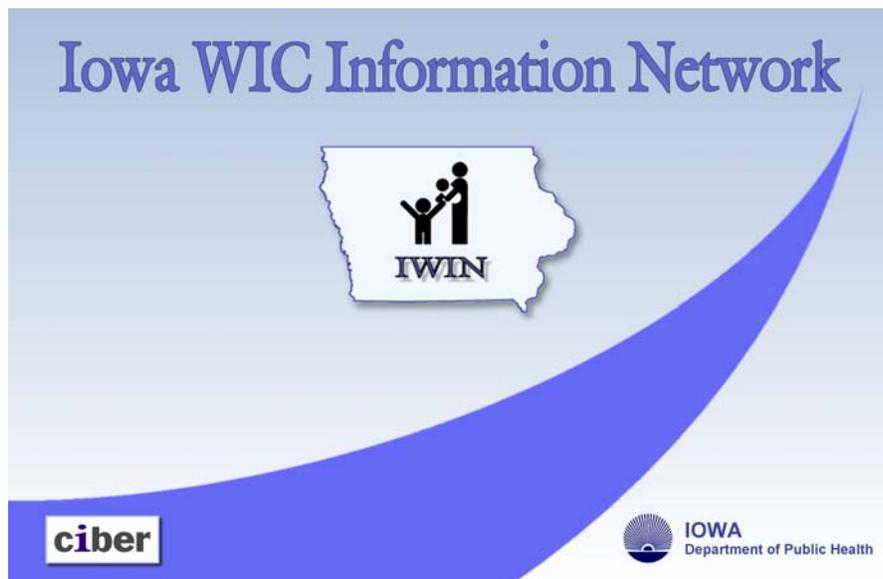


# IWIN Helpful Hints

## (and other useful information)



Updated January 5, 2009

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### What The WIC Status Values Mean For A Participant

- **Pending** – There are three reasons why a participant gets a Pending status:
  1. Pending is automatically assigned to every new participant when an appointment is schedule or you create a new application from clinic services. They remain Pending until they are either certified or marked ineligible.
  2. A participant who was certified and then later terminated can reapply for WIC benefits at a future date. You begin the process of certifying a terminated participant by creating a new Participant Application from the link on the Family tab. When you click the New button, an application date with today's date is indicated and their status changes to pending as if they were new.
  3. A participant who applied for WIC benefits but was found to be ineligible can reapply for WIC benefits at a future date. You begin the process of certifying a terminated participant by creating a new Participant Application from the link on the Family tab. When you click the New button, an application date with today's date is indicated and their status changes to pending as if they were new.
- **Active** – This status is assigned to a participant when they are successfully certified. They will remain Active until they are terminated.
- **Terminated** – When a certified participant is to stop receiving WIC benefits, their status must be changed to Terminated. Terminated status can be set manually by clinic staff. Terminated status is also automatically set under certain circumstances, for instance, when a child reaches their 5<sup>th</sup> birthday, when a breastfeeding or postpartum woman reaches her categorical eligibility end date, and when children are not recertified at the end of their certification period.
- **Ineligible** – This status is assigned to new participants who are ineligible for WIC benefits because they are over income, categorically ineligible, or don't live in our state. Normally, in this situation, their status would change from Pending to Ineligible.

### Data Entry Hints

#### Using the Scroll Wheel

Do you have a scroll wheel on your mouse? If you do, you can use it to scroll up or down on any control that displays a scroll bar. Examples where you will find this to be convenient are the Health and Diet tabs, the list of available risks on the Risk tab, and the list of available and planned topics on the Nutrition Ed tab. Two things to be aware of:

1. To make the scroll wheel work, the control you want to scroll must have “focus”. What does that mean? In the case of the Health and Diet tabs, you must be adding or editing a questionnaire and the cursor must be placed inside a field (any field will do) within the questionnaire. In the case of controls like the available risk or nutrition education topic lists, one item in the list must be clicked before the scroll wheel will work. Clicking the plus sign to expand the lists will satisfy this requirement.
2. Beware! If a drop down list control has focus (it will be highlighted in blue), using the scroll wheel scrolls through the items in that drop down list. Be careful that you don't accidentally change a value in a drop down list!

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#### Masked Text Fields

All phone number fields and some date fields are displayed with a mask to make them easier to enter and read.

An empty phone number field displays with this mask: ( ) \_\_\_\_-\_\_\_\_. To enter a phone number, you simply type the digits, not the hyphen. When you type 5157114455, the mask displays (515) 711-4455.

Date of Birth is a good example of a date field with a mask. When you add a new participant, Date of Birth displays as \_\_/\_\_/\_\_\_\_. When you enter the date you only need to type the numbers, not the slashes. For a participant born on July 17, 1987, you will type 07171987. The Date of Birth field will display like this when you're done: 07/17/1987.

*Note: When directly typing a date into a masked date field, and the month or day value is less than 10, you must type a leading zero. For a participant born on January 1, 1987, for example, you must type 01011987, not 111987.*

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#### Selecting Data from a Drop Down List

A value can be selected from a drop down list using one of three methods:

1. Click the down arrow to the right of the drop down control. That will display the list of values. Click the text of the value you want to select.
2. Click or tab into the drop down control to highlight it and then type the first character of the text of the value you want to select. If there are multiple entries in the drop down that begin with the same letter, each time you type that letter, it will scroll to the next entry on the list. For example, if you're on a drop down list of State names, each time you type A, it will scroll through and display the list of states that begin with “A”, like Alabama, Alaska, Arizona, and Arkansas.
3. Click or tab into the drop down control to highlight it and then use the scroll wheel on your mouse to scroll through the list.

### Working with Pop-up Screens

There are two ways to close a pop-up screen that can be edited, such as the Contact/Address screen or the Member screen:

1. Click either the  button
2. Click the  icon. This is **NOT** a cancel function.

Regardless of the method you use to close the screen, any changes you made to data on the screen will be retained. However, these changes have not been saved to the database yet. That won't happen until you actively save your changes.

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### Correcting Mistakes

If you make updates on a pop-up screen and then change your mind, you have several options to correct the mistake:

1. If you accidentally clicked , you can use the  button to remove the record that you started as long as you haven't saved the information. This also works for other places in the application.
2. If the only change you made to a family is the update you just made on a pop-up screen, you can use the Refresh option of the File menu. This will re-read the database and your updates will be lost. Be careful using this option! **All changes** you've made on the family since your last save will be lost, not just the changes you made on the pop-up screen.
3. If you've made a lot of other changes that you want to keep, using the Refresh menu option isn't a good way to correct a mistake. In that case, simply open the pop-up screen again and edit the data.
4. On the Family Tab, if you clicked on the New Member link by mistake, just click , and you will be able to close the pop-up screen. If you clicked on "Make Participant" by mistake, just click the "Back" button at the bottom of the screen and then you can either change the information or totally delete the participant.

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## IWIN Helpful Hints

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### Health and Diet Questionnaire Yes and No Answers

The Health and Diet tab questionnaires contain many questions with Yes or No answers. The Yes and No are displayed as radio buttons.

1. If you have not answered a question at all, both radio buttons are blank and look like this  
 Yes  No .
2. To answer a question, click either the  Yes or  No radio button.
3. If you answered  Yes , but you meant  No , simply click the  No radio button. The  Yes radio button will be automatically un-checked for you. If you answered  No but really meant  Yes , simply do the opposite.
4. If you answer  Yes or  No and then decide you don't want to answer the question at all, click the same radio button again and it will become un-checked.
5. Sometimes when you answer  Yes to a question, it enables a number of additional possible answers. Often these optional answers are in the form of check boxes. For example, every Health questionnaire has some form of this question: "Do you currently have any medical conditions, illnesses, or disabilities? If yes, what?" If you answer  Yes , a series of possible diseases and conditions are enabled, such as Asthma, Bronchitis, Cancer, etc. Each answer has a check box. You may check as many answers as applicable.
6. If you've clicked  Yes and checked one or more additional answers and then later click the  No radio button, the check marks in your additional answers will be automatically removed and all the additional answers will be disabled. The same thing happens if you've clicked  Yes and checked one or more additional answers and then later click the  Yes radio button again to un-check it.
7. If you've said  No or left an answer unanswered, use the Tab key to take you to the next answer that can be answered, bypassing any disabled answers in between.

### Cut, Copy, and Paste Functions in Scheduler

Within Scheduler, you can use the cut, copy, and paste commands to work with scheduled appointments. If you right click on an appointment, a context menu appears. This gives you access to the Delete function as well as the Move, Copy, and Paste functions.

To delete an appointment:

Right click the appointment and click the “Delete” option from the context menu.

To delete an appointment and move it to a new time slot:

1. Right click the appointment and click the “Move” option from the context menu.
2. Go to the time slot where you want to move the appointment. This can be on a different day, a different column, or even a different clinic.
3. Right click in the new available time slot and click the “Paste” option.
4. The appointment is copied into the new time slot. The original appointment is deleted and its time slot is now available to make new appointments.

To copy an appointment from one time slot to another:

1. Right click the appointment and click the “Copy” option from the context menu.
2. Go to the time slot where you want to copy the appointment. This can be on a different day, a different column, or even a different clinic.
3. Right click in the new time slot and click the “Paste” option.
4. The appointment is copied into the new time slot. The original appointment remains unchanged. This is a good way to copy a recurring appointment such as a nutrition education class. To make additional copies of the appointment, repeat steps 1 thru 5.

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### Cut, Copy, and Paste Functions in Clinic Services

Within Clinic Services, you can use the standard Cut, Copy, or Paste hot keys CTRL+X, CTRL+C, or CTRL+V to work with text inside any text control that does not contain a mask (like a masked date or phone number). You may find this handy to copy information from one Care Plan to another or from a comment to a Care Plan. You can even copy standard boilerplate text from a Word document into a Care Plan or other text field within IWIN.

To perform the basic Cut, Copy, or Paste functions:

1. Highlight the text to be cut or copied first. Put the cursor at the beginning or ending of the text you wish to select, hold down the left mouse button, and move the cursor to highlight the required text.
  - CTRL + X deletes the selected text from where it was and places it into the paste buffer.
  - CTRL + C leaves the selected text where it is but places a copy into the paste buffer.
2. Once you have text in the paste buffer, place the cursor into the field where you want the new text to appear and click the Paste menu option or use the Paste hot key (CTRL + V). You may paste the same text multiple times.

### The Copy Button

#### On The Family Tab

If you choose an issuance period at the bottom of the Family Screen, then click Copy, IWIN copies this period to all family members. Individual family members may be changed to a different issuance period by making a different choice in the drop down box in their member information area.

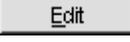
#### On the Nutrition Ed Tab

After you identify nutrition topics that were discussed with one participant, you can copy those same topics to other participants in the family. When you click the Copy button, a pop-up screen is displayed with the names of all other participants in the family. Click the check box next to each name that should also get credit for these topics and Close the pop-up. The participants you have checks will have a new nutrition ed record created automatically.

*Note: The Copy function only copies Completed Topics. Planned Topics are not copied.*

### New Versus Edit

Most of the time, you will be *adding* new data rather than *editing* existing data when you're updating a family's or participant's data within Clinic Services. That means you'll be using the  button almost exclusively and only rarely need the  button. Each time you want to record anthropometric measurements or blood work results or make a new income determination, you'll be using the  button. Naturally, there are exceptions to every rule (who would've guessed, huh?):

1. Most new data can be edited on the same day it was created. In other words, if you add new anthropometric data today using the  button and later today realize you made a mistake, you can use the  button to correct the error. Tomorrow you won't be able to edit this data. To correct an error tomorrow, you'll need to create another new anthropometric record with the correct data. This general rule applies to the data found on the Contract/Address, Participant Eligibility, Income, Voter Registration, Breastfeeding, Blood, Anthro, Health, Diet, Risk, Nutrition Ed, and Food Package screens.
2. A Care Plan can also be edited on the same day it was created, but only by the person who created it. No other staff members can edit a Care Plan on the day it was created. And even the person who creates a Care Plan will not be able to update it tomorrow. You may add additional information to the Care Plan on the following day by creating a new Care Plan.
3. There is one screen where you will normally be editing the existing record rather than creating a new one.
  - a. The Pregnancy tab is used to record all the information about one complete pregnancy, from pregnancy through the postpartum results. After creating a new Pregnancy record using the  button, you should use the  button to update the pregnancy record after the participant gives birth. If you click the  button a second time before updating the postpartum section of the first pregnancy record, you will get a warning message. If this is truly a new pregnancy, click OK. If you really mean to update the postpartum section of the first pregnancy, click cancel and edit the first pregnancy record instead.

## IWIN Helpful Hints

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### Summary of When You Can Edit a Clinic Services Screen

These screens can only be edited on the same day you created the new data:

- Participant Eligibility
- Income
- Voter Registration
- Blood
- Anthro
- Health
- Diet
- Risk
- Nutrition Ed (completed topics)
- Food Package
- Transfer Family
- Survey

This screen can only be edited on the same day you created the new care plan and only by the person who created the plan: Care Plan

These screens can be edited anytime:

- Members
- Enrollment
- Contact / Address
- Income Family
- Pregnancy
- Breastfeeding
- Certification – Termination data
- Comments
- Referrals
- Waiting List
- Violations

### Pregnancy versus Breastfeeding tabs – Who’s Who?

- The Pregnancy tab is used to record information about a Pregnant, Breastfeeding, or Non-Breastfeeding Postpartum woman. It is also used to update a previously recorded pregnancy record with postpartum results.
- The Breastfeeding tab is used to record an infant’s or child’s breastfeeding history. You *must* create breastfeeding data for all infants and children through age 2. You may *optionally* record breastfeeding information for children older than age 2.
- You can record breast pump information by using the [Breast Pump](#) link from either the Pregnancy or Breastfeeding tabs. It doesn’t matter whether you start from the Pregnancy or Breastfeeding tab.....there’s only one set of breast pump data.

### What Kind Of Address Data Is Available For Families?

The application contains two kinds of addresses:

1. Physical - - required for every family.
2. Mailing: - -optional and should be used only if it is different than the family’s physical address, for example, if they use a P.O. Box for their mail.

The address in the New Family screens in Scheduler is the physical address.

All output documents generated by the application (VOC, letters, labels) look for a mailing address first. If one exists, the mailing address is used on the output document. If there isn’t a mailing address, the physical address is used on the output document instead.

NOTE: Once there is a mailing address in IWIN, that is what will be used for documents. If the mailing address changes to the physical address, the information must be updated in the mailing address group box.

## IWIN Helpful Hints

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### IWIN Alerts

The system displays alerts whenever clinic staff selects a family from a search result and any participant in the family meets an alert criterion. There are two types of alerts:

1. Manual alerts are created directly by clinic staff. They create a manual alert by creating a “Comment” and checking the “Display as Alert” check box on the comment screen. The text of the comment is displayed as the alert each time the family is selected after a search.. Manual alerts continue to be displayed until the Expiration Date of the comment.
2. System alerts are automatically displayed when a family is selected from a search and any participant within the selected family meets an alert trigger criteria. The sections below describe some common system alerts and how to clear them.

Message Text	Alert Set Trigger	Alert Clear Trigger
Blood work is required by an infant's first birthday.	Displayed when an Infant is selected that is more than 9 months old and there is no Blood record with a Hgb or Hct value and a Blood Work Done on Date on or after the infant's 6 month birthday.	Provide blood work data with a hemoglobin or hematocrit value.
No breastfeeding data has been collected.	No breastfeeding data was collected for an Infant.	Provide breastfeeding data.
Breastfeeding mother is not linked to an infant.	A participant marked as a Breastfeeding mother does not have a link to her breastfeeding infant.	Link the breastfeeding mother to her breastfeeding infant by indicating the infant's name in the “Infants Born From This Pregnancy” list on the Pregnancy tab.
Participant type indicates the participant is a breastfeeding woman but the latest breastfeeding data indicates the participant is not breastfeeding.	Displayed for a Breastfeeding woman when the breast-feeding data of her linked infant does not have “Currently Breastfed” checked on the Breastfeeding tab.	Either check the “Currently Breastfed” indicator for the associated infant (if it is truly being breastfed) OR change the woman to Not-breastfeeding postpartum OR terminate the woman if > 6 months post partum.
Participant type indicates the participant is a Not-breastfeeding postpartum woman, but the latest breastfeeding data indicates the participant is breastfeeding.	Displayed for a Not-breastfeeding postpartum woman when “Currently Breastfed” is checked on the Breastfeeding screen for her linked infant.	Either update the linked infant's Breastfeeding record with breastfeeding termination data (if the infant is no longer being breastfeed) OR recertify the woman as Breastfeeding.

## IWIN Helpful Hints

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Message Text	Alert Set Trigger	Alert Clear Trigger
Is this infant still breastfeeding?	Participant type is Infant and the Breastfeeding record still has Currently Breastfed checked.	<p>If the infant is still being breastfed, do nothing unless this is a certification appointment. *</p> <p>If the infant has truly stopped breastfeeding, update the Breastfeeding record with breastfeeding termination data and change the Breastfeeding mother participant type to Not-breastfeeding OR terminate if &gt; 6 months postpartum.</p>
Is this child still breastfeeding?	Displayed for Participant Type = Child when the child is more than 1 year old and the Breastfeeding record still has "Currently Breastfed" checked.	<p>If the child is still being breastfed, do nothing unless this is a certification appointment. *</p> <p>If the infant has truly stopped breastfeeding, update the Breastfeeding record with breastfeeding termination data.</p>

\*Note: Breastfeeding status must be updated at every contact with the infant or the infant's mother until breastfeeding is terminated or the infant/child leaves the program. This includes Health Updates, Nutrition Appointments, subsequent certifications, and any other contacts.