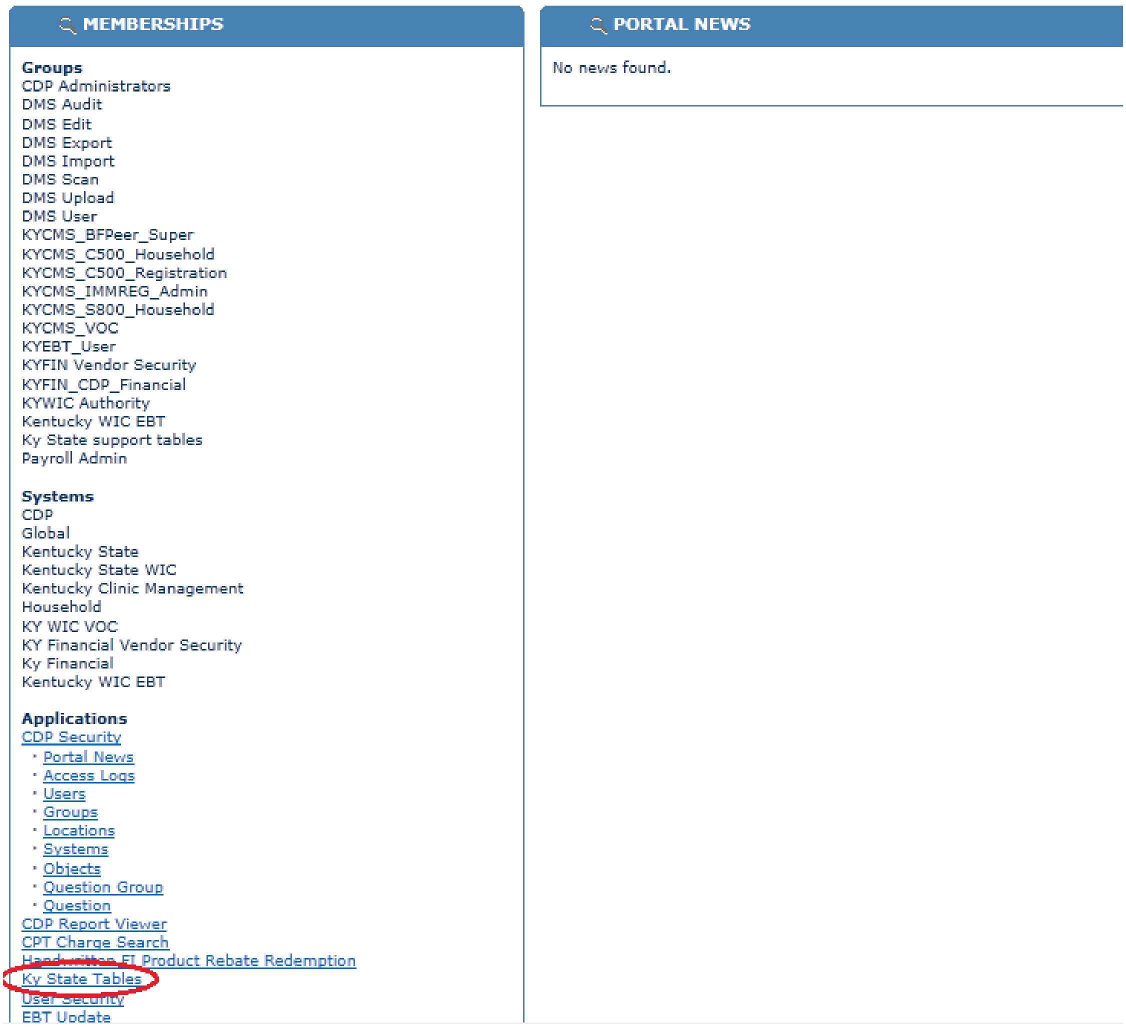


To select a form to order, click the green arrow corresponding to the Form Number. The Forms Order Edit screen will be displayed.



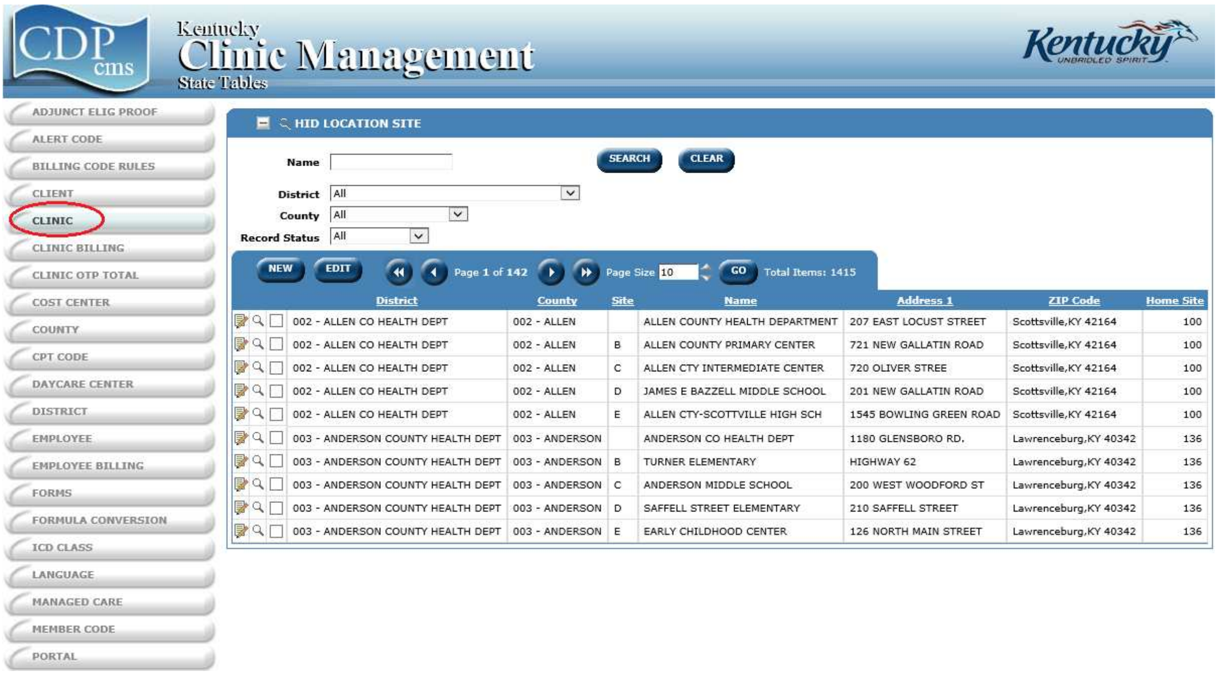
11 KY STATE TABLES

The Kentucky State Tables application is for **State use only**. Only state users will have the security membership to the KY State Tables application. To access the application, click the Ky State Tables link from the Portal screen.



The KY State Tables application is divided into many sections. Once the application has been successfully accessed, a menu of buttons will be displayed down the left side of the screen. These buttons can be used to navigate to various areas of the application.

11.1 CLINIC

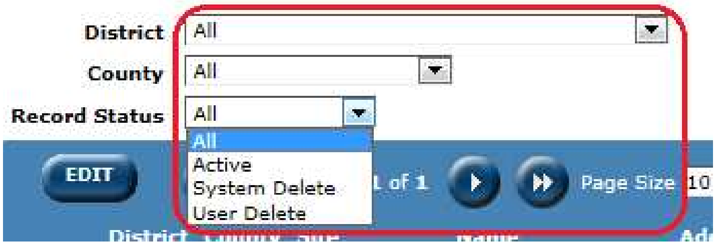


The Clinic Search screen displays a list of clinics, or sites. The top portion of the screen contains search filters for searching for a specific clinic. To search for a clinic, use any combination of the search filters. Users do not have to use every search filter, however using at least one should narrow the results.

- Enter the Clinic Name in the Name text field.

Example:

- Select the District, County, and/or Record Status from the drop-down menus.

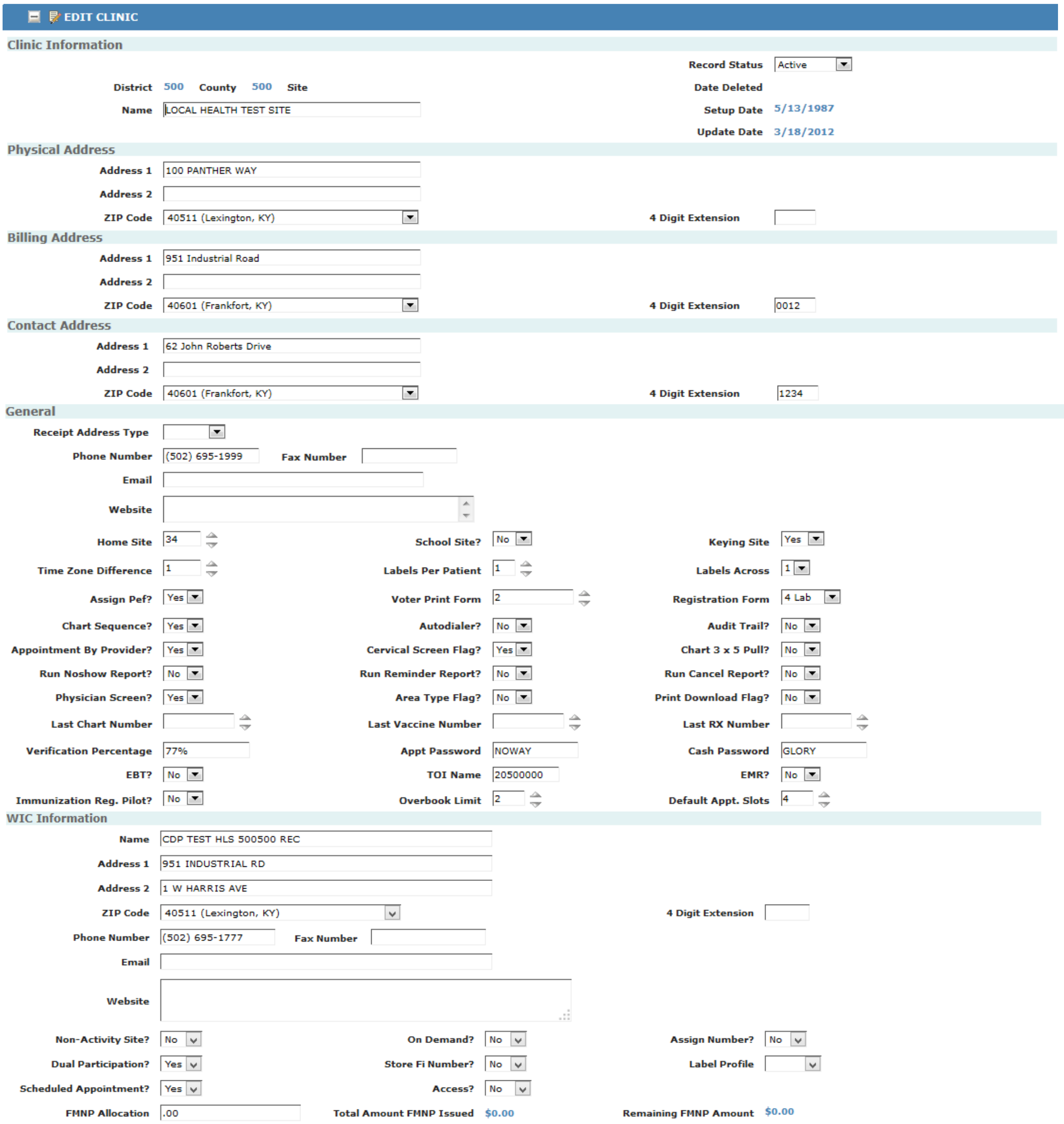
Example: 

- Click SEARCH.

The clinic(s) that match the search will be displayed in the result grid on the bottom portion of the screen.

11.1.1 EDIT CLINIC RECORD

To edit a clinic record, either check the box next to the clinic to be edited and click EDIT, or click the edit icon next to the clinic.



The Edit Clinic screen is divided into six different sections: Clinic Information, Physical Address, Billing Address, Contact Address, General, and WIC Information. All fields with text boxes can be edited by clicking in the text field and typing the correct information. Any fields with drop-down menus can be edited by left-clicking on the drop down menu and making a selection from the list. Any number fields can be edited by typing a number in the field, or using the arrows to increase or decrease the number.

- The **Clinic Information** section displays the District, County, Site, Record Status, Date Deleted, Setup Date, and Update Date. To delete a clinic record, use the drop-down menu for Record Status and select User Delete.

- The **Physical Address** section displays the Address 1, Address 2, Zip Code, and 4 Digit Extension of the Zip Code.

- The **Billing Address** section displays the Address 1, Address 2, Zip Code, and 4 Digit Extension of the Zip Code.

- The **Contact Address** section displays the Address 1, Address 2, Zip Code, and 4 Digit Extension of the Zip Code.

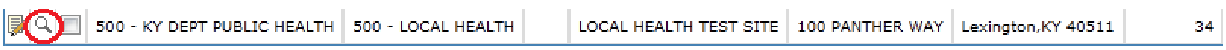
- The **General** section contains the: Receipt Address Type, Phone Number, Fax Number, Email, Website, Home Site Number, School Site, Keying Site, Time Zone Difference, Labels Per Patient, Labels Across, Assign PEF, Voter Print Form, Registration Form, Chart Sequence, Autodialer, Audit Trail, Appointment By Provider, Cervical Screen Flag, Chart 3 x 5 Pull, Run No-Show Report, Run Reminder Report, Run Cancel Report, Physician Screen, Area Type Flag, Print Download Flag, Last Chart Number, Last Vaccine Number, Last RX Number, Verification Percentage, Appt Password, Cash Password, EBT, TOI Name, EMR, Immunization Reg. Pilot, Overbook Limit, Default Appt. Slots.

- The **WIC Information** section displays the Name, Address 1, Address 2, Zip Code, 4 Digit Extension of the Zip Code, Phone Number, Fax Number, Email, Website, Non-Activity Site, On Demand, Assign Number, Dual Participation, Store FI Number, Label Profile, Scheduled Appointment, Access, FMNP Allocation, Total Amount FMNP Issued, and Remaining FMNP Amount.

11.1.2 SHOW CLINIC RECORD

The Show Clinic screen can be used to view specific clinic information. The fields displayed on the Show Clinic screen cannot be edited.

- To access the Show Clinic screen, click the show icon corresponding to the desired clinic.



SHOW CLINIC

Clinic Information

		Record Status	Active
Clinic	500 500	Delete Date	
Name	LOCAL HEALTH TEST SITE	Setup Date	5/13/1987
		Update Date	3/18/2012

Physical Address

Address 1	100 PANTHER WAY
Address 2	
ZIP Code	Lexington,KY 40511 -

Billing Address

Address1	951 Industrial Road
Address 2	
ZIP Code	Frankfort,KY 40601 - 0012

Contact Address

Address 1	62 John Roberts Drive
Address 2	
ZIP Code	Frankfort,KY 40601 - 1234

General

Receipt Address Type			
Phone Number	(502) 695-1999	Fax Number	
Email			
Website			

Home Site	34	School Site?	No	Keying Site	Yes
Time Zone Difference	1	Labels Per Patient	1	Labels Across	1
Assign Pef?	Yes	Voter Print Form	2	Registration Form	4 Lab
Chart Sequence?	Yes	Autodialer?	No	Audit Trail?	No
Appointment By Provider?	Yes	Cervical Screen Flag?	Yes	Chart 3 x 5 Pull?	No
Run Noshow Report?	No	Run Reminder Report?	No	Run Cancel Report?	No
Physician Screen?	Yes	Area Type Flag?	No	Print Download Flag?	No
Last Chart Number		Last Vaccine Number		Last RX Number	
Verification Percentage	0%	Appt Password	NOWAY	Cash Password	GLORY
EBT?	Yes	TOI Name	20500000	EMR?	None
Immunization Reg. Pilot?	No	Overbook Limit	1	Default Appt. Slots	4

WIC Information

Name	CDP TEST HLS 500500 REC		
Address 1	951 INDUSTRIAL RD		
Address 2	1 W HARRIS AVE		
ZIP Code	40511 (Lexington, KY)	4 Digit Extension	
Phone Number	(502) 695-1777	Fax Number	
Email			
Website			

Non-Activity Site?	No	On Demand?	No	Assign Number?	No
Dual Participation?	Yes	Store Fi Number?	No	Label Profile	
Scheduled Appointment?	Yes	Access?	No		
FMNP Allocation	.00	Total Amount FMNP Issued	$0.00	Remaining FMNP Amount	$0.00

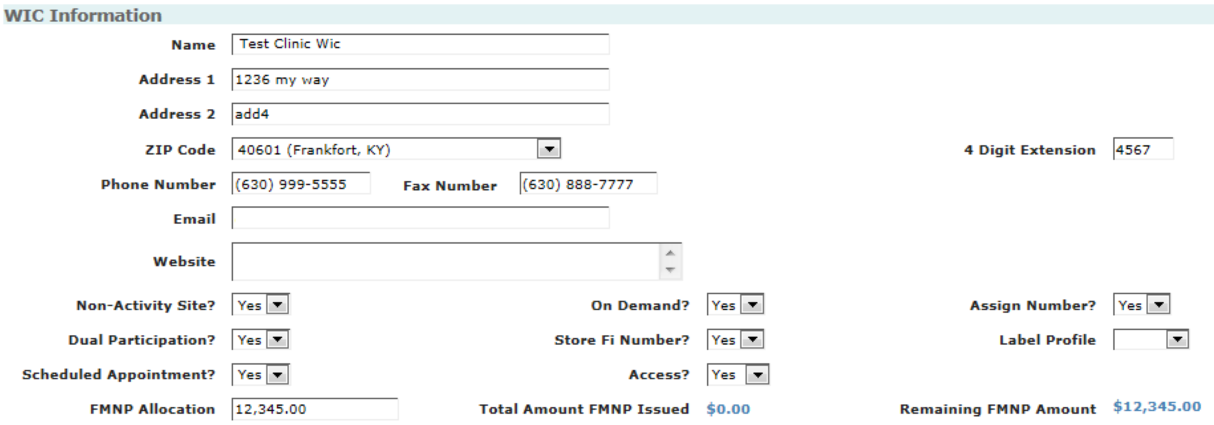
The fields displayed on the Show Clinic screen are the same fields as contained on the Add Clinic, and Edit Clinic screens. The screen is divided into six sections: Clinic Information, Physical Address, Billing Address, Contact Address, General and WIC Information.

- The **Clinic Information** section displays the District, County, Site, Record Status, Date Deleted, Setup Date, and Update Date.
- The **Physical Address** section displays the Address 1, Address 2, Zip Code, and 4 Digit Extension of the Zip Code.
- The **Billing Address** section displays the Address 1, Address 2, Zip Code, and 4 Digit Extension of the Zip Code.
- The **Contact Address** section displays the Address 1, Address 2, Zip Code, and 4 Digit Extension of the Zip Code.
- The **General** section contains the: Receipt Address Type, Phone Number, Fax Number, Email, Website, Home Site Number, School Site, Keying Site, Time Zone Difference, Labels Per Patient, Labels Across, Assign PEF, Voter Print Form, Registration Form, Chart Sequence, Autodialer, Audit Trail, Appointment By Provider, Cervical Screen Flag, Chart 3 x 5 Pull, Run No-Show Report, Run Reminder Report, Run Cancel Report, Physician Screen, Area Type Flag, Print Download Flag, Last Chart Number, Last Vaccine Number, Last RX Number, Verification Percentage, Appt Password, Cash Password, EBT, TOI Name, EMR, Immunization Reg. Pilot, Overbook Limit, Default Appt. Slots.
- The **WIC Information** section displays the Address 1, Address 2, Zip Code, 4 Digit Extension of the Zip Code, Phone Number, Fax Number, Email, Website, Non-Activity Site, On Demand, Assign Number, Dual Participation, Store FI Number, Label Profile, Scheduled Appointment, Access, FMNP Allocation, Total Amount FMNP Issued, and Remaining FMNP Amount.

11.1.2.1.1 FMNP

For clinics that offer the Farmers Market Nutrition Program (FMNP), the state can set the FMNP Allocation field for the currency amount that clinic has been allotted to issue. The Clinic screen also displays a read-only field showing the currency amount of FMNP benefits that have been issued. To edit the FMNP Allocation, or view the Total Amount FMNP Issued and Remaining, click the Edit Icon next to a District.

In the WIC Information section, at the bottom portion of the screen, the FMNP information is displayed.



Individuals are only allowed one issuance of FMNP benefits per year. The Season for FMNP starts June 1 and ends October 31.

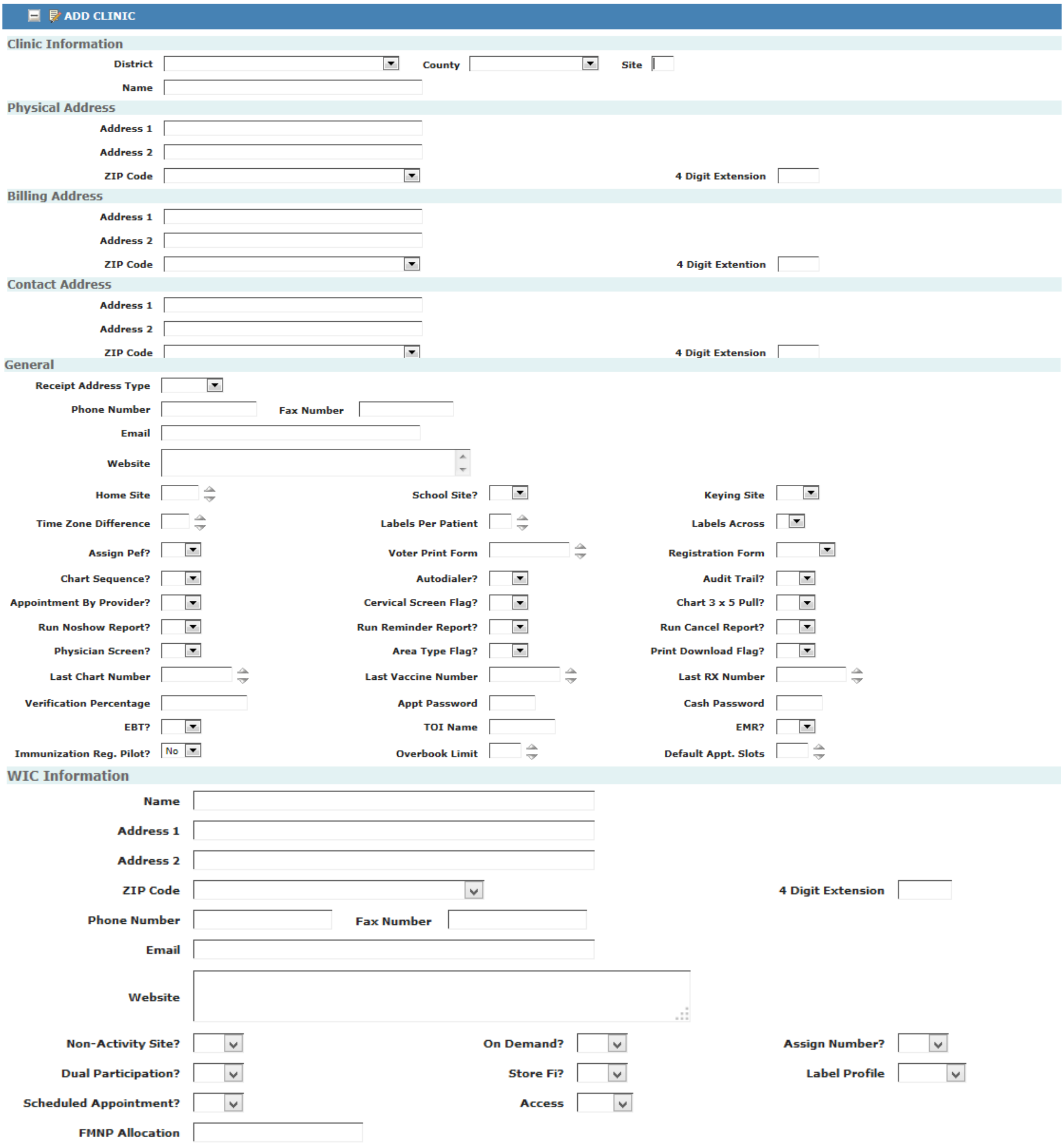
11.1.3 ADD CLINIC

The Add Clinic screen is used to enter information about a specific clinic that is not currently in the system.

To add a clinic, click the 

button.


HID LOCATION SITE
Name
local health
SEARCH
CLEAR
District
All
County
All
Record Status
All
NEW
EDIT
Page 1 of 1
Page Size 10
GO
Total Items: 1
District
County
Site
Name
Address 1
ZIP Code
Home Site
500 - KY DEPT PUBLIC HEALTH
500 - LOCAL HEALTH
LOCAL HEALTH TEST SITE
100 PANTHER WAY
Lexington,KY 40511
34


ADD CLINIC

Clinic Information

District | County | Site

Name

Physical Address

Address 1

Address 2

ZIP Code | 4 Digit Extension

Billing Address

Address 1

Address 2

ZIP Code | 4 Digit Extention

Contact Address

Address 1

Address 2

ZIP Code | 4 Digit Extension

General

Receipt Address Type

Phone Number | Fax Number

Email

Website

Home Site | School Site? | Keying Site

Time Zone Difference | Labels Per Patient | Labels Across

Assign Pef? | Voter Print Form | Registration Form

Chart Sequence? | Autodialer? | Audit Trail?

Appointment By Provider? | Cervical Screen Flag? | Chart 3 x 5 Pull?

Run Noshow Report? | Run Reminder Report? | Run Cancel Report?

Physician Screen? | Area Type Flag? | Print Download Flag?

Last Chart Number | Last Vaccine Number | Last RX Number

Verification Percentage | Appt Password | Cash Password

EBT? | TOI Name | EMR?

Immunization Reg. Pilot? No | Overbook Limit | Default Appt. Slots

WIC Information

Name

Address 1

Address 2

ZIP Code | 4 Digit Extension

Phone Number | Fax Number

Email

Website

Non-Activity Site? | On Demand? | Assign Number?

Dual Participation? | Store Fi? | Label Profile

Scheduled Appointment? | Access

FMNP Allocation

The fields used to enter information on the Add Clinic screen are the same fields as contained on the Show Clinic and Edit Clinic screens. The screen is divided into six sections: Clinic Information, Physical Address, Billing Address, Contact Address, General and WIC Information.

- The **Clinic Information** section contains the District, County, Site, and Name.
- The **Physical Address** section contains the Address 1, Address 2, Zip Code, and 4 Digit Extension of the Zip Code.
- The **Billing Address** section contains the Address 1, Address 2, Zip Code, and 4 Digit Extension of the Zip Code.
- The **Contact Address** section contains the Address 1, Address 2, Zip Code, and 4 Digit Extension of the Zip Code.
- The **General** section contains the: Receipt Address Type, Phone Number, Fax Number, Email, Website, Home Site Number, School Site, Keying Site, Time Zone Difference, Labels Per Patient, Labels Across, Assign PEF, Voter Print Form, Registration Form, Chart Sequence, Autodialer, Audit Trail, Appointment By Provider, Cervical Screen Flag, Chart 3 x 5 Pull, Run No-Show Report, Run Reminder Report, Run Cancel Report, Physician Screen, Area Type Flag, Print Download Flag, Last Chart Number, Last Vaccine Number, Last RX Number, Verification Percentage, Appt Password, Cash Password, EBT, TOI Name, EMR, Immunization Reg. Pilot, Overbook Limit, Default Appt. Slots.
- The **WIC Information** section contains the Address 1, Address 2, Zip Code, 4 Digit Extension of the Zip Code, Phone Number, Fax Number, Email, Website, Non-Activity Site, On Demand, Assign Number, Dual Participation, Store FI Number, Label Profile, Scheduled Appointment, Access, FMNP Allocation, Total Amount FMNP Issued, and Remaining FMNP Amount.

11.2 CLIENT

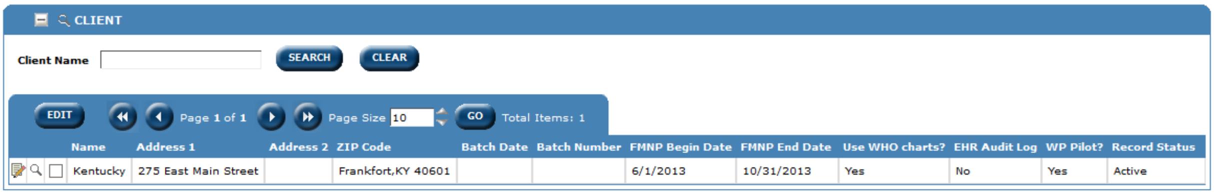
To access the Client application within State Tables, click the 

button in the State Tables menu.

The Client application is used to manage settings for the state.

11.2.1 CLIENT SEARCH

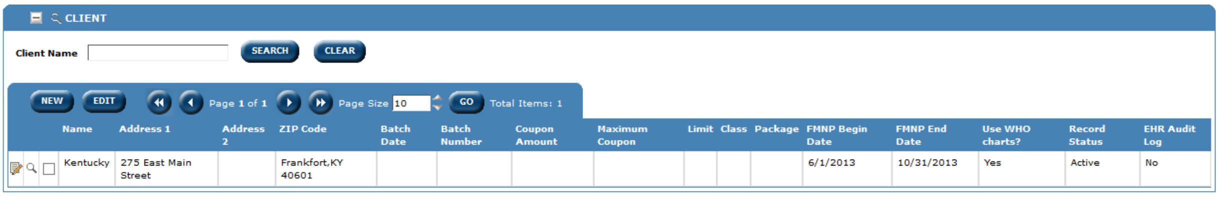
The Client Search screen is used to search for clients in the CMS KY State Tables application.



To search for a client, type the Client Name in the search field and click 

.

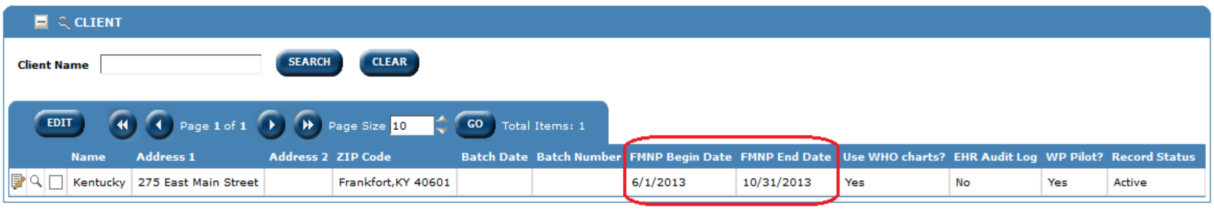
The search results will be displayed in the grid at the bottom portion of the screen. The fields shown in the search results are Name, Address1, Address 2, ZIP Code, Batch Date, Batch Number, FMNP Begin Date, FMNP End Date, Use WHO Charts?, EHR Audit Log, WP (web printing) Pilot?, and Record Status.



11.2.2 FMNP

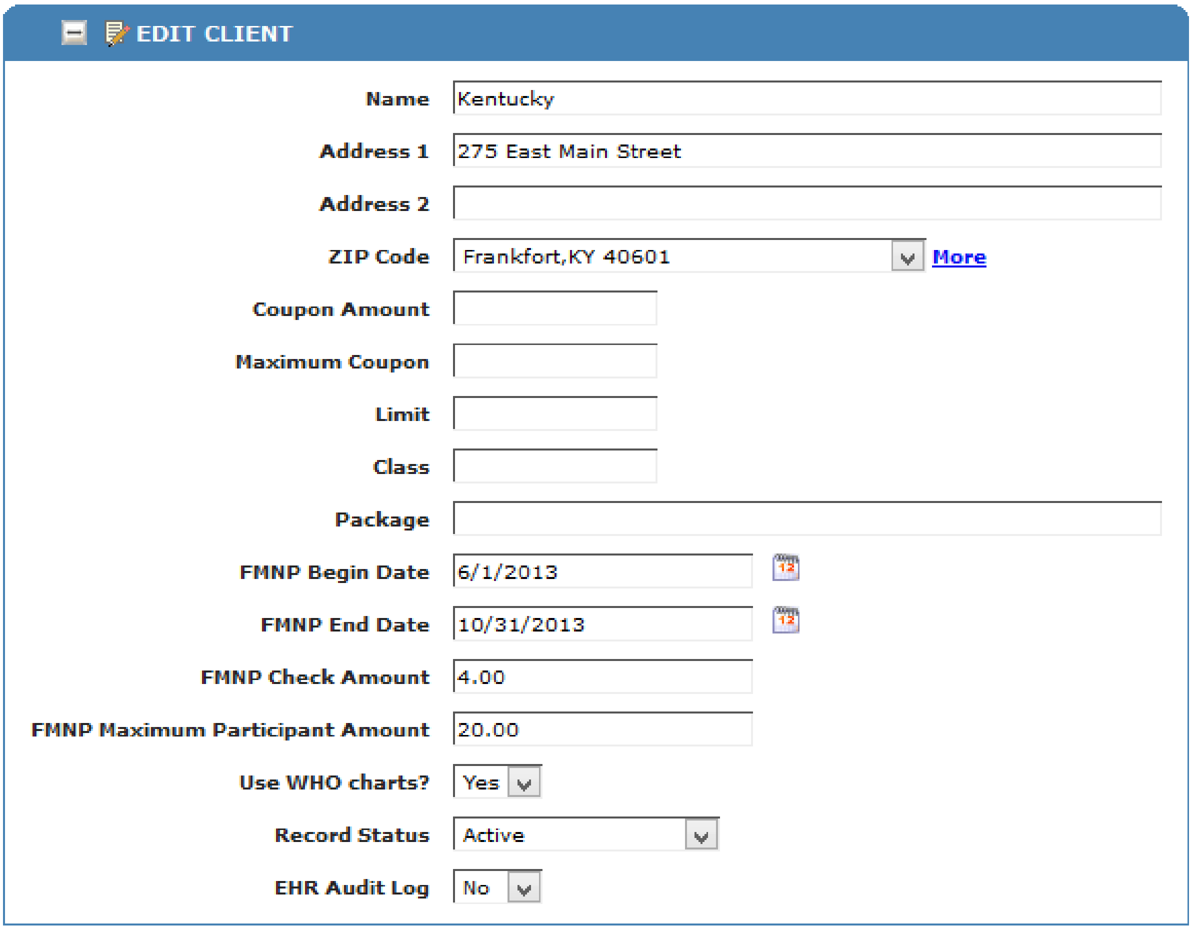
The Client screen has an FMNP Begin and End Date. FMNP begins June 1 and ends October 31. The FMNP/Check Amount will be shown, as well as the FMNP Maximum Participant Amount.

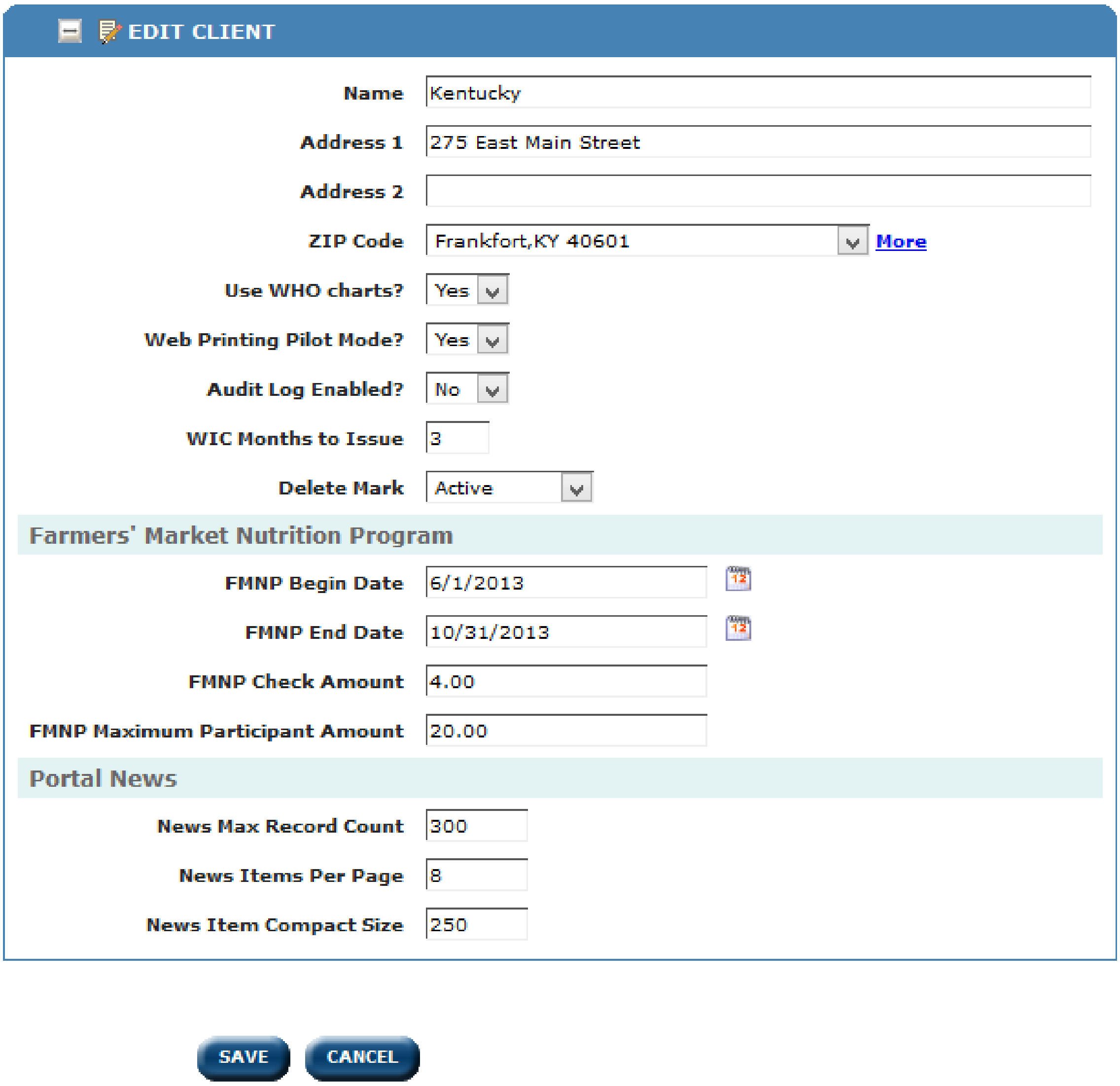
If a clinic exceeds the maximum participant amount during issuance, a warning message will appear.



11.2.3 EDIT CLIENT

The Edit Client screen is used to edit information about a specific client.





The general fields on the Edit Client screen include: Name, Address, ZIP Code, Use WHO Charts (Y/N), Web Printing Pilot Mode (Y/N), Audit Log Enabled (Y/N), WIC Months to Issue (manually enter 1-3), and Delete Mark.

The Farmers' Market Nutrition Program (FMNP) fields include: FMNP Begin Date, FMNP End Date, FMNP Check Amount, and FMNP Maximum Participant Amount.

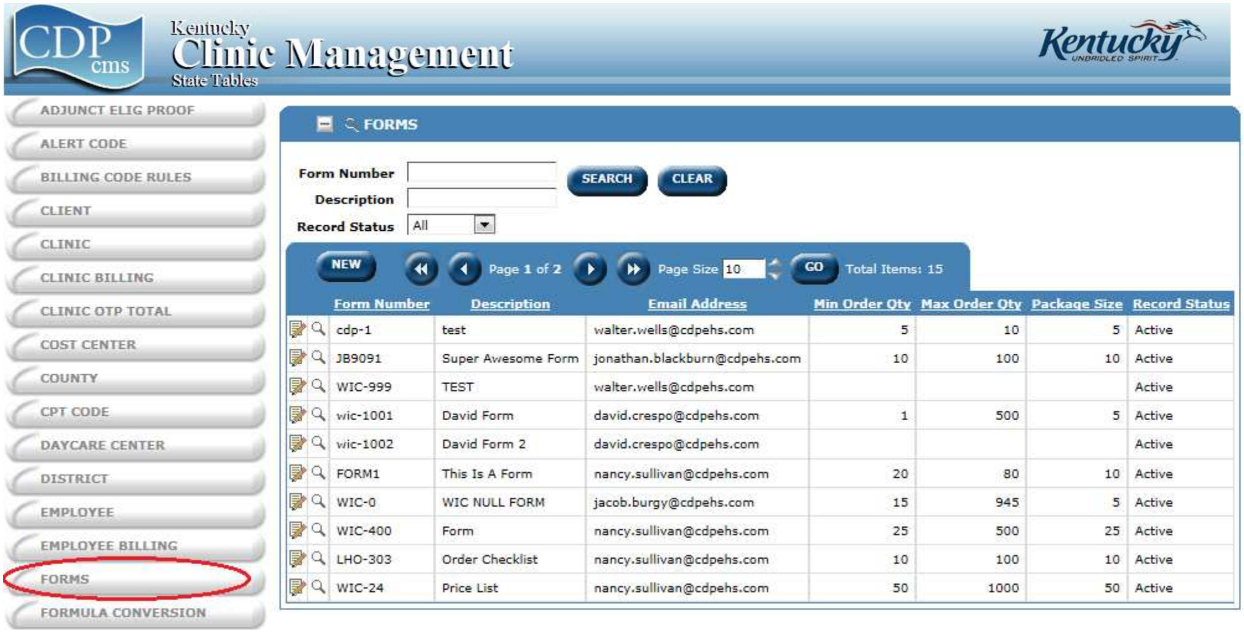
The Portal News fields include: News Max Record Count, News Items Per Page, and News Item Compact Size.

- To change any of the fields on the Edit Client screen: type in the text fields, use the calendar icons, or select from the drop-down menus, then click Save. To cancel without saving changes, click Cancel.

11.3 FORMS

The Forms section of State Tables allows state users only to access the forms available to order.

To access the Forms section of State Tables, click the Ky State Tables link from the Portal screen, then click the FORMS button on the left side of the screen.



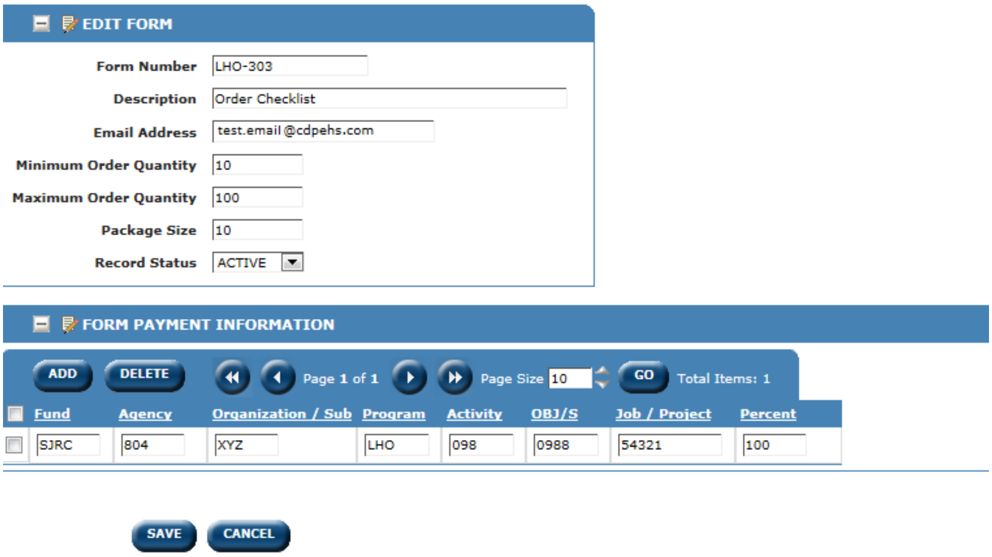
Form Number	Description	Email Address	Min Order Qty	Max Order Qty	Package Size	Record Status
cdp-1	test	walter.wells@cdpehs.com	5	10	5	Active
JB9091	Super Awesome Form	jonathan.blackburn@cdpehs.com	10	100	10	Active
WIC-999	TEST	walter.wells@cdpehs.com				Active
wic-1001	David Form	david.crespo@cdpehs.com	1	500	5	Active
wic-1002	David Form 2	david.crespo@cdpehs.com				Active
FORM1	This Is A Form	nancy.sullivan@cdpehs.com	20	80	10	Active
WIC-0	WIC NULL FORM	jacob.burgy@cdpehs.com	15	945	5	Active
WIC-400	Form	nancy.sullivan@cdpehs.com	25	500	25	Active
LHO-303	Order Checklist	nancy.sullivan@cdpehs.com	10	100	10	Active
WIC-24	Price List	nancy.sullivan@cdpehs.com	50	1000	50	Active

The Form Number Search screen will be displayed.

The search screen allows users to search for forms by number, description, or record status. The fields on the search screen are read-only. To edit any of the information in these fields, click the Edit icon next to a form. The Edit Form screen will be displayed.

11.3.1 EDIT FORMS

The Edit Forms screen is used to edit information about orderable forms.



The fields that can be edited include: Form Number, Description, Email Address, Minimum Order Quantity, Maximum Order Quantity, Package Size, and Record Status.

The bottom portion of the screen is for editing, adding, or deleting Form Payment Information. Fields that can be edited in this panel include: Fund, Agency, Organization/Sub, Program, Activity, OBJ/S, Job/Project, and Percent.

- To add form payment information, click the ADD button and fill in the blank fields.
- To delete form payment information, check the box next to a Fund, and click the DELETE button.

11.4 EMPLOYEE

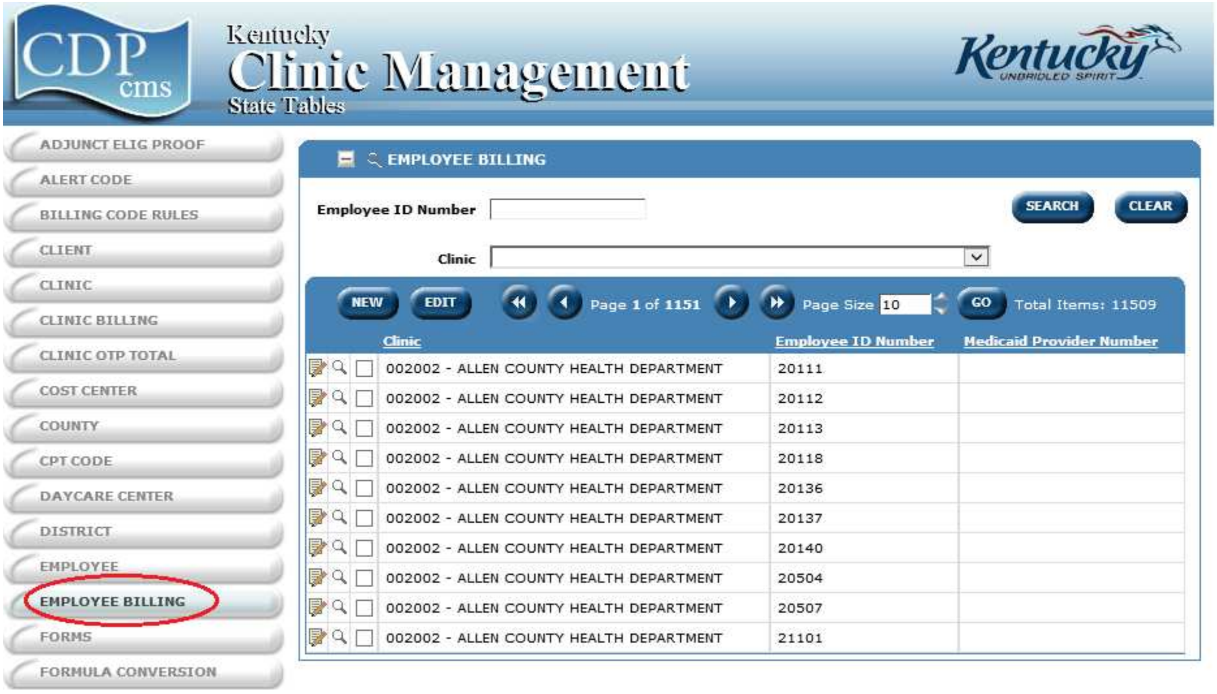
11.4.1 EMPLOYEE SEARCH

The Employee Search screen is used to search for clinic employees in the system. To access the Employee Search screen from the KY State Tables application, click the Employee button in the menu along the left side of the screen.

Employees can be searched by: District, First Name, Last Name, Employee Number, and/or Record Status. Enter any known search criteria and click the Search button. A list of all results matching the search criteria will be displayed.

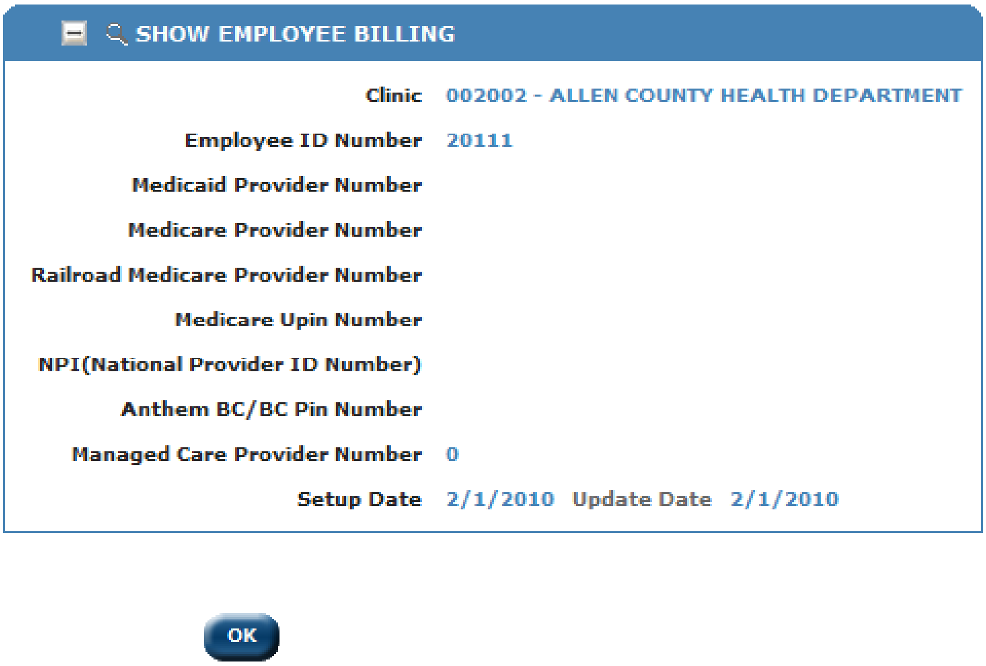
11.5 EMPLOYEE BILLING

11.5.1 EMPLOYEE BILLING SEARCH



- Enter an Employee ID number and Clinic and click search.

A list of search results may be displayed if employees in the system match the search criteria. To view an employee, click the view icon (magnifying glass) corresponding to an employee. The Show Employee Billing screen will be displayed.



The Show Employee Billing screen displays the following information: Clinic, Employee ID Number, Medicaid Provider Number, Medicare Provider Number, Railroad Medicare Provider Number, Medicare Upin Number, NPI (National Provider ID Number), Anthem Blue Cross /Blue Cross PIN Number, Managed Care Provider Number, and Setup Date.

11.5.1.1 EDIT EMPLOYEE BILLING

To edit employee billing from the Employee Billing Search screen, click the edit icon next to an employee ID. The Edit Employee Billing screen will be displayed.

Edit any of the fields on the Edit Employee Billing screen, then click Save. To cancel without saving changes, click Cancel.

12 HELP

12.1 CONTACTS

12.1.1 PROGRAM CONTACTS

KY WIC Help Desk (877) 597-0367

Business Hours: 8 am to 5:30 pm

12.1.2 APPLICATION ASSISTANCE

KY WIC Help Desk (877) 597-0367

Business Hours: 8 am to 5:30 pm

Or

Local Health Operations Help Desk (502) 564-6663

12.1.2.1 PASSWORD ASSISTANCE

If you have forgotten or would like to change your password, refer to *Forgot My Password*.

12.1.3 GENERAL HARDWARE AND SOFTWARE ASSISTANCE

Contact your IT Support provider for assistance with hardware or software.

Appendix A

WIC PROCEDURES

~~0.1~~ 1.1 WIC BENEFITS

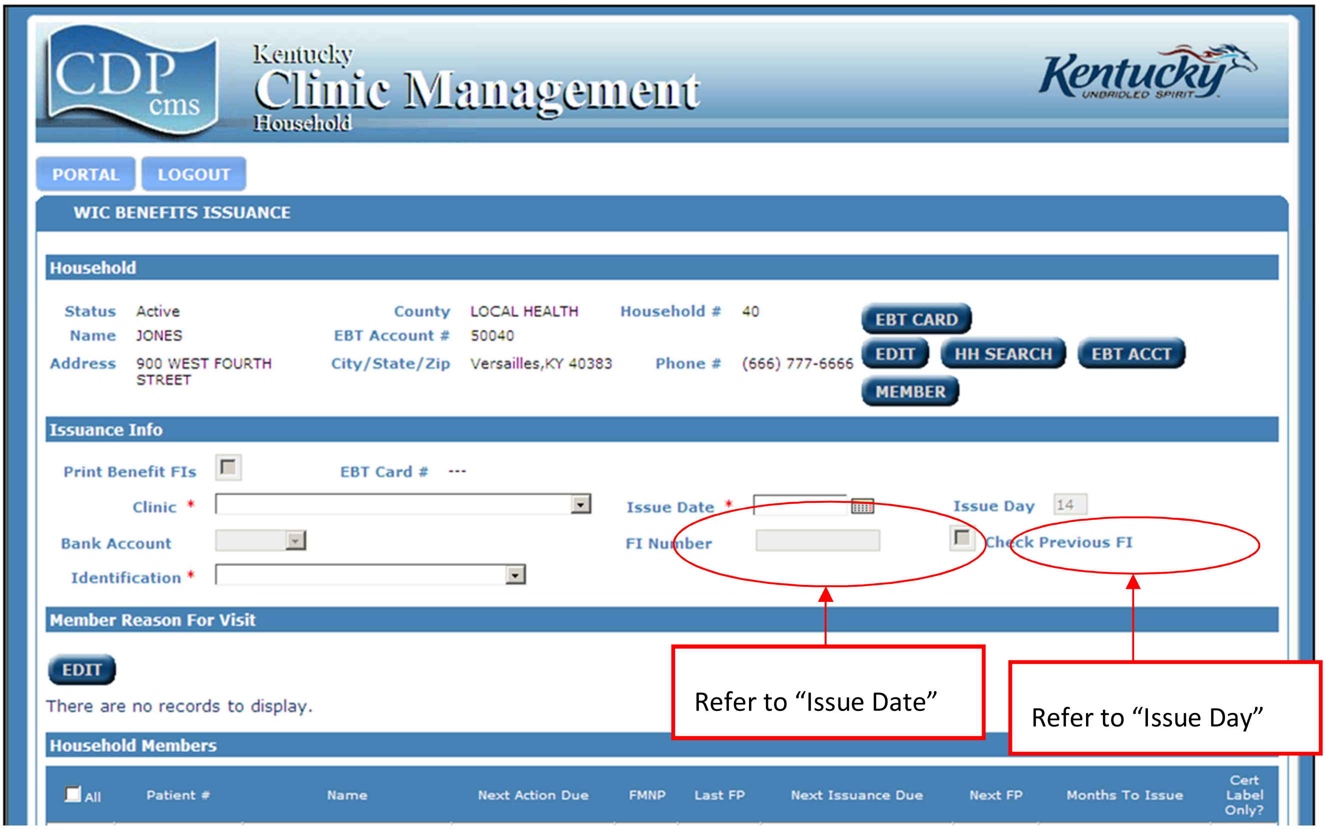
ISSUANCE

The table below is an Issue Date Reference. For each given situation, there is a suggestion for the Issue Date to use and an explanation of the Issue Day used.

"Issue Date" Reference		
Situation	*Issue Date	Issue Day
Issuance to a new Household (New to WIC, never issued benefits)	• Same day the participant is certified.	• The system will automatically complete the issue day using information entered in the "Issue Date" field
Issuance to an existing Household	• If issuance takes place **before** benefits begin or on the actual date benefits begin, use the date that benefits are to begin. (Example: Participant comes to clinic on 2/13/12 and next issuance date is 2/16/12, enter 2/16/12 date in the "issue date" field)	• Already established based on prior issuance
Issuance to a participant after "next issuance due" date	• Enter the actual date the participant is issued benefits. (Example: Participant comes to clinic on 2/17/12 and the "next issuance" was due 2/14/12. Enter 2/17/12 in the "issue date" field. Note: In order to issue an appropriate quantity of food, the system will automatically adjust the amount of benefits issued.	• Already established based on prior issuance
Issuance to coordinate benefits with an existing HH member receiving benefits	• Enter the actual date the participant is issued benefits. • The system will issue an appropriate quantity of food benefits and coordinate the new member to the household's established issue date. (Example: Mom's issue date is 4/10/12; baby is added 4/20/12. Enter 4/20/12 in the "issue date" field.)	• Already established based on HH member established prior to issuance

Issuance when **ALL** members transferring to a new site	• Determine the last time benefits were issued. • If issuance is due, and participant is in clinic **before** "next issuance", enter the date benefits are to begin in the "issue date" field. (Example: Participant comes to clinic on 2/13/12 and next issuance date is 2/16/12, enter 2/16/12 date in the "issue date" field) • If the participant presents "after" the next benefit issuance is due, enter the actual date in the "issue date" field. (Example: Participant comes to clinic on 2/17/12 and the "next issuance" was due 2/14/12. Enter 2/17/12 in the "issue date" field.	• Issue Day already established (issue day is transferred along with the members transferred via VOC Search)
Issuance when a member is transferring to an existing HH at another site	• If the member does not have benefits and is due benefits before the established issue day, enter the current date as issue date. (Example: Member transfers on 4/15/12 without any benefits to a HH with issue day of 20. Enter 4/15/12 as the issuance date. A prorated package will be issued for 4/15 to 4/19) • If the member has benefits, determine when next benefits are due and enter "next issuance" date in the "issue date" field. (Example: Member transfers on 4/15/12 and "next issuance" due is 4/27/12. Enter 4/27/12 in the "issue date" field.	• Issue Day already established (Example: The transferring member's issue day was 10 and transfers into a HH with an issue day of 20. The transferring member's issue day becomes 20) Rev. 5/2012

*******Note: Once the issue day has been established for a household, the issue day cannot be changed.***


CDP cms
Kentucky
Clinic Management
Household
Kentucky UNBRIDLED SPIRIT
PORTAL
LOGOUT
WIC BENEFITS ISSUANCE
Household
Status Active
Name JONES
Address 900 WEST FOURTH STREET
County LOCAL HEALTH
EBT Account # 50040
City/State/Zip Versailles,KY 40383
Household # 40
Phone # (666) 777-6666
EBT CARD
EDIT
HH SEARCH
EBT ACCT
MEMBER
Issuance Info
Print Benefit FIs
EBT Card # ---
Clinic *
Issue Date *
Issue Day 14
Bank Account
FI Number
Check Previous FI
Identification *
Member Reason For Visit
EDIT
There are no records to display.
Household Members
All
Patient #
Name
Next Action Due
FMNP
Last FP
Next Issuance Due
Next FP
Months To Issue
Cert Label Only?
Refer to "Issue Date"
Refer to "Issue Day"

REPLACEMENT

2/29/2012

HEALTH PROFESSIONAL REPLACING AND RETURNING eWIC BENEFITS

STEPS FOR HEALTH PROFESSIONAL DOING ISSUANCE

REPLACING BENEFITS WHEN FORMULA IS NOT RETURNED

1. Search for the patient.
2. Click Patient Menu icon for the patient.
3. On Patient Menu, click Replace Benefits.
4. On Replace Benefits:
    a. In Void Benefits, check months to void.
    b. In Void Reason, select reason from drop-down.
    c. In Food Package, select new food package.
    d. In Issuance Info, verify/select Clinic and select Identification.
    e. Click Replace Benefits.
    f. Windows appear with issuance label and benefits list; print each and close each window.

REPLACING BENEFITS WHEN FORMULA IS RETURNED

1. Enter number of cans of formula returned:
    a. Search for the patient.
    b. Click Patient Menu icon for the patient.
    c. On Patient Menu, click Return Purchased Formula.
    d. On Return Formula:
        i. In Quantity Returned, enter number of cans returned.
        ii. Click Return Benefits.
        iii. Message displays that benefits were successfully returned.
        iv. Click Back.
2. Void benefits, change food package and replace benefits:
    a. On Patient Menu, click Replace Benefits.
    b. On Replace Benefits:
        i. In Void Benefits, check months to void.
        ii. In Void Reason, select reason from drop-down.
        iii. In Food Package, select new food package.
        iv. In Issuance Info, verify/select Clinic and select Identification.
        v. Click Replace Benefits.
        vi. Windows appear with issuance label and benefits list; print each and close each window.

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REPLACING AND RETURNING eWIC BENEFITS

STEPS FOR SUPPORT STAFF

REPLACING BENEFITS WHEN FORMULA IS NOT RETURNED

1. Refer food package change to health professional to assign a new food package.
    a. If benefits to be replaced are for months where an ICT was done, the ICT changed infant status to child status. If the food package change is for the infant food package, the child status assigned in the ICT must be changed to the appropriate infant status before a new infant food package can be assigned.
2. After food package is changed, void and replace benefits:
    a. Search for the patient's household.
    b. On Member screen, select patient and click Patient Menu.
    c. On Patient Menu, click Replace Benefits.
    d. On Replace Benefits:
        i. In Void Benefits, check months to void.
            1. If replacing benefits for a month(s) for an infant with a current ICT:
                a. If replacing the infant food package(s), check months for all infant and child packages to void. The system will replace the infant package(s) and do the ICT again to replace the child package(s) if appropriate. This ensures the appropriate child food package is issued.
                b. If replacing the child food package(s), check only the month(s) for the child package.
        ii. In Void Reason, select reason from drop-down.
        iii. In Food Package, assigned food package shows.
        iv. In Issuance Info, verify/select Clinic and select Identification.
        v. Click Replace Benefits.
        vi. Windows appear with issuance label and benefit list; print each and close each window.

REPLACING BENEFITS WHEN FORMULA IS RETURNED

1. Enter quantity of formula returned:
    a. Search for the patient's household.
    b. On Member screen, select patient and click Patient Menu.
    c. On Patient Menu, click Return Purchased Formula.

   d. On Return Formula:
      i. In Quantity Returned, enter quantity of purchased formula returned.
      ii. Click Return Benefits.
      iii. Message returns that benefits were successfully returned.
      iv. Click Back or Portal.
2. Refer food package change to health professional to assign a new food package.
   a. If benefits to be replaced are for months where an ICT was done, the ICT changed infant status to child status. If the food package change is for the infant food package, the child status assigned in the ICT must be changed to the appropriate infant status before a new infant food package can be assigned.
3. After food package is changed, void and replace benefits:
   a. Search for the patient's household.
   b. On Member screen, select patient and click Patient Menu.
   c. On Patient Menu, click Replace Benefits.
   d. On Replace Benefits:
      i. In Void Benefits, check months to void.
         1. If replacing benefits for a month(s) for an infant with a current ICT:
            a. If replacing the infant food package(s), check months for all infant and child packages to void. The system will replace the infant package(s) and do the ICT again to replace the child package(s) if appropriate. This ensures the appropriate child food package is issued.
            b. If replacing the child food package(s), check only the month(s) for the child package.
      ii. In Void Reason, select reason from drop-down.
      iii. In Food Package, assigned food package shows.
      iv. In Issuance Info, verify/select Clinic and select Identification.
      v. Click Replace Benefits.
      vi. Windows appear with issuance label and benefit list; print each and close each window.

~~0.2~~ 1.2 WIC CERTIFICATION

MEASURES AND WIC CERTIFICATION

A. Measures and Certification steps when health professional enters all data:

1. From Portal – click Patient Search
2. Enter patient ID number and click Search button
3. Click Patient Menu icon for selected patient
4. From Patient Menu – click Measures & Blood Work History link
5. From Measures & Blood Work History, click New Measures/Blood Work button
6. Enter measures and blood work (if age appropriate)
7. To print growth chart, click Save button (saves data & returns to Measures & Blood Work History screen)
8. Click Growth Chart button
9. Click a print button to print growth charts, then close print window (click X)
10. Click New Cert/Recert button
11. On Cert/Recert Status Selection screen, select status and click Calculate Risk button
12. Complete Risk, Comments, Plan (and Breastfeeding/TV questions if age appropriate) and click Save & Food Pkg Assign button
13. Select food package and click Save & WIC 75 button

B. Measures steps when Clinical Assistant enters measures and blood work:

1. From Portal – click Patient Search
2. Enter patient ID number and click Search button
3. Click Patient Menu icon for selected patient
4. From Patient Menu – click Measures & Blood Work History
5. From Measures & Blood Work History, click New Measures/Blood Work button
6. Enter measures and blood work (if age appropriate)

7. To print growth chart, click Save button (saves data & returns to Measures & Blood Work History screen)

8. Click Growth Chart button

9. Click a print button to print growth charts, then close print window (click X)

10. Click Portal button for next patient search

C. Certification steps when health professional enters only certification data:

1. From Portal – click Patient Search

2. Enter patient ID number and click Search button

3. Click Patient Menu icon for selected patient

4. From Patient Menu, click History under WIC

5. From History screen, click New Cert/Recert button

6. On Cert/Recert Status Selection screen, select status and click Calculate Risk button

7. Complete Risk, Comments, Plan (and Breastfeeding/TV questions if age appropriate) and click Save & Food Pkg Assign button

8. Select food package and click Save & WIC 75 button

State Risk Code	Federal Risk Code	Description
1010 1020	201 211	LOW HCT/HGB ELEVATED BLOOD LEAD
2040	142	PREMATURITY
2049	152a	HEAD CIRCUMFERENCE BELOW 5TH PERCENTILE
2050 2060	141 114	LOW BIRTHWEIGHT/VL BIRTHWEIGHT AT RISK FOR OVERWEIGHT
2061	111	OVERWEIGHT
2062	103	AT RISK FOR UNDERWEIGHT
2063	101	UNDERWEIGHT
2064	121	AT RISK FOR SHORT STATURE
2065	121	SHORT STATURE
2066	151	GROWTH PROBLEMS
2067	131	INAPPROPRIATE WEIGHT GAIN PATTERN
3010	371	SUBSTANCE USE
3011	904	SECONDHAND SMOKE
4010 4020	601 602	BF INFANT/BF WOMAN AT NUTRITIONAL RISK BREASTFEEDING COMPLICATIONS
4040 4070	601 701 703	BF INFANT/BF WOMAN WITH DIETARY CONCERNS INFANT OF WIC
4075 5011	301	MOTHER/MOTHER AT RISK INFANT OF A MOTHER W/COMPLICATIONS WHICH IMPAIR NUTRITION PREGNANCY INDUCED CONDITIONS
5012	311	DELIVERY OF PREMATURE
5012	312	DELIVERY OF LBW INFANT
5013	321	FETAL OR NEONATAL DEATH
5014	331	GENERAL OBSTETRICAL RISK
6010	341	NUTRIENT DEFICIENCY
6010	342	GI DISORDERS
6010	343	DIABETES
6010	344	THYROID DISORDERS
6010	345	HYPERTENSION
6010	346	RENAL
6010	347	CANCER
6010	348	CNS DISORDERS
6010 6010	349 350	GENETIC/CONGENITAL DISORDERS PULORIC STENOSIS
6010	351	INBORN ERRORS OF METABOLISM
6010	352	INFECTIOUS DISEASES
6010	353	FOOD ALLERGIES
6010	354	CELIAC DS
6010	355	LACTOSE INTOLERANCE
6010	356	HYPOGLYCEMIA
6010 6010	357 359 360	DRUG/NUTRIENT INTERACTIONS RECENT SURGERY, TRAUMA, BURNS JVARTHRITIS,
6010 6020	902	CARDIORESP DS, LUPUS, HEART DS, CF, ASTHMA IMPAIRED ABILITY TO PREPARE FOOD
6030	361 & 362	COMPLICATIONS WHICH IMPAIR NUTRITION
6040	381	DENTAL PROBLEMS
6050	382	OTHER HEALTH RISK
7010	401	PRESUMED DIETARY RISK
7012	411.1	FEEDING PRACTICES - INFANTS
7012	425.1	FEEDING PRACTICES - CHILDREN

7012	427.1	FEEDING PRACTICES - WOMEN
7012	428	FEEDING PRACTICES - INFANTS
7015	402	INAPPROPRIATE NUTRIENT INTAKE
7015	403	INAPPROPRIATE NUTRIENT INTAKE
7020	358a	EATING DISORDERS
7090	901	RECIPIENT OF ABUSE
7095	903a	FOSTER CARE
7098	801	HOMELESSNESS
7099	802	MIGRANCY
8030	501	REGRESSION PRIORITY III
9010	502	TRANSFER

~~0.3~~ 1.3 WIC LABELS

OBTAINING WIC CERTIFICATION LABEL FOR FULLY BREASTFED INFANTS ASSIGNED BF1/F1 FOOD PACKAGE

Household Contains Fully Breastfeeding Infant (single infant or multiple infants) NOT Receiving Benefits (BF1/F1 package) – Printing Certification Label for Infant(s) Only

1. On Member screen, click Save & Issuance.
2. On WIC Benefits Issuance screen:
   a. Click on the “Cert Label Only?” box for participant(s) with a BF1/F1 package.
   b. Click Issue Benefits.
   c. A window will appear with the certification label(s). To print label(s):
      i. Click File or the print icon in the toolbar that appears in the window.
      ii. Select or verify label printer is selected printer.
      iii. Click Print/OK.
      iv. Close window when printing is complete.
3. Place certification label in participant’s medical record(s).

Household Contains Fully Breastfeeding Infant (single infant or multiple infants) NOT Receiving Benefits (BF1/F1 Package) – Printing Certification Label for infant(s) and Issuing Benefits to Other Household Members

1. On Member screen, click Save & Issuance.
2. On WIC Benefits Issuance screen:
   a. Verify/select clinic from the dropdown.
   b. Enter issue date.
   c. Select the type of identification presented from the drop down.
   d. Select member(s) to receive issuance by checking the box next to Patient # or check the “All" box to select all Household Members.
   e. Do not check or uncheck the box next to the Patient # of the participant(s) assigned the BF1/F1 package.
   f. Check the “Cert Label Only?” box for participant(s) assigned the BF1/F1 package.
   g. Select number of months to issue for participant(s) receiving benefits.
   h. Click Issue Benefits.
   i. Two (2) windows will appear: one with the benefits list and shopping list for the household member(s) receiving benefits and one with the certification label(s) and issuance label(s). To print:
      i. Click File or the print icon in the toolbar that appears in the window.
      ii. Select/verify label printer is selected printer.
      iii. Click Print/OK.
      i. Close each window when printing is complete.
3. Place certification and issuance labels in participant’s medical records.
4. Give benefits list and shopping list to participant(s).

Note: The BF1/F1 label can be reprinted through the CDP Report Viewer option.

~~0.4~~ 1.4 WIC REGISTRATION

Rev. 9/2012

REGISTERING FOR WIC CERTIFICATION/RECERTIFICATION

PATIENT(S) WITH MEDICAID, FOOD STAMPS OR KTAP

1. On CDP Portal, click HH Search.
2. On Household Search, enter search criteria for the household and click Search.
3. On Member screen, verify household address and phone number. If new address or phone number, click Edit at top of screen. On Household Edit screen, change address and/or phone number and click Save.
4. Enter/verify number in household.
5. Click Save & Third Party on Member screen.
6. On Third Party Liabilities screen, click box beside name(s) of patients being certified. If all household patients are receiving services, click the All box.
7. Select/verify Medicaid eligibility and enter/verify Medicaid number if applicable. Click in box for KTAP or Food Stamps if patient receives these.
8. Click Save & Income/ Proofs.
9. On Income/Proofs screen, click box beside name(s) of patients being certified. If all household patients are receiving certification, click the All box.
10. Complete initial contact date (if a new certification), proof for residence, proof for identity, adjunct eligibility and adjunct eligibility proof for each patient for certification/recertification.
11. Click Save & Member.
12. On Member screen, click box beside patient name and click Registration.
13. On Registration, ensure all required fields are completed. Make sure correct clinic is on Registration. Update/complete fields as needed.
14. Select WIC Cert/Recert as reason for visit.
15. If address and phone number was not verified on Member screen verify on Registration. Update household address and/or phone number if needed.
16. Enter number for labels needed.
17. Click Save & Member if another household member needs to be registered. If thru with household, click Save & Portal.
18. Window will appear with labels. Click print icon in toolbar that appears in window. Ensure printer is label printer. Click OK/Print. Do not close (X) window until labels are thru printing.

PATIENT(S) FOR INCOME SCREENING

1. On CDP Portal, click HH Search.
2. On Household Search, enter search criteria for the household and click Search.
3. On Member screen, verify household address and phone number. If new address or phone number, click Edit at top of screen. On Household Edit screen, change address and/or phone number and click Save.
4. Enter/verify number in household.
5. Click Save & Income/Proofs on Member screen.
6. On Income/Proofs, click box beside name(s) of patients being certified. If all household patients are receiving certification, click the All box.
7. Complete initial contact date (if a new certification), proof for residence, proof for identity, adjunct eligibility and adjunct eligibility proof for patient(s) for certification/recertification.
8. Click box for Assessing Income.
9. Enter/update household income information:
    a. For Salaried Income/Wages:
        i. To do a new entry for salaries/wages, click Add to open line for data to be entered. Click Add for each entry needed.
        ii. Complete name (of person with wages), employer, pay period, income amount and proof.
    b. For Other Income:
        i. To do a new entry for other income, click Add to open line for data to be entered. Click Add for each entry needed.
        ii. Complete name (of person with other income), income source, pay period, amount, and proof.
10. Click Save & Member.
11. For patient(s) over WIC income guidelines, a Notice of Ineligibility (WIC-54) will appear in a separate window to print. If over WIC income guidelines, Registration must be completed for documentation.
12. On Member screen, click box beside patient name and click Registration.
13. On Registration, ensure all required fields are completed. Make sure correct clinic is on Registration. Update/complete fields as needed.
14. Select WIC Cert/Recert as reason for visit.
15. If address and phone number was not verified on Member screen, verify on Registration. Update household address and/or phone number if needed.
16. In Income section, enter date income was assessed (today's date) in Income Assessed Date. (Income Assessed Date must be completed with date income was assessed to receive 4th registration label.)
17. Enter number for labels needed.
18. Click Save & Member if another household member needs to be registered. If thru with household, click Save & Portal.

19. Window will appear with labels. Click print icon in toolbar that appears in window. Ensure printer is label printer. Click OK/Print. Do not close (X) window until labels are thru printing.

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REMINDERS FOR INCOME DOCUMENTATION FOR WIC CERTIFICATION

- Enter zero (0) in the income field when the participant reports zero household income (i.e. there is no income for the household).

- If an income screening has never been done on the household (for example, participants with Medicaid, KTAP, or Food Stamps), the annual income field will be blank. If income screening is not required, the field should be left blank. CMS will accept a blank income field. If an income screening has been done, the annual income field may contain the annual amount.

- Annual income fields should be blank when income is unknown or has never been assessed (CMS will accept a blank income field). Do not enter nines (99999) for unknown income in any income fields in CMS. Nines in the income field in CMS are considered as a dollar amount (i.e. $99,999). Only enter nines if it is the income amount (i.e. $999.99).

- Nines (99999) appearing in the annual income field on Registration may be from the transfer of income data from Bridge to CMS (99999 was entered in the Bridge system for unknown income). If household income has not been assessed or is not being assessed, nines should be deleted from the annual income field in CMS leaving the field blank (CMS will accept a blank income field); otherwise it will appear that the annual household income is $99,999.

- When household income is assessed for a patient, the Income Assessed Date on Registration must be completed with the date income was assessed to receive the fourth registration label

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WIC PROGRAM DOCUMENTATION FOR KCHIP III ELIGIBILITY

Persons eligible for KCHIP III are not adjunct income eligible for WIC. To identify if a patient is KCHIP III eligible, the Kentucky Health Net Eligibility Verification System will have a "P7" in Program Status. Patients with KCHIP III must be screened for household size and household income. Steps for documenting KCHIP III and income information:

1. On the Member screen, click Save & Third Party.
2. On Third Party Liabilities, select member by clicking box for patient name.
3. In Medicaid Eligible drop-down, select KCHIP 3.
4. Click Save & Income/Proofs.
5. On Income/Proofs, select member by clicking box for patient name.
6. Select proof from drop-downs for Residence and Identification.
7. Select None from Adjunct Eligibility drop-down.
8. Select Not Applicable from Adjunct Eligibility Proof drop-down.
9. Check Assessing Income box.
10. Update existing income info or click Add to add new income info for Salaried Income/Wages and/or Other Income.
11. Complete all required fields for income including proof.
12. Click Save & Member.
13. For patient(s) over WIC income guidelines, a Notice of Ineligibility (WIC-54) will appear in a separate window to print. If over WIC income guidelines, Registration must be completed for documentation.
14. On Member screen, select member by clicking box for patient name.
15. Click Registration.
16. On Registration, complete Income Assessed Date in addition to required fields. Make sure correct clinic is on Registration. Update/complete fields as needed.
17. Select labels.
18. Click Save & Portal or Save & Member.
19. Print labels for documentation.

1.5 WIC VOC

Rev. 10/2012

ADDING AN IN-STATE WIC TRANSFER/VOC USING VOC SEARCH

- User must have security for VOC Search to appear on Portal.
- Once the transfer is completed using VOC Search:
  - An email is automatically sent to the losing clinic to alert staff of the transfer(s).
  - WIC History is updated for the patient(s) transferred.*

VOC Search

1. On Portal, click VOC Search.
2. On VOC Search screen, enter Patient ID # or Name and Birth Date.
3. Click Search.
4. Match displays at bottom of screen in WIC Patients panel if patient has current WIC certification. If name shows in multiple clinics, it is in order by most recent clinic. (Panel displays Clinic, Patient #, Name, Status, Certification Begin Date, Certification End Date, WIC Active, and Terminate Reason (reason shows if terminated**)).
5. To transfer, click green arrow next to Clinic that patient is in.
6. Select VOC Patients screen returns. WIC Patients panel shows all household members who have current WIC eligibility and members' certification info.***
7. Click box next to Patient # to select patient(s) to transfer or click All to transfer all patients.
8. Click Transfer VOC.
9. On VOC Transfer screen, complete Transfer panel:
   a. Transfer WIC Data: Select Yes to transfer WIC info. ("No" transfers patient demographics only).
   b. Residence and Identification proof: Select proof for residence and identification from dropdown for each patient transferring.
   c. County: Verify/select county to receive patient(s).
10. Create a new household or search for the existing household to transfer patient(s) into.

To Create New Household

1. Click Create New Household.
2. VOC Transfer Verification box appears. Click Yes in Complete the VOC Transfer?
3. Transfer Household Add screen returns.
4. Change household Name, Address, City/State/Zip, and Phone Number as needed.
5. Complete Issuance Info panel with Clinic and Identification. Make sure correct clinic is selected.

6. Add/update Responsible Party, Emergency Name, Primary Insurance Company, Supplemental Insurance Company, or Medical Home as needed.
7. Click Save. ****
8. Multiple windows appear with a VOC for patient(s) transferred, a WIC Benefit List (with benefits transferred if patient(s) has eWIC benefits), an issuance label (if patient(s) has eWIC benefits), and Add Card/Cardholder screen to issue an eWIC card (card may be issued now or close window and issue at check out).
9. Member screen displays the new household created with the transferred patient(s).
10. Enter Number in Household on the Member screen and click Save.
11. Register transferred patient(s). Select a member and click Registration.
12. On Registration, complete required and applicable fields. Make sure correct clinic is on Registration. Enter Reason for Visit of WIC VOC. Select needed labels and click Save & Member or Save & Portal. (Do not click Save & VOC).
13. Issue benefits as appropriate at checkout based on date due. Date due is shown on WIC Benefits Issuance screen in Next Issuance Due and date reflects any transferred benefits.

To Transfer to Existing Household

1. Enter household number, name, etc. for existing household to transfer patient(s) into.
2. Click Search.
3. Match from search displays at bottom of screen in Household panel.
4. To transfer, click green arrow next to Household # to transfer patient(s) into.
5. WIC Transfer Verification box appears. Click Yes in Complete the VOC Transfer?
6. Transfer Household Edit screen returns with household info. Edit household info as needed.
7. Complete Issuance Info panel with clinic and identification. Make sure correct clinic is selected.
8. Add/update Responsible Party, Emergency Name, Primary Insurance Company, Supplemental Insurance Company, or Medical Home as needed.
9. Click Save.
10. Multiple windows appear containing a VOC for patient(s) transferred, a WIC Benefit List (with benefits transferred if patient(s) has eWIC benefits), an issuance label (if patient(s) has eWIC benefits), and Add Card/Cardholder screen to issue an eWIC card if household does not have an eWIC card (card may be issued now or close window and issue at check out).
11. Member screen displays with transferred patient(s) added in existing household.
12. Update number in household and click Save.
13. Register transferred patient(s). Select member and click Registration.
14. On Registration, complete required and applicable fields. Make sure correct clinic is on Registration. Enter Reason for Visit of WIC VOC. Select needed labels and click Save & Member or Save & Portal. (Do not click Save & VOC).
15. Issue benefits as appropriate at checkout based on date due. Date due is shown on WIC Benefits Issuance screen in Next Issuance Due and date reflects any transferred benefits.

* Certification history from the previous clinic is transferred and shows in the WIC Certification History along with the VOC for the transfer.

**A participant who has WIC eligibility but has been terminated can be transferred. However, the participant's terminated status is transferred. Before any benefits can be issued to a terminated participant, the reason for termination must be reviewed and a reinstatement done if appropriate.

***Select VOC Patients includes the Next Issuance Due date. Use this date along with information gathered from the participant to determine when to complete the VOC or schedule the participant for service. If the participant is in clinic and benefits are due, complete the VOC process; if benefits are not due but a new eWIC card is needed to access benefits, complete the VOC (i.e., if a member(s) from a household is transferring but a member(s) still remains in the household, such as a child transferring while mom, or another child, receives WIC benefits and has the card, complete the VOC and issue a new card to access the transferred benefits); if benefits are not due and the entire household has transferred and has the eWIC card, cancel the VOC and schedule an appointment as needed to complete the VOC .

*******Note: If address or phone number matches an existing household, a duplicate household warning will appear. To proceed, click Continue Save; to cancel, click Cancel.*

Rev. 10/2012

ADDING AN OUT-OF-STATE WIC PARTICIPANT

For an out-of-state-participant:

To be valid, the VOC must contain, at a minimum, the name of the participant and the beginning and ending dates of the certification period, and there must be eligibility remaining. If the VOC is determined to be invalid, the transferring site may be contacted for necessary information. If information cannot be obtained, the person must be screened as a new applicant in the receiving site.

Residence requirements must be met. Request to see proof of residence and identity of the individual being transferred. If proof cannot be provided, refer to the WIC and Nutrition Manual, Certification and Management Section, WIC Eligibility Requirements, "Applicant Unable To Provide Proof Of Residency At WIC Certification" and/or "Applicant Unable To Provide Proof Of Identity At WIC Certification."

1. On Portal, click HH Search.
2. Enter search criteria and click Search (transfer patient(s) may be added to an existing household or create a new household).
3. On Member screen, click Add to open line to enter patient info.
4. Complete required fields (Member, Patient #, Name, Birth Date, and Gender).

5. Complete/update Number in Household.
6. Click Save.
7. Check box for the patient.
8. Click Registration.
9. On Registration, complete all applicable and required fields. Enter Reason for Visit of WIC VOC.
10. Click Save & VOC.
11. On VOC, enter all required fields: Proof of Residence and Identification, Beginning and Ending Certification Date, and Status; once status is entered, the screen auto-fills VOC risk (risk code 502). Be sure to check beginning and ending certification dates and enter correctly.
12. Click Save & Food Package.
13. Window will appear containing a VOC label; print label for placement in the medical record.
14. On Food Package Assignment screen:
    Option A: If food package information is provided by the previous clinic, consult with health professional for food package assignment ***PRIOR*** to selecting the food package, select the food package, click save and proceed to step #15); ***<u>or</u>***
    Option B: If food package information is not provided by the previous clinic, a health professional must assign a food package. Click Member, arrange for participant to see health professional, and proceed to step 15.
15. On Member screen, request labels:
    a. Check box for the patient.
    b. Click Labels.
    c. Enter number in needed labels and click Create.
    d. Labels appear in window to print; when labels have been printed, click Done.

- WIC VOC

Kentucky WIC Program
Verification of Certification

Patient Information

HH #	1147	Certification Date	10/15/2012
Name	ZOE ZANE	Certification End Date	04/15/2013
Gender	Female	Age	1 Years 3 Months 24 Days
Birth Date	06/21/2011	Status	Child
EDC		Priority	3A

Height & Weight

Date of Measures	10/15/2012
Height	0 ft. 30 in.
Weight	23 lbs. 0 oz.
BMI	17.97
Gestational Age	
PPW	0 lbs. 0 oz.

Bloodwork

Date of Measures	10/15/2012	
Hemoglobin	9	gm/dL
Hematocrit		%
Lead Count		µg/dL

Additional Information

Breastfeeding No Ever Breastfed No How Long

Age in Weeks Formula or Other Food Given 0 Months 0 Weeks 0 Days

Hours per day watching TV 1 Hour

Risk Assessment

Risk Code	Priority	Referral
142 - Prematurity (Birth at <= 37 weeks gestation) (up to age 2) (age adjusted)	3A	
141a - Low Birth weight <= 5 lb 8 oz/2500 grams (LBW) up to 2 years of age	3A	
201g - Hematocrit <= 32.8% or Hemoglobin <= 10.9 gm/dl (age 9.0 months to 1.9 yrs)	3A	Hematocrit <= 27% or hemoglobin <= 9gm/dL refer ME

Food Package
CB - child with cheese

Issuance Information

Last Issuance 10/28/2012 - 11/27/2012
Next Issuance 11/28/2012

Agency KY DEPT PUBLIC HEALTH
Clinic LOCAL HEALTH TEST SITE

Lexington, KY, 40511
Phone # (502) 695-1999

Signature: ______________________ Date: 11/01/2012
Janet Johnson

- WIC VOC Transfer Email Alert

10/2012

WIC VOC TRANSFER EMAIL ALERT

An email is automatically sent from a transfer using VOC Search. The email is sent to the agency losing the participant(s) through VOC Search.

From: CDP [mailto:info@cdpehs.com]
Sent: Monday, October 08, 2012 10:14 AM

Subject: Transfer Email Alert

Clinic Losing HH member(s) in VOC Transfer

County: 500 - LOCAL HEALTH
Household Number: 11

Clinic: 500500 - LOCAL HEALTH TEST SITE
Member Date of Birth: 7/30/2011

Date of Transfer: 10/8/2012 10:14:18 AM
Agency Received: 002002 - ALLEN COUNTY HEALTH DEPARTMENT - (270) 237-4423

Appendix B

UPDATE SUMMARY

Kentucky CMS User Guide Update Summary for Version 2.2 May 19, 2014	
Section	**Description of Update**
Table of Contents	Updated
Labels	Updated Labels section with screenshots of labels
Measures and Blood Work Edit	Section added to the user guide, text and screen shots
Edit Client (state use only)	Updated Edit Client section to include FMNP, Portal News, and make the number of issuance months configurable, updated text and screen shots
Client Search (state use only)	Updated Client Search to include fields for Web Printing and WHO Charts, updated text and screen shots
New Measures/ Blood Work	A new feature has been added to the Measures screen to support non-invasive hemoglobin measures, updated text and screen shots
New Measures/ Blood work	Edits have been put in place to only allow one hemoglobin or hematocrit entry. Added note that an error message will be displayed if both measures are entered, updated text
Registering a New Patient	A new field has been added to the Registration screen to select an Alert Preference for the auto dialer, updated text and screen shots
Registering a New Patient	A checkbox has been added to the Registration screen, “Patient will not answer race (FP pats only).” This option is for family planning patients only, updated text and screen shots
Household Search/Patient Search	Added a search filter for cell phone # to the Household/Patient Search screen