

Breastfeeding Peer Counselor Navigation of Focus

ACCESSING FOCUS

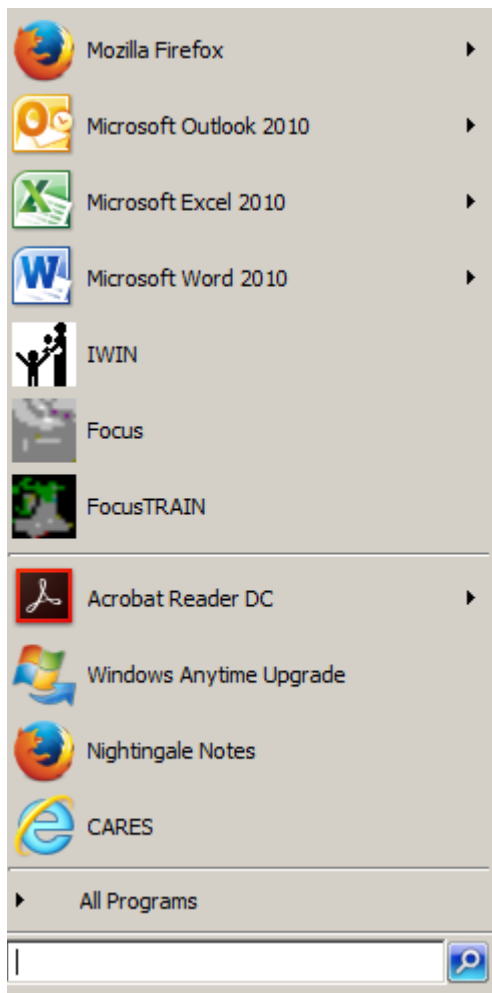
Focus is accessed through the Start menu and not through a Desktop shortcut.

- 1) Click on Start for **state-issued computers with Windows 7:**



For **County-issued laptops with Windows 8**, click on the folder symbol on the bottom left of the screen (that is the Start button in Windows 8) to access Focus icons.

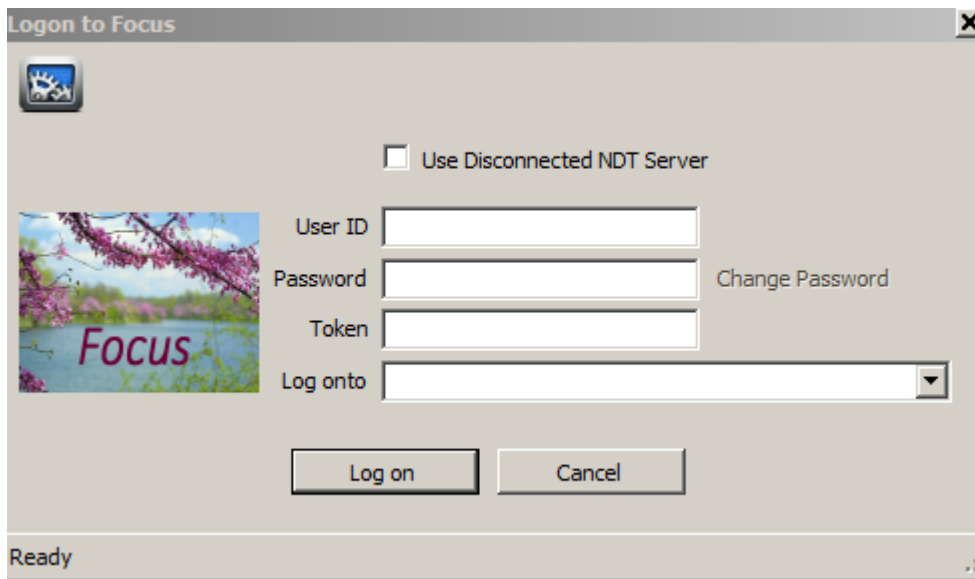
- 2) Click on Focus.
if using a state-issued computer it looks like this:



Both Focus and Focus Train will be clearly marked on Windows 8 (County-issued laptops).

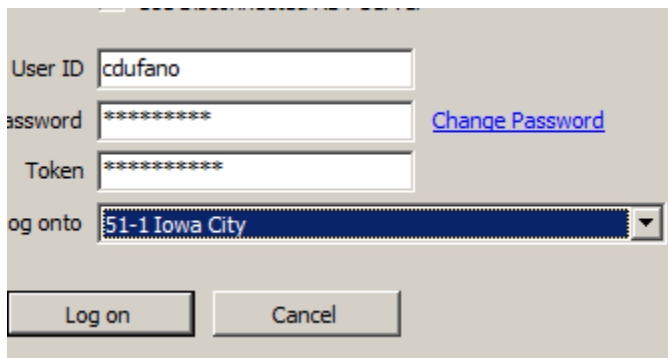
LOGIN TO FOCUS

1. After you access Focus, the “Login to Focus” box appears.



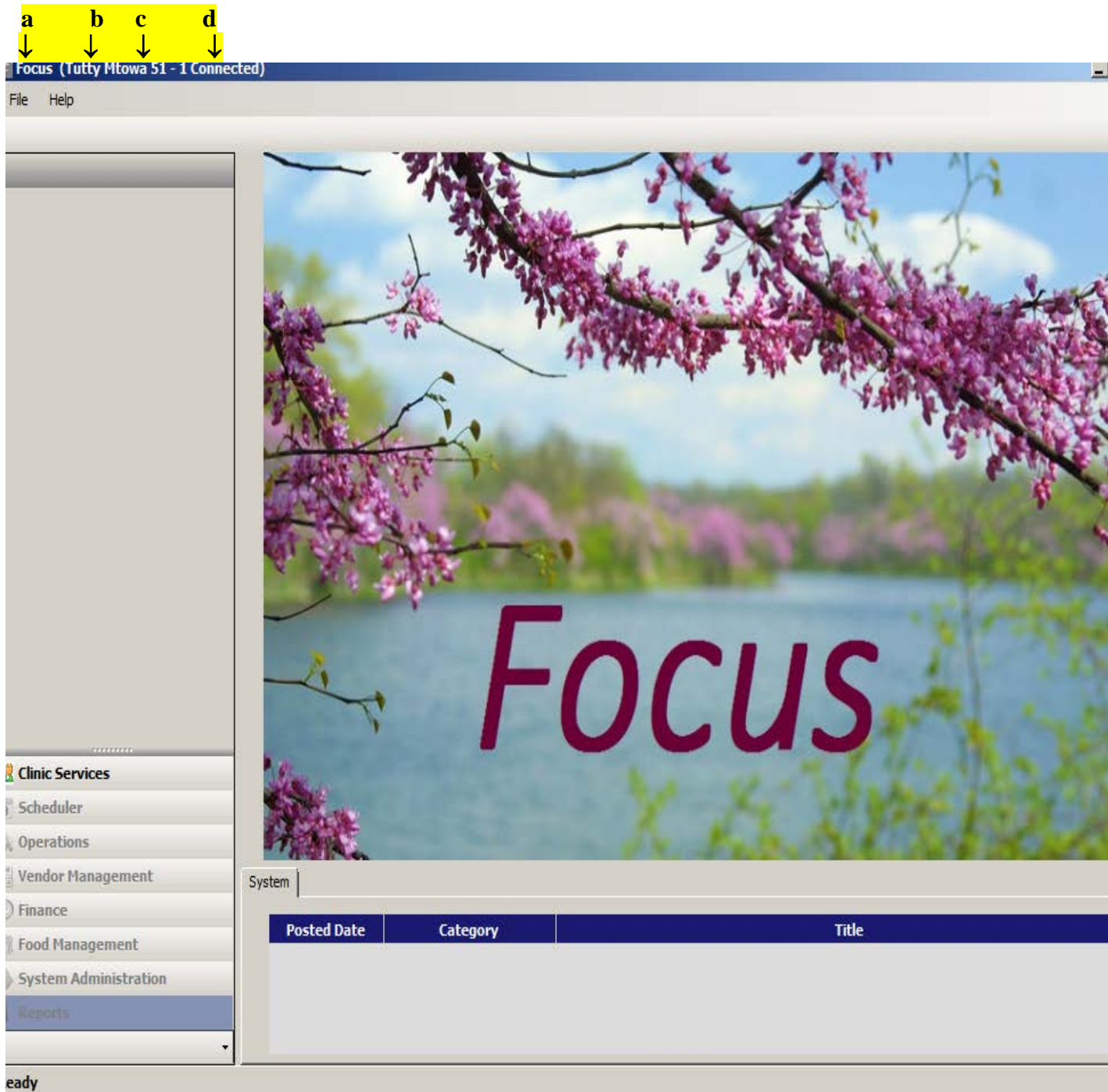
2. Enter user ID, password, and token. Token is the number on the token screen plus a four digit PIN (default PIN is the last four numbers of the token serial number). Do not enter anything in the “Log onto” field.
3. Click on “Log on” button or press the “Enter” key.

To change your password: After you enter your user name, password, and token number with the four digit PIN then press the “Tab” key instead of “Enter” or instead of clicking on “Log On” button. The Change Password link should go from gray to blue and “51-Iowa City” will appear in the “Log onto” field. Click on the Change Password link to change your password.



FOCUS MAIN MENU

The screen you see immediately after login will show the main menu. If you look at the very top left you will see a) the word “Focus”, b) your name, c) WIC agency number and clinic number (more on this in the Advanced Search section), and d) if you are connected. It would read “Focus Train” if you were in the training version of Focus. Be sure to check this to ensure you are in the version of Focus you intend to be working. Focus Production has a picture of a tree branch with purple flowers; Focus Train has a picture of a bridge. Also check to see that you are connected (i.e. in communication with the state database).

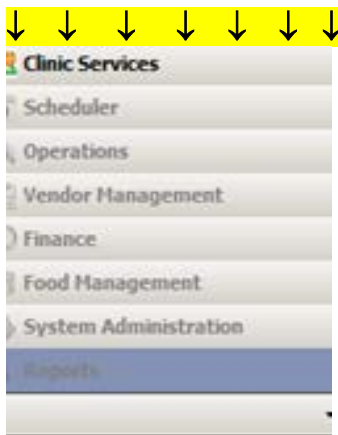


See below for a screen shot of Focus Train:

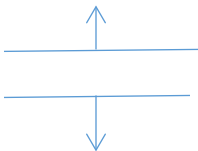


You will notice the main menu has several options, but only Clinic Services is bolded. You will only be able to access Focus sections that are bolded. You can lower the Clinic Services button all the way to the bottom of the screen (i.e. push all the grayed out buttons down). This is done by:

- 1) Put the cursor at the top line of the Clinic Services box,



- 2) Wait for the cursor to look like this:



- 3) Hold the left click on the mouse and drag the Clinic Services button to the bottom of the screen.

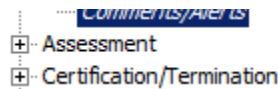


PANELS AND BRANCHES (SCREENS)

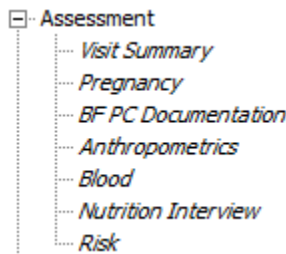
Panels are a collection of similar functions in Focus, for example, the Search panel is how you find a client in Focus; the Assessment panel contains the screens with diagnostic and measurable data as well as answers to interview questions. The branches off the panels are the specific tasks within each panel. For example, the branches under Assessment are the pregnancy data, BFPC documentation, anthropometric information, hemoglobin scores, nutrition interview questions, and risk assessment.

Panels are collapsed (i.e. branches are not seen) when a plus sign (+) appears to the left of the panel name. If you click on the plus sign, the panel will expand to reveal all the branches and now a minus sign (-) will appear to the left of the panel name. Clicking on the minus sign will collapse the panel again.

Panel Collapsed



Panel Expanded



ACCESSING PANELS

To access a specific branch, click on the branch name (or task). Note: Clicking on the panel name will not do anything. For example, if you want to look up an infant’s weight, you would click on the + next to Assessment to expand the branches and then click directly on the word “Anthropometrics”. If you just clicked on “Assessment” nothing would happen.

Below is a table of all panels and branches available under Clinic Services. Breastfeeding peer counselors will not have access to all of these screens. Screens for which BFPCs do not have access will appear, but will be grayed and nothing will happen if you click on them.

For the remainder of this tutorial, branches will be referred to as “screens”.

Panels/Screens Under Clinic Services and BFPC Access

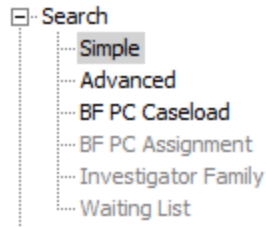
Panel	BFPCs have access and can enter info	BFPCs have access, but “Read Only”	BFPCs do not have access
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Search	Simple; Advanced; BFPC Caseload	None	BFPC Assignment; Investigator Family
Family/Intake	Comments/Alerts	Family; Identity; Contact/Address; Participant Category	Certification Guide; Income; Voter Registration; Application
Assessment	BPFC Documentation	Visit Summary; Pregnancy; Nutrition Interview	Anthropometrics; Blood; Risks
Certification	None	None	All
Education/Care	Referral – Participant	Nutrition Education; Care Plan-Participant; BF Equipment	Referral-family; Care Plan-family
Foods	None	None	All
Activity	None	Appointment History; Transfer Family; Retrieve Participant	Survey; Customer Service Log; Participant Violations; Admin Hearing

Clinic Services

- [-] Search
 - Simple
 - Advanced
 - BF PC Caseload
 - BF PC Assignment
 - Investigator Family
 - Waiting List
- [-] New Family
- [-] Family/Intake
 - Certification Guide
 - Family
 - Identity
 - Contact/Address
 - Income
 - Voter Registration
 - Application
 - Participant Category
 - Comments/Alerts
- [-] Assessment
 - Visit Summary
 - Pregnancy
 - BF PC Documentation**
 - Anthropometrics
 - Blood
 - Nutrition Interview
 - Risk
- [-] Certification/Termination
 - Certification
- [-] Education and Care
 - Referrals - Participant
 - Referrals - Family
 - Nutrition Education
 - Care Plan - Participant
 - Care Plan - Family
 - BF Equipment
- [-] Foods
 - Food Package
 - Issuance Summary
 - Returned Formula
 - Card Operations
 - Food Benefits
 - Audit Trail
 - FMNP
- [-] Activity
 - Appointment History
 - Transfer Family
 - Retrieve Participant
 - Survey
 - Customer Service Log
 - Participant Violations
 - Admin Hearing

SEARCH PANEL



When you first click on Client Services you will see the Search panel. You can also click on the + next to Search to expand the branches and then click on the word of the kind of search you want to do (e.g. simple or advanced).

SIMPLE SEARCH

You can look up a family using:

- a) Family ID (FID); all members of the family have the same FID,
- b) Each individual of the family has their own Person ID
- c) The PAN is the number that is listed on the family's eWIC card.

ADVANCED SEARCH

With advanced search you can look up a family by first and/or last name, date of birth, zip code, or phone number.

Some additional advanced search features:

- Checkbox “Soundex” if you’re not sure of a name’s spelling – the results will be all names that sound like the one you enter
- Checkbox “Include Alias Name” for names client used to have (e.g. maiden name; infant’s last name before adoption)

- Type % before or after part of a name and the result will be all names that include those letters. For example, if you typed Smi% you would get all names that start with “Smi”. If you typed %own you would get all names that have “own” as the last letters.
- Checkbox “Show All Family Members” – when checked all family members are shown for all people whose name you entered; click to uncheck the box to specifically search only for the name you entered. (An example of when you’d check the box is when you know mom’s name but not baby). This box is automatically checked when you click on Advanced Search.
- Advanced Search defaults with no LA ID specified, and this is the typical way to search. If you search with a blank LA ID field, you are searching all WIC clients in Iowa.
- LA ID means Local Agency ID. There are 20 WIC agencies in Iowa and each one has an agency number. We are Agency 51. If you click the drop box arrow in the right of the field the only option is Agency 51. Every clinic site in each agency has its own Clinic ID. If you click on LA ID, you must then select a Clinic ID (see below). The Clinic IDs for Agency 51 are: 1 – Iowa City; 3 – Washington County; 6 – Iowa County; 11 – UIHC; 15 – Cedar County; 48 – Migrant clinics. You would use this feature as needed if you wanted to narrow your search. If you specify Agency 51 and your client does not come up, you can try without a LA ID specified to see if the client moved to another agency.

The screenshot shows the 'Advanced' search interface. At the top, it says 'Advanced' in a grey header. Below that, it prompts the user to 'Enter one or any combination of search fields'. The form includes several input fields: 'LA ID' with the value '51', 'Clinic ID' with a dropdown menu open showing options '1', '3', '6', '11', '15', and '48', 'Last Name', 'Date of Birth' with a date picker, 'ZIP Code', and 'Home Phone Num'. There are also checkboxes for 'Show All Family Members' and 'Advanced Search'.

Results of Advanced Search

See screenshot below for all the info that comes up for the client for search results. To access a specific client, click on the blue link under the Family ID or Person ID columns.

Advanced

Enter one or any combination of search fields

LA ID Clinic ID

Last Name First Name Include Alias Name

Date of Birth Soundex

ZIP Code Home Phone Number Statewide Sketch

Show All Family Members

Search Results (Advanced)

Family ID	LA-Clinic	Person ID	Name	Category	DOB	WIC Status	ZIP	Phone
3587990	31-81	3847439	Brad Johnson				50317	(515) 299-2824
3587990	31-81	3847400	Katie Walters	Not Breastf...	08/11/1983	Terminated	50317	(515) 299-2824
7004071	51-1	8004136	Brad Johnson	Infant	02/05/2016	Active	52240	(319) 530-1111
7004071	51-1	8004135	Jane E Johnson	Breastfeeding	02/01/1990	Active	52240	(319) 530-1111

BFPC CASELOAD

You will be able to work in this screen. This screen allows you to look up your BFPC caseload as well as look up a client to see which BFPC was assigned to her.

This is how the screen looks when you access it:

Clinic Services

- [-] Search
 - Simple
 - Advanced
 - BF PC Caseload**
 - BF PC Assignment
 - Investigator Family
 - Waiting List
- [-] New Family
- [-] Family/Intake
 - Certification Guide
 - Family
 - Identity
 - Contact/Address
 - Income
 - Voter Registration
 - Application
 - Participant Category
 - Comments/Alerts
- [-] Assessment
 - Visit Summary
 - Pregnancy
 - BF PC Documentation
 - Anthropometrics
 - Blood
 - Nutrition Interview
 - Risk
- [+] Certification/Termination
- [+] Education and Care
- [+] Foods

BF PC Caseload

Enter one or any combination of search fields

LA ID Clinic ID

Breastfeeding Peer Counselor

Last Name First Name

Participant

Last Name First Name

Category WIC Status

Search Results (BF PC Caseload)

BF Peer Counselor	Family ID	LA-Clinic	Person ID	Participant	Category	EDD/ADD	Ne

To search for ALL clients assigned to you:

1. Click the drop box on LA ID to access clients from our agency (51)

Enter one or any combination of search fields

LA ID Clinic ID

Breastfeeding or

2. Enter your name in the Breastfeeding Peer Counselor fields (Last Name and/or First Name)

Breastfeeding Peer Counselor

Last Name First Name

3. Click on the "Search" button

4. Result: All clients assigned to you come up:

Search Results (BF PC Caseload) 3 record(s) matched the criteria							
BF Peer Counselor	Family ID	LA-Clinic	Person ID	Participant	Category	EDD/ADD	Ne
Karina Smith	7004060	51-1	8004112	Mabel F Thompson	Breastfeeding	01/20/2016	
Karina Smith	7004156	51-1	8004289	Gladys Nite	Pregnant	08/15/2016	
Karina Smith	7004140	51-1	8004253	Errin M Andersen	Pregnant	09/27/2016	

Narrowing Your Caseload Search:

You can specify by participant category (pregnant or breastfeeding clients) and/or by WIC status (pending, active, ineligible, disqualified, terminated, or on waiting list).

Click drop box by Category:

Participant

Last Name First Name

Category WIC Status

Pregnant
Breastfeeding

Search Results (BF PC Caseload)

Click drop box by WIC Status:

Participant

Last Name First Name

Category WIC Status

Pending
Active
Ineligible
Disqualified
Terminated
Wait List

Search Results (BF PC Caseload)

BF Peer Counselor	Family ID	LA-Clinic	Participant	Category
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If you don't select something in the drop boxes, you will search for all clients with those categories or statuses. Typically, you won't specify a status since you'll want to know if results show your client is no longer active.

Make sure you enter your name in Breastfeeding Peer Counselor field; otherwise you will get info for all peer counselors.

For example:

▪ Results when just Breastfeeding Category with no BFPC name (all BF women come up):

Participant

Last Name First Name

Category Breastfeeding WIC Status

Clear Search

Search Results (BF PC Caseload) 2 record(s) matched the criteria

BF Peer Counselor	Family ID	LA-Clinic	Person ID	Participant	Category	EDD/ADD	Next Contact	Phone	WIC Status
Karina Smith	7004060	51-1	8004112	Mabel F Thompson	Breastfeeding	01/20/2016		(319) 555-8899	Pending
Tutty Mtowa	7004071	51-1	8004135	Jane E Johnson	Breastfeeding	02/05/2016		(319) 530-1111	Active

▪ Results when Breastfeeding Category and BFPC name are entered (only the BF women assigned to that PC come up):

BF PC Caseload

Enter one or any combination of search fields

LA ID 51 Clinic ID

Breastfeeding Peer Counselor

Last Name smith First Name

Participant

Last Name First Name

Category Breastfeeding WIC Status

Clear Search

Search Results (BF PC Caseload) 1 record(s) matched the criteria

BF Peer Counselor	Family ID	LA-Clinic	Person ID	Participant	Category	EDD/ADD	Next Contact	Phone	WIC Status
Karina Smith	7004060	51-1	8004112	Mabel F Thompson	Breastfeeding	01/20/2016		(319) 555-8899	Pending

To search for a specific client:

1. Specify Clinic 51 in LA ID:

Enter one or any combination of search fields

LA ID Clinic ID

Breastfeeding or

2. Enter Client's name in the Participant fields (First Name and/or Last Name):

Participant

Last Name First Name

Category WIC Status

3. Click on the "Search" button

4. Client info comes up:

Search Results (BF PC Caseload) 1 record(s) matched the criteria

BF Peer Counselor	Family ID	LA-Clinic	Person ID	Participant	Category	EDD/ADD	Ne
Tutty Mtowa	7004071	51-1	8004135	Jane E Johnson	Breastfeeding	02/05/2016	

To search for agency caseload:

1. Specify 51 in LA ID
2. Click on Search
3. Results:

Enter one or any combination of search fields

LA ID Clinic ID

Breastfeeding Peer Counselor

Last Name First Name

Participant

Last Name First Name

Category WIC Status

Search Results (BF PC Caseload) 4 record(s) matched the criteria

BF Peer Counselor	Family ID	LA-Clinic	Person ID	Participant	Category	EDD/ADD	Next Contact	Phone	WIC Status
Karina Smith	7004060	51-1	8004112	Mabel F Thompson	Breastfeeding	01/20/2016		(319) 555-8899	Pending
Tutty Mtowa	7004071	51-1	8004135	Jane E Johnson	Breastfeeding	02/05/2016		(319) 530-1111	Active
Karina Smith	7004156	51-1	8004289	Gladys Nite	Pregnant	08/15/2016		(987) 654-3210	Active
Karina Smith	7004140	51-1	8004253	Errin M Andersen	Pregnant	09/27/2016		Do Not Call	Active

Information obtained on the BFPC Caseload screen:

- Name of assigned BFPC
- Family ID (FID)
- Local agency (LA) clinic

- Person ID
- Participant Name
- Participant Category (pregnant or breastfeeding)
- Expected due date
- Next BFPC contact date
- Phone number
- WIC status
- Zip code

Search Results (BF PC Caseload)

BF Peer Counselor	Family ID	LA-Clinic	Person ID	Participant	Category	EDD/ADD	Next Contact	Phone	WIC Status	ZIP
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For example:

Search Results (BF PC Caseload) 4 record(s) matched the criteria

BF Peer Counselor	Family ID	LA-Clinic	Person ID	Participant	Category	EDD/ADD	Next Contact	Phone	WIC Status
Karna Smith	2004260	51-1	0004112	Mabel F Thompson	Breastfeeding	01/20/2016		(319) 555-0899	Pending

FAMILY INTAKE PANEL

- New Family
- [-] Family/Intake
 - Certification Guide
 - Family
 - Identity
 - Contact/Address
 - Income
 - Voter Registration
 - Application
 - Participant Category
 - Comments/Alerts

FAMILY

You will have read-only rights for this screen (screen shot below). Information useful for BFPCs on this screen:

- Participant name
- Parent/Guardian name
- Yellow color indicates parent/guardian

- Salmon color indicates infant/child
- Gray color indicates ineligible, pending, and terminated
- Date of birth
- Participant category (e.g. BF, not BF, partially BF, infant, pregnant, child)
- WIC status (e.g. active, pending, terminated, ineligible)
- Certification end date
- HR – high risk
- What goal they determined for themselves or child and date this was made (found below date of birth)
- How many months of food benefits (FB Issuance) – (e.g. 3, 2 or 1 month; or none)
- Mother’s preferred spoken language (several options)
- Mother’s preferred printout language (only English or Spanish options)

Also, note on this and all screens you will always see any family alerts.

Clinic Services

- Search
 - Simple
 - Advanced
 - BF PC Caseload
 - BF PC Assignment
 - Investigator Family
 - Waiting List
- New Family
 - Family/Intake
 - Certification Guide
 - Family**
 - Identity
 - Contact/Address
 - Income
 - Voter Registration
 - Application
 - Participant Category
 - Comments/Alerts
 - Assessment
 - Certification/Termination
 - Education and Care
 - Foods
 - Activity

Family

P/G: Jane E Johnson	Category: Breastfeeding	HR	Edit
Date of Birth: 02/01/1990 (26 y)	WIC Status: Active	Cert. End: 02/2017	Last FB:
2/24/2016, Eat more Fe-rich foods and cont PNV daily.		*FB Issuance	3 Months
Participant: Brad Johnson	Category: Infant (Male)	Part BF	BW Edit
Date of Birth: 02/05/2016 (1 m 18 d)	WIC Status: Active	Cert. End: 02/2017	Last FB:
2/24/2016, Increase amount of BF each day		*FB Issuance	3 Months

Family Data

[New Member / Proxy](#)

*Mother's Ed Level: 12th grade | *Printouts Language: English | BF PC: [dropdown]

Needs Interpreter: | Preferred Spoken Language: [dropdown]

Economic Unit: Jane E Johnson | EU Nbr: 8004135 | Current PAN: | Status:

*Referred To WIC By: Family/Friend

System | Messages | **Family Alerts**

Brad Johnson

- 10006 - Is the Infant still breastfeeding?
- Charles Dufano - wants formula

Jane E Johnson

- Charles Dufano - jane says she's moving next month to chicago.

Family

P/G: Jane E Johnson	Category: Breastfeeding	HR	Edit
Date of Birth: 02/01/1990 (26 y)	WIC Status: Active	Cert. End: 02/2017	Last FB:
2/24/2016, Eat more Fe-rich foods and cont PNV daily.		*FB Issuance	3 Months
Participant: Brad Johnson	Category: Infant (Male)	Part BF	BW Edit
Date of Birth: 02/05/2016 (1 m 20 d)	WIC Status: Active	Cert. End: 02/2017	Last FB:
2/24/2016, Increase amount of BF each day		*FB Issuance	3 Months

Switching between family members:

You access each family member by clicking on the drop box arrow of the Participant field toward the top of the screen and then click on the appropriate name of the family member. You can do this on multiple Focus screens.



51 - 1 Connected

Card Activities Help

7004071 Jane E Johnson 51 - 1 Iowa City

Participant Jane E Johnson

Category: Breastfeeding

Date of Birth: 02/01/1990 (26 y) WIC Status: Active

IDENTITY

You will have read-only rights to this screen (screenshot below). Information on this screen includes what proof of identification was shown for mother and infant as well as all other programs in which the participant is involved.

Participant Jane E Johnson

Category: Breastfeeding HR

Date of Birth: 02/01/1990 (26 y) WIC Status: Active Cert. End: 02/2017 Last FB:

Identity

Record Dates 02/24/2016

Signature

Proof Of Identity Driver's License

ID Affidavit Reason

Physically Present Yes

Reason

Confirmation Date

Other Program Participation

- SNAP (Food Stamps)
- Head Start or Early Head Start
- Family Investment Program (FIP)
- Child Health
- Maternal Health
- ISMILE
- Early Access
- Food Bank or Food Pantry
- School Lunch Program

CONTACT/ADDRESS

You will have read-only rights for this screen (screenshot below). Information useful for BFPCs on this screen:

- Phone numbers (main and alternative)
- Alternative phone owner
- E-mail address
- Address (note physical address on left side; mailing address on right side if different)
- If client is homeless, migrant or refugee (checkbox above physical address)

Clinic Services

- Search
 - Simple
 - Advanced
 - BF PC Caseload
 - BF PC Assignment
 - Investigator Family
 - Waiting List
- New Family
 - Family/Intake
 - Certification Guide
 - Family
 - Identity
 - Contact/Address
 - Income
 - Voter Registration
 - Application
 - Participant Category
 - Comments/Alerts
 - Assessment
 - Certification/Termination
 - Education and Care
 - Foods
 - Activity

Contact/Address

Home Phone Number (319) 530-1111
 Alternate Phone Number () - - -
 Alternate Phone Owner
 E-mail Address Jane@hotmail.com

Privacy Information
 Do Not Call
 Do Not Send Mail

Record Dates 02/24/2016 1 of 1 New Edit Delete

Signature Proof of Residency Driver's License, current address Affidavit Reason

Physical Address **Mailing Address (if different than Physical)**

Eff Date 02/24/2016 1 of 1 Eff Date 0 of 0

End Date:
 Homeless Migrant Refugee

Address Line 1 100 Main Street
 Address Line 2
 Apt/Suite
 P.O. Box
 City Iowa City
 State Iowa
 ZIP Code 52240 (+4)
 County Johnson

Add End Date End Date:
 Address Line 1
 Address Line 2
 Apt/Suite
 P.O. Box
 City
 State
 ZIP Code (+4)
 County

System Messages Family Alerts

Brad Johnson

- 10006 - Is the Infant still breastfeeding?
- Charles Dufano - wants formula

Jane E Johnson

- Charles Dufano - jane says she's moving next month to chicago.

(close up of Contact information)

Contact/Address

Home Phone Number (319) 530-1111
 Alternate Phone Number () - - -
 Alternate Phone Owner
 E-mail Address Jane@hotmail.com

Privacy Information
 Do Not Call
 Do Not Send Mail

Record Dates 02/24/2016 1 of 1 New Edit Delete

Signature Proof of Residency Driver's License, current address Affidavit Reason

Physical Address **Mailing Address (if different than Physical)**

Eff Date 02/24/2016 1 of 1 Eff Date 0 of 0

End Date:
 Homeless Migrant Refugee

Address Line 1 100 Main Street
 Address Line 2
 Apt/Suite
 P.O. Box
 City Iowa City
 State Iowa
 ZIP Code 52240 (+4)
 County Johnson

Add End Date End Date:
 Address Line 1
 Address Line 2
 Apt/Suite
 P.O. Box
 City
 State
 ZIP Code (+4)
 County

PARTICIPANT CATEGORY

You will have read-only access to this screen (screenshot below). Information useful to BFPCs includes: current participant category, history of participant categories, miscarriage.

Participant Category

Record Dates 02/23/2016 1 of 1 + New

Check Category Eligibility

Participant Category Breastfeeding

Miscarriage

Participant Category		
Date	Participant Category	Staff Person
02/23/2016	Breastfeeding	Charles Dufano

COMMENTS/ALERTS

You will be able to create comments and alerts. Comments do not show up at the bottom of the screen; alerts always do. Comments have no expiration date; alerts have an expiration date. You will usually create alerts in the record.

1. Click on “New”

Comments/Alerts

Record Dates 02/24/2016 1 of 2 + New Edit Delete

2. Check box “Display as Alert” (see screenshot below). Your name will appear in the Staff Member field. The Expiration Date and Comment fields will be red since they are required fields (see below).

Also, note in the screenshot below at the bottom of the screen the red circle with a white X followed by a directive statement, “Comment is a required field.” Focus will always tell you any required fields at the bottom of all screens you are able to work in. If you do not complete required fields you will not be able to save your work or move to another screen. ALWAYS SAVE YOUR WORK.

Comments/Alerts

Record Dates: 03/23/2016 | 3 of 3 | New Edit Delete

*Staff Member: Charles Dufano

Display as Alert:

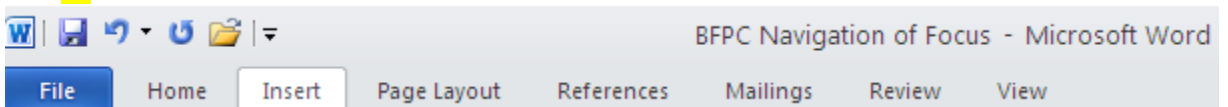
*Expiration Date: 07/01/2016

*Comment:

System Messages Family Alerts

Error Code	Description
9001	Comment is a required field.

3. Click on the Save icon at the top of the screen.



4. The boxes become gray.

Clinic Services Participant: Brad Johnson | 2 of 2

Category: Infant (Male) Part BF WIC Status: Active Cert. End: 02/2017 Last FB:

Date of Birth: 02/05/2016 (1 m 18 d)

Comments/Alerts

Record Dates: 02/24/2016 | 1 of 2 | New Edit Delete

Staff Member: Charles Dufano

Display as Alert:

Expiration Date: 06/03/2016

Comment: wants formula

Charles Dufano 02/24/2016

System Messages Family Alerts

Brad Johnson

- 10006 - Is the Infant still breastfeeding?
- Charles Dufano - wants formula

Jane E Johnson

- Charles Dufano - iane says she's moving next month to chicago.

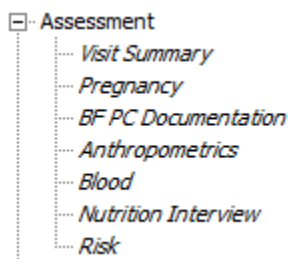
Edit or Delete a Comment or Alert

This is done by clicking on the appropriate button to the right of “New”.



Note: These three buttons (New, Edit, and Delete) are available on other screens as well.

ASSESSMENT PANEL



VISIT SUMMARY

You will have read-only rights for this screen (screenshot below). Information useful for BFPCs on this screen:

- WIC appointment type
- Age
- Certification start/stop dates
- Weight
- Height or length
- Hemoglobin
- Type of food package issued
- Risks assessed by nurse and dietitian
- Referrals made by nurse and dietitian
- Nutrition Education Topics offered to client during appointment

Visit Summary

Record Date 02/24/2016 1 of 1

Print

<p>Participant Data</p> <p>Appointment Type: Certification</p> <p>Medical Assistance ID: J111111</p> <p>Age on Record Date: 26 y</p>	<p>Assessment Data</p> <p>Height: 65 in</p> <p>Weight: 160 Lbs</p> <p>Current BMI: NA</p> <p>Weight for Age: NA</p> <p>Stature for Age: NA</p> <p>Weight for Height: NA</p> <p>Hemoglobin: 10.00</p>
<p>Certification Data</p> <p>Certification Start Date: 02/24/2016</p> <p>Certification End Date: 02/28/2017</p> <p>Certification Category: NA</p>	
<p>Foods Data</p> <p>Food Package Issued: Tailored Not BF OR Part BF Out...</p>	
<p>Risks</p> <p>201 - Low Hemoglobin / Low Hematocrit</p> <p>303 - History of Gestational Diabetes</p> <p>355 - Lactose Intolerance</p>	
<p>Participant Referrals</p> <p>Planned Parenthood of Greater Iowa 51 56</p>	
<p>NE Topics Covered</p> <p>Anemia : Anemia - Ways to increase iron in the diet</p> <p>Breastfeeding: Breastfeeding basics - Milk supply</p> <p>Tobacco cessation: Smoking cessation - Risks for infants and children</p>	

PREGNANCY

You will have read-only rights for this screen (screenshot below). Information useful for BFPCs on this screen:

- Expected delivery date
- Last menstrual period date
- Number of weeks gestation
- Pre-pregnancy weight and BMI
- Number of expected babies/multigestational
- Actual delivery date
- Weight gain for pregnancy
- Pregnancy terminated with no live birth
- Number of live infants from pregnancy

Pregnancy

Record Dates 02/24/2016 1 of 1 New Edit

Infant(s) Born From This Pregnancy

Add	Brad Johnson
Remove	

English Metric

Prenatal

Expected Delivery Date: [/ /]

Last Menstrual Period: [/ /]

Weeks Gestation: NA

Pre-Pregnancy Weight: [] lbs

Pre-Pregnancy BMI: []

Multifetal Gestation # of Expected Babies

Postpartum

Actual Delivery Date: 02/05/2016

Weight Gained This Pregnancy: 20 lbs

Pregnancy Termination with No Live Birth (321c)

1 # of Live Infants From This Pregnancy

BFPC DOCUMENTATION

You will be able to enter BFPC documentation. Note: YOU ARE ONLY ABLE TO ENTER BFPC DOCUMENTATION IN THE MOTHER'S RECORD; you will not be able to enter information in this screen in the infant's record.

- BF PC Assignment
- Investigator Family
- Waiting List
- New Family
- Family/Intake
 - Certification Guide
 - Family
 - Identity
 - Contact/Address
 - Income
 - Voter Registration
 - Application
 - Participant Category
 - Comments/Alerts
- Assessment
 - Visit Summary
 - Pregnancy
 - BF PC Documentation**
 - Anthropometrics
 - Blood
 - Nutrition Interview
 - Risk
- Certification/Termination
 - Certification
- Education and Care
 - Referrals - Participant
 - Referrals - Family
 - Nutrition Education
 - Care Plan - Participant
 - Care Plan - Family

Date of Birth: 02/05/2016 (1 m 18 d) WIC Status: Active Cert. End: 02/2017 Last FB:

BF PC Documentation

Pregnancy Record Date: [/ /] of 0 of 0

Record Date: [/ /] of 0 of 0 New Edit Delete

Contact Date: [/ /] Next Contact Date: [/ /]

Peer Counselor: [] Date Exited BF PC Program: [/ /]

Summary Type of Contact: []

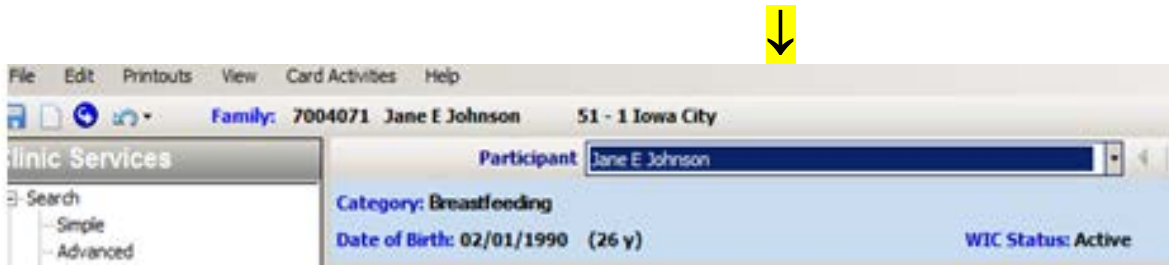
Prenatal Topics

Postpartum Topics

Notes: []

To enter BFPC documentation:

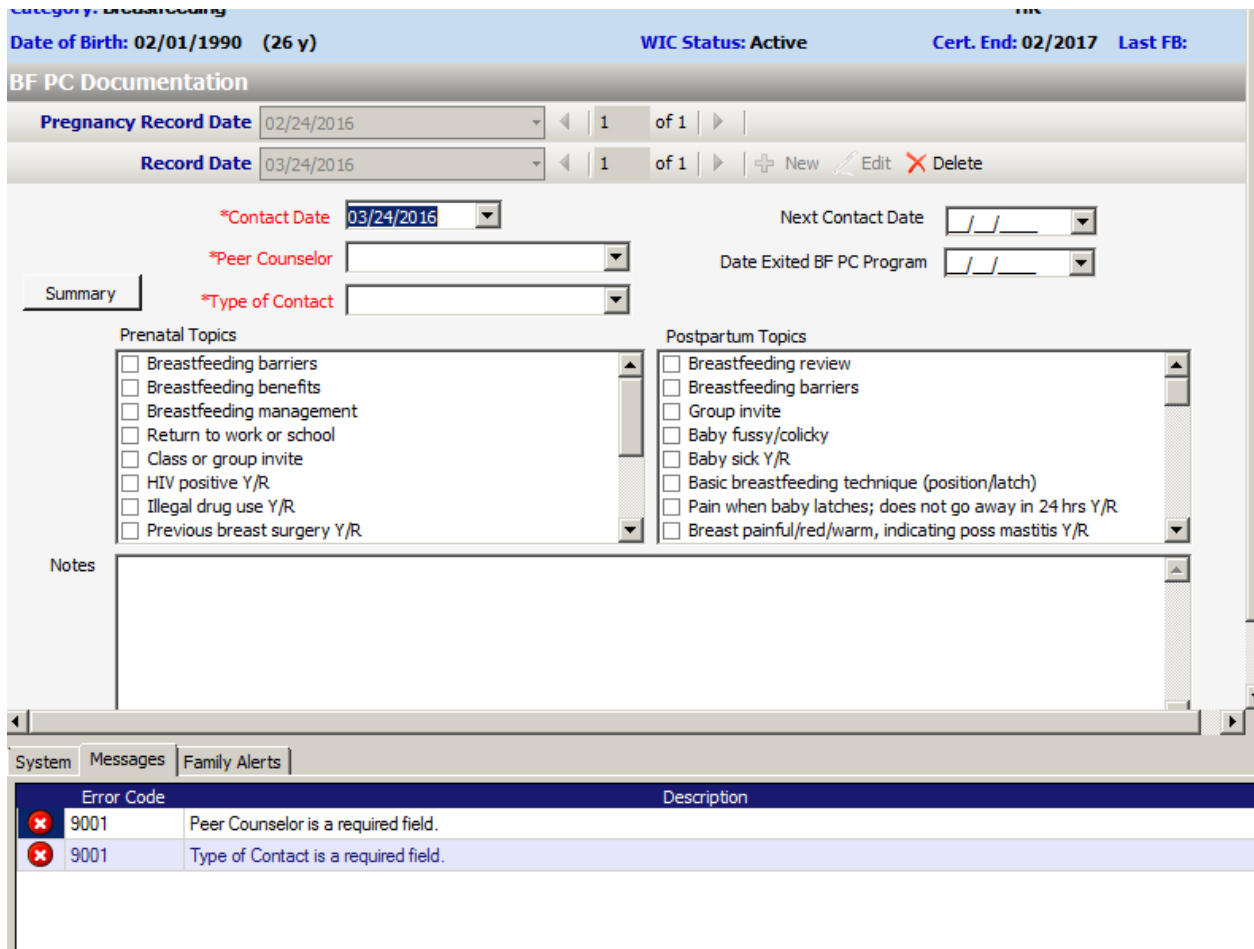
1. Make sure you are in mother's record (look at the name in the Participant field).



2. Click on "New"



3. Required fields of Contact Date, Peer Counselor name, and Type of Contact will be in red. Notice that required information also is listed at the bottom of the screen (red dot, white X)



4. Contact date will automatically fill in with today's date. If your contact was a different date than today, click on the date field and re-enter the correct date of contact. You can also click on the drop box arrow and use the calendar to do this (see example in # 10)

below). Always record the correct contact date. The date you entered data is the Record Date (above Contact Date) and this date cannot be changed.

5. Fill in your name by clicking on the drop box arrow in the Peer Counselor field and click on your name.
6. Fill in Type of Contact by clicking on the drop box arrow in the Type of Contact field and click on the appropriate contact. Options include:
 - No answer (includes no voicemail set up; disconnected; wrong number – specify in Notes)
 - Clinic visit (you saw them at the WIC clinic)
 - Home visit (we don't do these)
 - Hospital visit
 - Telephone support (include text – specify in Notes)
 - Peer support group (include BF class contacts)
 - Mailing (include postal and e-mail – specify in Notes)
 - Other (include meeting in a public place – specify in Notes)

*Contact Date 03/24/2016

*Peer Counselor

*Type of Contact

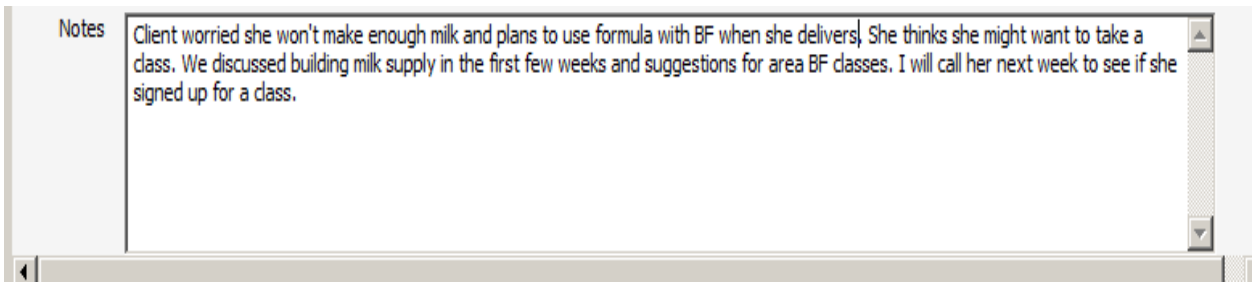
Topics

<input type="checkbox"/> Breastfeeding barriers	No Answer
<input type="checkbox"/> Breastfeeding benefits	Clinic visit
<input type="checkbox"/> Breastfeeding management	Home visit
<input type="checkbox"/> Return to work or school	Hospital visit
<input type="checkbox"/> Class or group invite	Telephone support
<input type="checkbox"/> HIV positive Y/R	Peer Support Group
<input type="checkbox"/> Illegal drug use Y/R	Mailing
<input type="checkbox"/> Previous breast surgery Y/R	Other

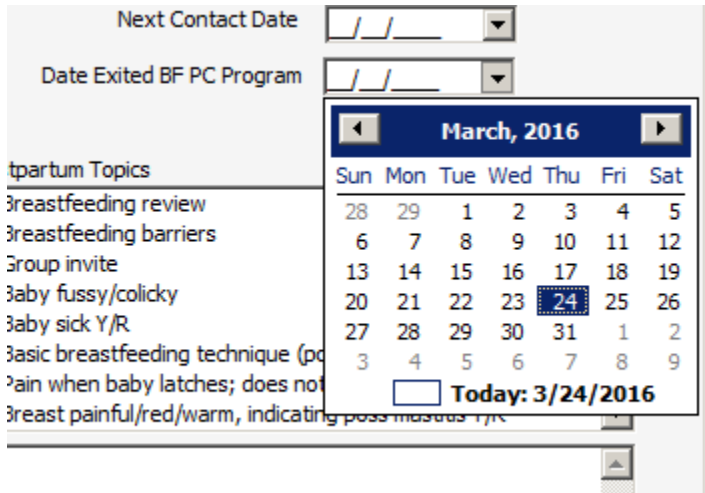
7. Click on all the topics discussed during this contact. Enter prenatal topics in the left column and postpartum topics in the right column.

Prenatal Topics	Postpartum Topics
<input type="checkbox"/> Breastfeeding barriers	<input type="checkbox"/> Breastfeeding review
<input checked="" type="checkbox"/> Breastfeeding benefits	<input type="checkbox"/> Breastfeeding barriers
<input type="checkbox"/> Breastfeeding management	<input type="checkbox"/> Group invite
<input checked="" type="checkbox"/> Return to work or school	<input type="checkbox"/> Baby fussy/colicky
<input checked="" type="checkbox"/> Class or group invite	<input type="checkbox"/> Baby sick Y/R
<input type="checkbox"/> HIV positive Y/R	<input type="checkbox"/> Basic breastfeeding technique (position/latch)
<input type="checkbox"/> Illegal drug use Y/R	<input type="checkbox"/> Pain when baby latches; does not go away in 24 hrs Y/R
<input type="checkbox"/> Previous breast surgery Y/R	<input type="checkbox"/> Breast painful/red/warm, indicating poss mastitis Y/R

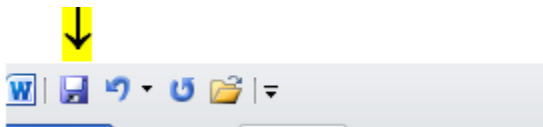
8. Write a short narrative about to further elaborate or clarify your session with the client. You need not be excessive, but your documentation should allow you, another BFPC, dietitian, or nurse to know what you discussed and be able to continue education/support with this client. You should also indicate why you are unable to reach a client if you've made an attempt.



9. Enter the date you plan to contact the client again by filling in the Next Contact Date field. You can do this manually by clicking on the far left side of the field and entering the date (MM/DD/YYYY) or click on the drop box and use the calendar to find the date (use left/right arrows by the name of the month maneuver month).
10. If client has discontinued the BFPC Program, enter the date in the Date Exited BF PC Program (use the same method as entering the Next Contact Date). Record reason for discontinuing the program in the Notes section.



11. Always click on Save when completing this (and any) screen.



12. You can also view a summary of your BFPC documentation. Click on the “Summary” button to the left of Contact Date, Peer Counselor and Type of Contact.

*Contact Date

*Peer Counselor

*Type of Contact

Prenatal Topics

Below is a screenshot of the BFPC Documentation Summary:

Date: 03/24/2016
 Name: Jane E Johnson
 Category: Breastfeeding
 LA-Clinic: 51-1 Family ID: 7004071 ADD: 02/05/2016
 Age: 26 y Phone #: (319) 530-1111
 Address: 100 Main Street, Iowa City, IA 52240

Infant's Name: Brad Johnson DOB: 02/05/2016
 Weeks Gestation: 40 Birth Weight: 7 - 8 Lbs/Oz

BF Equipment: NA

Contact Date: 03/24/2016 BF PC: NA
 Contact Type: NA
 Infant Current Age: 1 m 19 d
 Infant Current Weight: 9 - 1 Lbs/Oz
 Content Topics: NA
 Notes: NA

NUTRITION INTERVIEW

You will have read-only rights for this screen (screenshot below). It is easiest to view "Current Summary". Information useful for BFPCs on mother's screen:

- Breastfeeding support
 - BF complications, success, pumping, attending school/work; support

- Health/medical
 - Name of doctor; health concerns, medical conditions, pregnancy history, oral health concerns
- Nutrition practices
 - Eating/drinking habits; food preparation concerns, prenatal vitamins BF status and when formula/other foods began (infant screen)
- Lifestyle
 - Smoking history; alcohol history; plans to return to pre-pregnancy weight
- Social environment
 - Abuse/neglect concerns; stress; family planning

Additional information on infant's screen:

- Immunizations
 - Specifically DTaP
- Oral Health
 - Questions mom has about caring for gums/teeth; oral health conditions
- Mom's Participation in WIC
 - Did she receive WIC or would she have qualified

(Screenshots of the Nutrition Interview screens are below)

Date of Birth: 02/01/1990 (26 y) **WIC Status:** Active **Cert. End:** 02/2017 **Last FB:**

Nutrition Interview

Record Dates: 02/24/2016 1 of 1 + New Edit Delete

Health Care Provider: Dr. Oz No Health Care Provider

Do you give WIC permission to share Jane's WIC information with this health care provider? Yes No

Current Summary

Breastfeeding Support

1a. How is it being a new mom?
Listen, ask, and assess for

- Postpartum depression
- Struggles
- Successes
- Caregiver ability

361 - Depression

902 - Limited Ability to make feeding decisions - woman or primary caregiver

1h. How is breastfeeding going for you?
Starters/Prompts

Client likes being a new mom, but it can get overwhelming with everything baby needs, housework and school.

02/24/2016

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Current Summary

602 - Breastfeeding Complications

- 602a - BF Complications - severe breast engorgement
- 602b - BF Complications - recurrent plugged ducts
- 602c - BF Complications - mastitis
- 602d - BF Complications - flat or inverted nipples causing latch problems
- 602e - BF Complications - cracked, bleeding or severely sore nipples
- 602g - BF Complications - failure of milk to come in by 4 days postpartum
- 602h - BF Complications - tandem nursing 2 siblings who are not twins

1c. How long are you planning to breastfeed your infant?
Listen, ask, and assess for

Not sure; would like to continue when goes

Do you give WIC permission to share Jane's WIC information with this health care provider?

Yes No

Current Summary

Listen, ask, and assess for

- Returning to work/school
- Pumping
- Storage
- Continuation of BF
- Anticipated or current separation from infant

Not sure; would like to continue when goes back to school full-time.

1d. Are you currently employed or attending school >10 hours/week?

Yes No

1e. What type of support do you have for breastfeeding?

Listen, ask, and assess for

- Partner/spouse
- Other family members

Husband is supportive.

Health/Medical

2b. What concerns do you or your doctor have about your health?

Listen, ask, and assess for

- Medical conditions
- Family planning

No concerns. Client wonders if she's lactose intolerant because she gets a stomach ache after drinking milk.

2c. Any medical conditions, illness, or special needs?

Conditions No Conditions

Medical Conditions

- 347 - Cancer
- 354 - Celiac Disease
- 348 - Central Nervous System Disorders
- 363 - Pre-Diabetes

Current Summary

2e. Was this your first pregnancy?

Yes No

(Not including most recent pregnancy)

- # of previous pregnancies
- # of live births
- # of pregnancies past 20 weeks/5 months

2f. Did you have any complications or special conditions with this pregnancy?

Yes No

- 303 - History of Gestational Diabetes
- 304 - History of Preeclampsia

Current Summary

living infants

2g. Do you ever have a hard time chewing or eating certain foods?

Listen, ask, and assess for

- Routine oral health care
- Referral needed
- Tooth decay
- Tooth loss
- Impaired ability to eat
- Gingivitis

Sometimes it hurts to eat hard foods.

381 - Oral Health Conditions

Nutrition Practices

Do you give your permission to share Jane's WIC information with this health care provider?

Yes No

Current Summary

Nutrition Practices

3a. Tell me what you like to eat and drink.

Listen, ask, and assess for

- Drink to thirst
- Appetite
- Timing of meals
- Meals, snacks, beverages
- Eating pattern
- Frequency
- Eating problems
- Food preparation
- Food likes and dislikes

Eats 3 meals a day; doesn't like milk because it makes her sick; trying to lose weight.

Current Summary

3c. Is there anything you would like to eat more or less of?

3d. Do you take any vitamins, minerals, herbs or dietary supplements?

Listen, ask, and assess for

- Adequate folic acid intake

takes PNV

427 - Nutrition Practices

427a - Dietary Supplements with Potentially Harmful Consequences

427b - Consuming a Diet Very Low in Calories and/or Essential Nutrients

427c - Compulsively Ingesting Non-Food Items (Pica)

427d - Inadequate Vitamin/Mineral Supplementation

Current Summary

3e. Do you have problems with food preparation and/or storage?

Listen, ask, and assess for

- Refrigeration
- Cooking equipment
- Adequate food
- Family table
- Safe water

Life Style

Past Smoking

4a. In the 3 months before you were pregnant, how many cigarettes did you smoke on an average day?
(1 pack = 20 cigarettes)

Cigarettes/day

No problems. Family never eats at the table.

Current Summary

Past Smoking

4a. In the 3 months before you were pregnant, how many cigarettes did you smoke on an average day?
(1 pack = 20 cigarettes)

Cigarettes/day

4b. In the last 3 months of your pregnancy, how many cigarettes did you smoke on an average day?
(1 pack = 20 cigarettes)

Cigarettes/day

Current Smoking

4c. How many cigarettes do you smoke on an average day now?

Cigarettes/day

4d. Does anyone else in your household smoke inside the home?

Yes No

Past Alcohol Use

4e. In the 3 months before you were pregnant, how many alcoholic drinks (beer, wine or liquor) did you have in an average week?

Drinks/wk

4f. In the last 3 months of your pregnancy, how many alcoholic drinks (beer, wine or liquor) did you have in an average week?

Drinks/wk

Current Alcohol Use

4g. Do you currently drink alcohol?

Yes No

If yes, how much and how often?

Drinks/Week

4i. What are your plans for returning to your pre-pregnancy shape?

Listen, ask, and assess for

- Physical activities
- Walking
- Playing with children
- Safe parks
- Access to fitness centers
- Activity frequency
- Food consumption changes

Social Environment

5a. What else can I help you with?

Walking

Social Environment

5a. What else can I help you with?
Listen, ask, and assess for

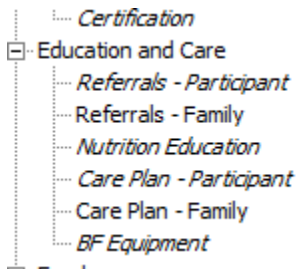
- Abuse/neglect in the last 6 months
- Limited ability to make appropriate feeding decisions or prepare foods
- Family planning

901 - Recipient of Abuse - within past 6 months

902 - Limited Ability to make feeding decisions - woman or primary caregiver

Use to have a boyfriend that was abusive; hasn't seen him in 2 years, but worried that he will come back.

EDUCATION AND CARE PANEL



REFERRAL – PARTICIPANT

You will be able to create referrals for your clients and view referrals made by WIC staff and other BFPCs.

When you click on the Referrals-Participant branch, all referrals made to the client are displayed (see screenshot below).

Participant: Jane E Johnson | 1 of 2

Category: Breastfeeding | HR

Date of Birth: 02/01/1990 (26 y) | WIC Status: Active | Cert. End: 02/2017 | Last FB:

Referrals - Participant

Referred To - Participant Referrals from WIC					
	Date	Organization Type	Organization	Staff Member	Follow-up
▶	02/24/2016	hawk-I/Medicaid		Charles Dufano	
	02/24/2016	Physician		Charles Dufano	
	02/24/2016	Lactation consultant		Charles Dufano	
	02/24/2016	Family Planning	Planned Parenthood of Greater I...	Charles Dufano	
	02/24/2016	Smoking Cessation		Charles Dufano	

To make a referral:

1. Click on the “Add Row” button.

2. Today's date will automatically fill in the date field.
3. Click on the drop box arrow for the "Organization Type" and select the appropriate option.

Date of Birth: 02/05/2016 (1 m 16 d) WIC Status: Act

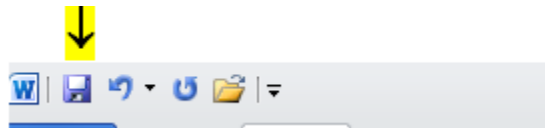
Referrals - Participant

Referred To - Participant Referrals from WIC		
Date	Organization Type	Organization
02/29/2016	Child Care R & R	
02/24/2016	Physician	
03/23/2016	<input type="text"/>	

Add Row
 Remove Row
 Signature
 Print

Breastfeeding Peer Couns
 Child Care R & R
 Child Health
 Child Health Spec Clinic
 Child protection agency
 Community Action Prograr
 Community Health Center
 Dentist
 Development/Education
 Domestic Violence
 Early Access/AEA
 EFNEP
 Family Planning
 Food Pantry
 Food Stamps
 hawk-I/Medicaid
 Head Start/Early HS
 Home Visits
 HOPES
 Immunizations
 Lactation consultant
 Lead Screening
 Maternal Health
 Other Services
 Parenting Group
 Physician
 Resource Center
 Smoking Cessation
 Storks Nest

4. Click on the drop box arrow for the "Organization" field and select the appropriate option. (Note: If no options appear, you can leave the field blank).
5. Click on the Save icon.



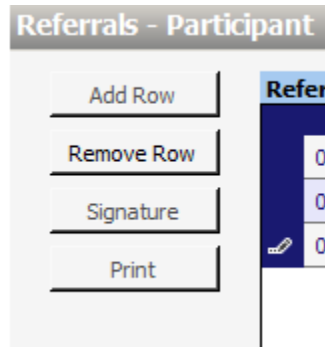
To document when you follow-up with a client:

Click on the drop box arrow for the "Follow-up" and select the appropriate option.

Staff Member	Follow-up
Charles Dufano	
Charles Dufano	Rcvd Services
Charles Dufano	Barriers
	Has Appt
	No interest
	No contact

To delete a referral:

1. Click on the Date field of the referral you want to remove.
2. Click on the “Remove Row” button.



Obtaining a signature for referral:

You may on occasion wish to get the client to sign for a referral if you believe it is important that she follows through with your referral. For example, if your client has symptoms of mastitis and you refer to her physician, you may want to get the client’s signature to prove you made this referral in case she doesn’t actually go and there are further complications. **YOU CAN ONLY OBTAIN SIGNATURES IF YOU ARE USING A STATE-ISSUED COMPUTER WITH A SIGNATURE PAD.**

1. Click on the “Signature” button
2. Client signs the signature pad with stylus and clicks “OK” on the signature pad.
3. Click on the drop box arrow and then select the client’s name
4. Click on drop box arrow and then select proof of client identification (e.g. driver’s license)

NUTRITION EDUCATION

You will have read-only rights for this screen (screenshot below). It is easiest to view “Current Summary”. Information useful for BFPCs on this screen:

- Nutrition education covered
- Pamphlets provided
- Number of nutrition education contacts completed during the current certification period

Participant Jane E Johnson 1 of 2

Category: Breastfeeding HR

Date of Birth: 02/01/1990 (26 y) WIC Status: Active Cert. End: 02/2017 Last FB:

Nutrition Education

Record Date 2/24/2016 1 of 1 + New Edit Delete

Copy High Risk Follow Up Appointment

Contacts Information

Nutrition Education Contacts This Certification Period: 1

Refused Nutrition Education Class

View Current View All

Nutrition Education Covered

- Anemia
- Breastfeeding
- Child nutrition
- Dietary supplements
- Elimination patterns
- Food resources
- Food safety & sanitation
- Formula-feeding
- Infant nutrition
- MyPlate

Pamphlets Provided

- Anemia
- Breastfeeding
- Child nutrition
- Dietary supplements
- Elimination patterns
- Food resources
- Food safety & sanitation
- Formula-feeding
- Infant nutrition

CARE PLAN – PARTICIPANT

You will have read-only rights for this screen (screenshot below). Care Plans are created by dietitians and nurses. All the information that was entered into text boxes in the Nutrition Interview transfer to gray text boxes in the Care Plan. The dietitian and nurse may have added additional information in the white space below the gray boxes in the Care Plan.

Remember, you can switch between the mother's and infant's Care Plans by clicking on the drop box arrow of the Participant field and selecting the appropriate client:

Participant Jane E Johnson

Category: Breastfeeding

You can view past Care Plans by clicking on the drop box arrow of the Record Date field and selecting the appropriate date:

Date of Birth: 02/05/2016 (1 m 18 d) WIC Status: Active

Care Plan - Participant

Record Date 2/24/2016 1 of 1 + New

Information useful for BFPCs on the Care Plan - Participant screen:

- Subjective information
 - This includes things that the client says about herself or that she says about her infant
- Objective information
 - This includes anything measurable, e.g. age, weight, height, length, BMI, hemoglobin, BF status
- Assessment
 - This is the dietitian's or nurse's interpretation of the subjective and objective data.
- Topics discussed
- Pamphlets provided
- Goal
 - Every client is required to have at least one goal that they set for themselves. There may be up to three goals. (Note: Goals are also copied to the Family screen and listed under the client's date of birth).
- Counseling/Education provided
 - This section elaborates upon the nutrition topics listed to further describe what was discussed with the client and may include the client's reaction.
- Plan
 - This section describes plans for future education, support, follow-up, review, or ongoing activities.

Date of Birth: 02/05/2016 (1 m 18 d) WIC Status: Active Cert. End: 02/2017 Last FB:

Care Plan - Participant

Record Date 2/24/2016 1 of 1 + New Edit Delete

Print Staff Member: Charles Dufano Expand All History

Links
Copy Goals

Subjective

02/24/2016, Charles Dufano, From Nutrition Interview:
 He eats all the time -- at least every 2 hours.
 Mother thinks he needs more than what her breasts provide, so she gives some formula especially at night.
 Brad has 8 wet diapers a day; 1 stool.
 He doesn't have any problems taking formula; he seems to enjoy breastfeeding.
 He cried a lot and mother said her milk didn't seem to come in right away. Formula seems to helping making make baby happy now. Mom adds extra powder to formula bottles so it's as good as breastmilk.
 None
 None
 Sleeps and eats

Objective Assessment

Care Plan - Participant

Record Date 2/24/2016 1 of 1 + New Edit X Delete

Print Staff Member: Charles Dufano Expand All History

Links
Copy Goals

Objective

Age: 0 m 19 d
Adjusted Gestational Age: NA
Breastfeeding Status: Part BF
Length: 20 - 1/2 inches Measurement Date: 02/24/2016
Weight: 9 - 1 lbs/Oz Measurement Date: 02/24/2016
Weight for Length Percentile: 82.8 Percentile
Weight for Age Percentile: 54.4 Percentile
Length for Age Percentile: 33.2 Percentile

Assessment

411F - Dilution of Formula Inappropriate
701 - Infant up to 6 mos old of WIC mother or WIC eligible mother
702A - BF Infant of Mother at Nutr Risk Priority 1

Infant appears to be doing well with BF; formula is underdiluted.
Mother insistent upon getting formula from WIC.

Print Staff Member: Charles Dufano Expand All History

Links
Copy Goals

Counseling/Plan

Topics

Breastfeeding: Breastfeeding basics-Feeding cues
Breastfeeding: Breastfeeding basics-Involving dad/grandma
Breastfeeding: Breastfeeding basics-Milk supply

Pamphlets

Breastfeeding - 10 Tips for Dads to help support breastfeeding mom
Breastfeeding - Breastfeeding Basics: The early weeks

Goals

Goal 1 Increase amount of BF each day
Goal 2
Goal 3

Referrals

Counseling/Education

Discussed building milk supply; use formula only when needed and proper formula prep. Mother agreeable to BF peer counselor.

Counseling/Education

Discussed building milk supply; use formula only when needed and proper formula prep. Mother agreeable to BF peer counselor.

Plan

BF peer counselor (Tutty) to contact client for BF support/ed f/u WIC clinic for infant feeding; BF support; need for pump

BF EQUIPMENT

You will have read-only rights for this screen (screenshot below). This screen will inform you if a client has a pump issued from our agency.

The screenshot shows a web application interface for 'BF Equipment'. On the left is a vertical navigation menu with categories like 'Advanced', 'New Family', 'Assessment', and 'Foods'. The main area is titled 'BF Equipment' and contains several sections: 'Pregnancy Record Dates' (showing 0 of 0), 'Record Dates' (showing 0 of 0 with New, Edit, Delete buttons), 'Serialized Inventory Issuance' (with fields for Category, Type, Serial Number, Rental Company, Contact/Return Date, and Reason), 'Non - Serialized Items' (a table with headers Category and Item), 'Documentation' (with fields for Proof of Identity, Contact 1, Contact 2, Contact 3), and 'Serialized Inventory Item Disposition' (with fields for Reason, Date, and Comment). There are also 'Add Row' and 'Remove Row' buttons.

(Close up of BF Equipment information)

This is a close-up of the 'BF Equipment' form. At the top, it shows 'Date of birth: 02/01/1990 (26 y)', 'WIC Status: Active', and 'Cert. End: 02/2017'. The 'Pregnancy Record Dates' section shows '02/24/2016' and '1 of 1'. The 'Serialized Inventory Issuance' section has dropdown menus for Category, Type, Serial Number, Rental Company, and Reason, and a date field for Contact / Return Date. The 'Non - Serialized Items' table is empty. The 'Documentation' section has dropdowns for Proof of Identity and text boxes for Contact 1 and Contact 2. At the bottom, there are tabs for 'System', 'Messages', and 'Family Alerts'.

ACTIVITY PANEL

- Foods
- Activity
 - Appointment History
 - Transfer Family
 - Retrieve Participant
 - Survey
 - Customer Service Log
 - Participant Violations
 - Admin Hearing

APPOINTMENT HISTORY

You will have read-only rights for this screen (screenshot below). Information useful for BFPCs on this screen:

- All scheduled appointments (past and future)
- Date and time of appointments
- Name of participant who has/had the appointment
- Participant category of the client who has/had the appointment
- Appointment type (hover cursor to see appointment type)
 - Certification
 - Nutrition Education
 - Health Update
- Appointment status
 - Scheduled (future appointment)
 - Seen
 - Cancelled
 - No Show
- Reason appointment was rescheduled (if applicable)

(Screenshots below)

- Advanced
- BF PC Caseload
- BF PC Assignment
- Investigator Family
- Waiting List
- New Family
- Family/Intake
 - Certification Guide
 - Family
 - Identity
 - Contact/Address
 - Income
 - Voter Registration
 - Application
 - Participant Category
 - Comments/Alerts
- Assessment
 - Visit Summary
 - Pregnancy
 - BF PC Documentation
 - Anthropometrics
 - Blood
 - Nutrition Interview
 - Risk
- Certification/Termination
 - Certification
- Education and Care
 - Referrals - Participant
 - Referrals - Family
 - Nutrition Education
 - Care Plan - Participant
 - Care Plan - Family
 - BF Equipment
- Foods
- Activity
 - Appointment History
 - Transfer Family
 - Retrieve Participant

Appointment History						
Date Time	Person ID	Participant Name	Category	Appt. Type	Appt. Status	Resch. Reason
06/22/2016 03:00 PM	8004136	Brad Johnson	Infant	WIC Appointme...	Scheduled	
05/18/2016 11:15 AM	8004136	Brad Johnson	Infant	WIC Appointme...	Scheduled	
05/18/2016 11:15 AM	8004135	Jane E Johnson	Breastfeeding	WIC Appointme...	Scheduled	
03/30/2016 08:15 AM	8004136	Brad Johnson	Infant	WIC Appointme...	Scheduled	
03/30/2016 08:15 AM	8004135	Jane E Johnson	Breastfeeding	WIC Appointme...	Scheduled	
02/24/2016 05:15 PM	8004136	Brad Johnson	Infant	WIC Appointme...	Seen	
02/24/2016 05:15 PM	8004135	Jane E Johnson	Breastfeeding	WIC Appointme...	Seen	

(Close up of Appointment History information)

Appointment History							
Appointment History							
	Date Time	Person ID	Participant Name	Category	Appt. Type	Appt. Status	Resch. Reason
▶	06/22/2016 03:00 PM	8004136	Brad Johnson	Infant	WIC Appointme...	Scheduled	
	05/18/2016 11:15 AM	8004136	Brad Johnson	Infant	WIC Appointme...	Scheduled	
	05/18/2016 11:15 AM	8004135	Jane E Johnson	Breastfeeding	WIC Appointme...	Scheduled	
	03/30/2016 08:15 AM	8004136	Brad Johnson	Infant	WIC Appointme...	Scheduled	
	03/30/2016 08:15 AM	8004135	Jane E Johnson	Breastfeeding	WIC Appointme...	Scheduled	
	02/24/2016 05:15 PM	8004136	Brad Johnson	Infant	WIC Appointme...	Seen	
	02/24/2016 05:15 PM	8004135	Jane E Johnson	Breastfeeding	WIC Appointme...	Seen	

TRANSFER FAMILY

You will have read-only rights for this screen, but there is no useful information for BFPCs. You are able to view this screen only because it is connected to the Appointment History screen.

RETRIEVE PARTICIPANT

You will have read-only rights for this screen, but there is no useful information for BFPCs. You are able to view this screen only because it is connected to the Appointment History screen. While you can Search for families, the Retrieve button is grayed out for you and doesn't function.