



# CLIENT TRANSFERS



## An Overview

### **What you will find in this module:**

- Information about the Client Transfers Module
- A list of learning objectives
- An overview of transfer policies and Client Services functions
- Transfer module self-tests and answer key



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**Washington WIC Nutrition Program does not discriminate.**

For persons with disabilities, this document is available on request in other formats.

To submit a request, please call 1-800-525-0127 (TDD/TTY711).

## About the Client Transfers Module

The Client Transfers module is a training tool created to help you become more familiar with WIC transfer policies and Client Services functions. You can use the module on your own, or review it with a group.

The module includes five PowerPoint Presentations:

- Introduction
- Section 1: Overview of Transfer Policies
- Section 2: Transfer Out
- Section 3: Preparing for a Transfer-In
- Section 4: Transfer-In

When using the module:

1. **Start with the Introduction section.**  
Continue reviewing the sections in order of section number.
2. **Test your readiness to advance to the next section.**  
Review the slides then answer Learning Assessment questions. Compare your answers to those provided.
3. **Move through the sections at your own pace.**  
Revisit information or continue to the next section when you are ready.
4. **Consider only printing slides you plan to reference later.**  
It may not be necessary to print slides.

Referenced policies and procedures are in Washington WIC Manual, Volume 1, Chapter 21 – Transfers / Verification of Certification.

## Learning Objectives

### Section 1: Overview of Transfer Policies

By the end of Section 1, you will be able to:

- Recall two reason WIC's transfer policies support clients and/or WIC staff.
- List items a client is required to provide at the time of the transfer.
- Correctly identify transfer notification requirements and transfer eligibility timeframes.

### Section 2: Transfer Out

By the end of Section 2, you will be able to:

- List at least two ways to help clients when they plan to transfer to a new WIC clinic.
- Recall how to print a Transfer Card using Client Services.
- Describe what happens to a client's record when a Transfer Card is printed.

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### **Section 3: Preparing for a Transfer-In**

By the end of Section 3, you will be able to:

- Recall why staff do not use the Transfer-In (TI) wizard until the person is physically present in the clinic.
- Identify the correct client record in the TI wizard and the “Similar Client Record(s) Found” pop-up message.
- Locate specific information in areas of the Transfer Data tab.
- Search for transfer records of existing clients.

### **Section 4: Preparing for a Transfer-In**

By the end of Section 4, you will be able to:

- Search for a Washington WIC client’s transfer information using the Transfer-In wizard.
- Recognize check features available after the client transfer is complete.
- Identify areas that staff must enter for “Out of State Transfer-Ins”.

## **Have questions?**

State WIC office staff are here to support you! Here’s how to contact us:

### **Client Services**

CIMS Support

1-800-841-1410 x 7

[CIMS.Support@doh.wa.gov](mailto:CIMS.Support@doh.wa.gov)

### **Policy and Procedures**

Local Agency Technical Assistance (LATA)

1-800-841-1410 x 0

### **WIC Training**

Training Development and Enrichment (TDAE)

1-800-841-1410 x 0

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## Highlights: Transfer related WIC policies and Client Services features

### When are clients eligible to transfer?

To qualify for a transfer, a client's certification **must be within a current eligibility period**. Clients in Expired status are out of eligibility and therefore cannot transfer.

- WIC clients with valid transfer documentation can receive services from a different WIC clinic through the end of their current eligibility period without being required to reapply.
- Transfer cards, also known as Verifications of Certification (VOC), include all required transfer documentation.

### Where can clients transfer their WIC services?

Clients can transfer to:

- A different WIC clinic located within our state.
- A WIC Clinic in a different state or U.S. Territories such as Puerto Rico, Guam, or American Samoa.
- A WIC Overseas program on a military base.

### How do clients know about transferring?

Staff are required to inform clients about their right to receive a transfer card during:

- The client's initial certification appointment.
- The client's subsequent appointments.
- When the client plans to move or receive services at a different location.



**Notifying clients about the right to transfer is a Basic Contact requirement.**

#### Tip:

Display the "WIC Moving Poster" to remind clients about transferring.

The poster can be ordered from the Department of Printing General Store:

[www.prt.wa.gov](http://www.prt.wa.gov)

### What do Transfer Cards look like?

Use CIMS Client Services to print Washington WIC Transfer Cards. They include all federally required transfer documentation items. Transfer Cards print on check stock.

- The **client** signs the "check stub" to show they got the Transfer Card.
- The **staff person** who generated the Transfer Card signs in the signature box. This person's name is printed below the signature box.

	Client Name: Barker, Daniella R	Client ID #: 995820050	88581563
Priority: 1	Income Determ. Date: Dec 20, 2007	EvergreenCHD-Emerald 258 E Main St Emerald, WA 98999- (360) 555-1312	
Date of Birth: Jul 3, 1987	Eligibility Begins: Nov 13, 2007	Eligibility Ends: Aug 31, 2008	
Date: 12/20/2007 Wt: 67" Vit: 123g Case: 12/20/2007 Hgt: 134	Last Check Issued: Jun 15, 2008		
Nutrition Risks Prg-pregnancy Dist + 19.0	<input type="checkbox"/> Angie T Wright <input type="checkbox"/> Clerk		
Notes: 120 PMP issued 6/15/08			

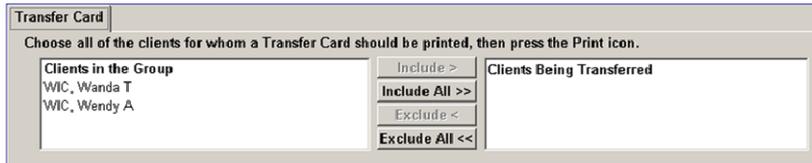
Transfer Cards from other states look different. Some states issue handwritten Transfer Cards.

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## How to Print Transfer Cards

Select a client or group member from the Desktop Find Client tab.

1. From the menu bar, select Client, then Transfer Card.
2. Include the group members who need Transfer Cards.  
Only the names of clients with a current eligibility period appear.



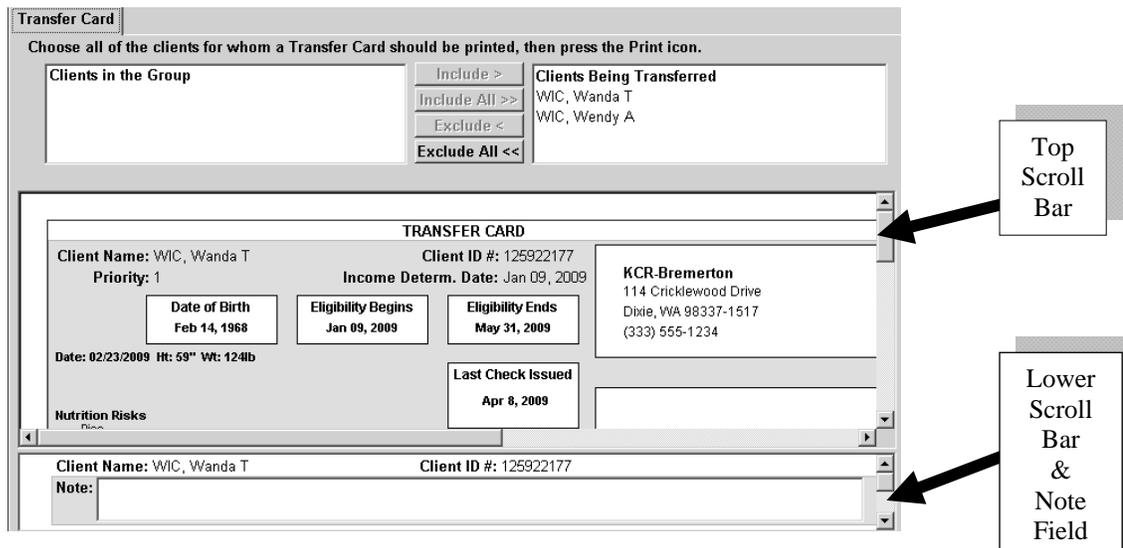
### Print checks before Transfer Cards.

Printing the Transfer Card changes the client's status to Termed. You can't print checks for clients in Termed status.

- When all members of a group need a Transfer Card, select [Include All].
- When only certain individuals from the group need a Transfer Card, select the client's name from the "Clients in the Group" box then select the [Include] button. Repeat the steps for each person in the group who needs a Transfer Card.

Client Services will generate a "view" of the Transfer Card for each client included in the "Clients Being Transferred" box.

Use the top scroll bar to look at the information for each group member selected.



A Note field is included for each client.

- Use the lower scroll bar to access the client's Note field.
  - Notes typed in this field will print on the Transfer Card.
  - Look at the name of the client and the Client ID # displayed above the Note field. The note you type will print on this person's Transfer Card.
  - Add notes you think staff at the next clinic will find helpful.
3. Type additional notes you want to have printed on the client's Transfer Card.
    - Notes you type in this area will **not** be saved once the Transfer Card is printed.
    - The typed notes will **not** be included as part of the in-state transfer data.

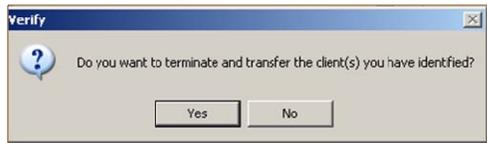
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Notes that automatically print on the Transfer Card include:

- Missing proof indicators, if the client was given a grace period for Proof of ID, Residency, or Income.
- “Needs Complete Certification” for clients in Presumed and Enrolled status.
- Disqualification start and end dates, if the client is pending a disqualification.
- Migrant income indicator, if applicable.
- “Rx ends date” if the client receives prescribed formula or foods.

4. To print Transfer Cards, select the Print icon.

5. Answer the verification message:



### Answering the verification message

[No] = Cancel/Do not print

- Transfer Cards will **not** print for any of the group members.
- Each client’s status remains the same.

[Yes] = Print

The following happens when the Transfer Card is printed:

- One Transfer Card prints for each group member selected.
- Any notes added in the client’s Transfer Card Notes field will print on the client’s Transfer card.
- Each client’s status changes to “Termed”.
- The termination reason, “Transfer”, is used.
- Client Services removes any future appointments scheduled for the clients.

The record **does not** actually transfer anywhere when [Yes] is selected.

## Issuing Transfer Cards

When eligible clients tell you about their plans to move, issue a Transfer Card.

When it comes to issuing Transfer Cards, **staff are:**

- **Allowed** to provide the Transfer Card to the client in person.
- **Not** allowed to mail Transfer Cards to clients.
- **Allowed** to provide transfer information to other WIC agencies verbally (over the phone), by fax, or by mail.



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## Help the client successfully transfer to the next clinic.

1. Instruct the client to:
  - Call the next clinic and schedule a “Transfer-In appointment”.
  - Keep the Transfer Card in a safe location until the appointment. Staff can only replace Transfer Cards one time.
  - Bring Proof of ID and Residency to the appointment and “missing proofs” if applicable.
  - Don’t get more checks until you are eligible to receive them again.
2. Let the client know the date they can get more checks.
3. Sign the Transfer Card and have the client sign the “stub”. Retain the stub and store it according to clinic policies.
4. If the client doesn’t know where to find the WIC clinic in their new community, offer to help find contact information.

Although staff at other clinics in Washington can search for the client’s transfer information, its best practice to issue a Transfer Card to the client. It makes the process at the next clinic easier and assures a smoother transition for the client.

## Required Documentation

Clients must provide the following documentation at the time they transfer into a clinic:

- Proof of Residency
- Proof of ID
- Transfer Card or other transfer documentation\*
- Any missing “proofs” not provided to the previous clinic.

When you’re transferring in a client, **don’t** reassess the client’s income eligibility unless the client notifies you of a change of income.

\* If a Washington WIC client didn’t receive a Transfer Card from their previous Washington WIC clinic, staff can use transfer data in Client Services in place of a Transfer Card.

If a transfer client doesn’t bring proof of residency or ID when transferring in:

- Document “not provided” on the Income Documentation tab for each missing item. This gives the client a “30 day grace period” and allows the client 30 days to bring in the missing items.
- Issue one set of checks, if the client is eligible to get checks.
- Notify the client that staff can’t give more checks until the “missing proof” is provided.

## Grace Period from the Previous Clinic

Client Services will help you know if the client was already given a 30 day grace period at the previous clinic.

If the client was already given a given a grace period at the previous clinic, you aren’t allowed to give an additional grace period for the same “missing proof” item (Proof of ID, Residency, or Income).

The client **can** transfer into the clinic, but can’t get more checks until all missing proof is provided to your clinic.

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## Ways Client Services Supports Transfers

Here are a few other ways Client Services helps with transfers:

- The information staff need to process in-state transfers is available without having to contact the client's previous clinic.
- Client Services will automatically include Federally required information on Transfer Cards.
- Only names of clients who are eligible to transfer will be included on the screen used to print Transfer Cards.
- Client Services lets you print Transfer Cards for all group members at once, or select individuals from the group so you can just print their Transfer Card.
- When you print a Transfer Card, Client Services will automatically change the client's status in your clinic from Active, Presumed, or Enrolled to Terminated, plus it'll document the termination reason.
- After the in-state transfer process, the following occurs:
  - If the client didn't receive a Transfer Card, Client Services will change the client's status from Active, Presumed, or Enrolled to Terminated at the previous clinic.
  - Client Services will delete any future appointments scheduled for the client at the previous clinic. This prevents the client from receiving a "No Show/We Missed You Letter", and it frees up the appointment time slot making it available for scheduling.
- Client Services also supports staff when transferring client into the clinic from out-of-state. Although data for clients participating in other states' WIC programs isn't available in Client Services, staff can manually enter transfer information into the system.

## Preparing for a Transfer-In

Most clients will call when they need to schedule an appointment to transfer-in.

**Don't** use the Transfer-In wizard over the phone. Wait until the person is physically present in the clinic. You must document the Proof of ID and Residency that you saw in the Transfer-In wizard.

**Start by searching your clinic's database for the client's record.**

## Searching For Transfer Records of Existing Clients

If you find a record for the client on your database, follow these steps:

1. Select the client record on the Desktop.
2. Select "Search for Transfer Record" from the Client menu bar.

You must manually search for transfer records for clients whose names are already in your clinic's database. You can't use the Prescreen wizard for these "existing clients".

- If you find one or more record that matches, an informational window appears. Review the information to determine if or when the client should be scheduled a Transfer-In appointment. Select the [Close] button when finished.

- If you don't find records that would be a match, a pop-up message appears. Press the [Ok] button to close the message and return to the Desktop. Determine the appropriate type of appointment to schedule.

## Searching for Transfer Records using the Prescreen Wizard

If the client doesn't have a record in your clinic's database, first use the Prescreen wizard to collect information then schedule a Transfer-In (TI) appointment.

Note: If the client is in your office, you can begin using the Transfer-In wizard.

When you use the Prescreen Wizard, you'll be asked to identify the "type" of client you are Prescreening.



If the client doesn't have a record in your clinic's database and is not being added to a group, verify that the client is a "New Client/New Group".



If the client doesn't have a record in your clinic's database but is being added to a group, verify that the client is a "New Client/Existing Group". If you didn't select the group on the Desktop first, you'll need to close the TI wizard, select the group on the Desktop, then use the TI wizard.

As you enter information into the Demographics tab of the Prescreen wizard, Client Services will automatically search for Washington WIC clients' transfer data comparing the following information:

- First name (first initial)
- Last name (first initial)
- Date of birth
- Gender

## Similar Client Record(s) Found Screen

The Similar Client Record(s) Found screen appears when Client Services finds one or more WA client records with similar data entered on the Demographics tab.

Name	Birth Date	Gender	Category	Status	Clinic
Henry, Jaysen T	1/19/2009	M	I	Active	KCR-Bremerton

Client Id: 125922486	Transfer Card Id:	Clinic: KCR-Bremerton
<b>Client Name: Henry, Jaysen T</b>		Status: Active
Category: I	Gender: M	Birth Date: 1/19/2009
Caregiver Abalos, Jennifer R	Missing Proofs	Eligibility 3/12/2009 - 2/28/2010
Check Info First Day To Use: 8/2/2009 Food Package: Formula 6 to 12*6 <input checked="" type="checkbox"/> Rx	Migrancy <input type="checkbox"/> Migrant	Race/Ethnicity Hispanic or Latino Ethnicity Yes <input type="radio"/> No <input checked="" type="radio"/> <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Asian <input type="checkbox"/> Black <input type="checkbox"/> Native Hawaiian / Pacific Islander <input checked="" type="checkbox"/> White
Lost/Stolen Date:	Selected client is a match? Yes <input type="button"/> No <input type="button"/>	

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Review the message to determine if any of the records is the correct record to use for the transfer.

Answer the question at the bottom of the screen, “**Selected client is a match?**”

- Select [No] when **none** of the records in the top area is a match for the client. You will continue using the Prescreen wizard.
- When you find a record that **is a match** and want to use that record for the transfer, **select (highlight) the one correct record** then press the [Yes] button. You will continue using the Prescreen wizard.

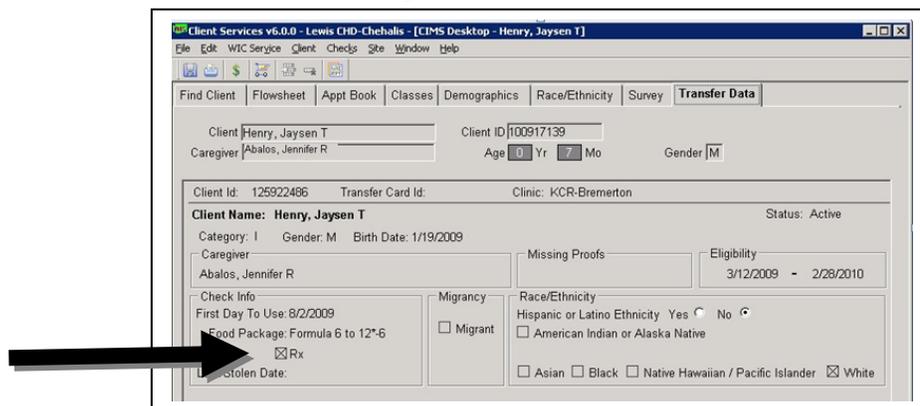
## Transfer Data tab

When you select [Yes] and finish the Prescreen Wizard, the Transfer Data tab appears on the Desktop.

- The Transfer Data tab includes the same details as the Similar Client Record(s) Found message.
- It remains on the Desktop until you complete the Transfer-In wizard for the client, or until the client’s eligibility period expires.
- Use the Transfer Data tab to see information such as when the client is eligible to receive checks, any missing proofs the client needs to provide at the Transfer-In appointment, and whether the client has a prescription on file at the previous clinic.

## Rx Indicator

An “X” appears in the Rx box of the Transfer Data tab when the client has been receiving prescribed WIC formula or foods at the previous clinic.



**Prescription information isn’t part of the transfer record sent from the previous clinic.**

The “Rx indicator” (the “X” in the Rx box) is meant to alert staff that prescription information is required. The prescription end date isn’t included on the Transfer Data tab.

**Staff are required by policy to get the client’s prescription information and document it within 30 days of the transfer.**

Ask the client to bring a copy of the completed Prescription Form to the Transfer-In appointment, or contact the previous clinic to request a copy of the Prescription Form. It is best to get it in time for the client's Transfer-In appointment.

Note in the Flowsheet that prescription information is required and communicate about any action taken to collect the client's prescription information.

When you finish the Transfer-In Wizard:

- The Transfer Data tab disappears, and the Rx indicator disappears with it.
- Areas of Client Services where you'd typically find Rx indicators, such as the Print Checks tab, won't show the indicator.
- Nothing from the client's record at the previous clinic entered in "Record Prescription" appears in the record at your clinic.
- The Assign Foods tab will show the foods staff prescribed to the client at the previous clinic.
- Checks will include the assigned foods until the prescription ends, or until staff change the assigned foods.
- You can use "Record Prescription" to document the client's prescription information. You have to wait until you finish the Transfer-In wizard to record the prescription information.

### Other helpful indicators

When staff gave a grace period to the client at the previous clinic, a dot will appear next to the client's name and codes will appear in the missing proofs area. Codes include:

- Inc = Income
- ID = Identification
- Res = Residency

If the client has migrant income, you'll find the "Migrant" box checked.

The "Lost/Stolen Date" includes a date if a client reported checks lost, stolen, or destroyed in the past 6 months.

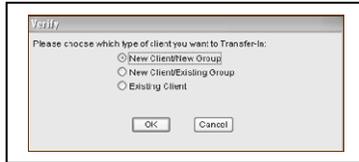
The screenshot shows a client record form for Ernie W. Parker. The form includes a table at the top with columns for Name, Birth Date, Gender, Category, Status, and Clinic. Below the table, there are several sections: Client Information (Client ID, Transfer Card ID, Clinic, Client Name, Status), Caregiver Information (Caregiver Name), Missing Proofs (Inc, ID, Res), Eligibility (4/14/2008 - 9/30/2008), Check Info (First Day To Use, Food Package, Lost/Stolen Date), Migrancy (Migrant checkbox), and Race/Ethnicity (Hispanic or Latino Ethnicity, American Indian or Alaska Native, Unknown, Asian, Black, Native Hawaiian / Pacific Islander, White). Three black arrows point to the 'Migrant' checkbox, the 'Missing Proofs' section, and the 'Lost/Stolen Date' field.

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## Using the Transfer-In Wizard for Out-of-State Clients

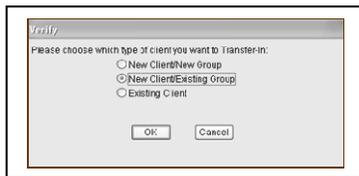
You'll use the Transfer-In wizard for clients who are transferring into your clinic from a different state, U.S. Territory, or WIC Overseas program. When the client is physically present at the clinic and has required transfer documentation, use the Transfer-In wizard.

1. **Identify** the “type” of client you are transferring into your clinic.



The screenshot shows a dialog box titled "Verify" with the text "Please choose which type of client you want to Transfer-In:". There are three radio button options: "New Client/New Group" (which is selected), "New Client/Existing Group", and "Existing Client". At the bottom are "OK" and "Cancel" buttons.

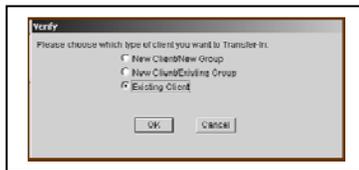
If the client does not have a record in your clinic's database and is not being added to a group, open the Transfer-In wizard and verify that the client is a **“New Client/New Group”**.



The screenshot shows a dialog box titled "Verify" with the text "Please choose which type of client you want to Transfer-In:". There are three radio button options: "New Client/New Group", "New Client/Existing Group" (which is selected), and "Existing Client". At the bottom are "OK" and "Cancel" buttons.

If the client does not have a record in your clinic's database but is being added to a group, open the Transfer-In wizard and verify that the client is a **“New Client/Existing Group”**.

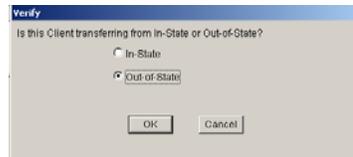
If you didn't select the group's record on the Desktop before using the Transfer-In wizard, you'll need to close the wizard, select the group, then use the TI wizard.



The screenshot shows a dialog box titled "Verify" with the text "Please choose which type of client you want to Transfer-In:". There are three radio button options: "New Client/New Group", "New Client/Existing Group", and "Existing Client" (which is selected). At the bottom are "OK" and "Cancel" buttons.

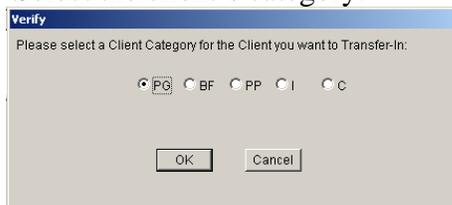
If the client has a record in your clinic's database, select it on the Desktop, open the Transfer-In wizard, and verify this client is an **“Existing Group”**.

2. Verify the client is transferring from **“Out of State”**.



The screenshot shows a dialog box titled "Verify" with the text "Is this Client transferring from In-State or Out-of-State?". There are two radio button options: "In-State" and "Out of State" (which is selected). At the bottom are "OK" and "Cancel" buttons.

3. Select the client's category.



The screenshot shows a dialog box titled "Verify" with the text "Please select a Client Category for the Client you want to Transfer-In:". There are five radio button options: "PG" (which is selected), "BF", "PP", "I", and "C". At the bottom are "OK" and "Cancel" buttons.

4. Continue by manually entering transfer information into the record.

**Income Documentation** | Demographics | R/E | TI | Measures | Assessment | Referrals | Basic Contact | Notes | Finish

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**Note:** The risk “Out of State Transfer” will automatically fill on the Assessment tab. Document other risks and measurements found on the Transfer Card. Some states use Federal risk codes.

### **Income Documentation tab**

**You are required to document Proof of ID and Residency.**

You don't reassess income for transfer clients unless they inform you of a change of income. The following income information will automatically fill in:

- Number in household = 1
- Source and Proof of Income = Other
- Income amount = \$0

If you need to update income information, select the [Edit Income] button and fill in income data.

### **Demographics and R/E tabs**

Enter Demographics tab information and document responses to the Race/Ethnicity questions.

### **TI tab**

Enter eligibility begin and end dates from the Transfer Card.

If the Transfer Card indicates the other state's WIC program established an eligibility period shorter than Washington's, apply Washington's eligibility rules and extend the client's eligibility end date accordingly.

When the **TI tab** includes the feeding method and breastfeeding fields enter data into them.

The image contains two screenshots of a software interface. The left screenshot shows a 'Feeding Method' dropdown menu with a list of options: Fully Breastfeeding, Partially Breastfeeding, Some Breastfeeding, and Fully Formula Feeding. The right screenshot shows a 'Breastfed' dropdown menu with options: Currently, Stopped, and Never. It also includes fields for 'Date BF Stopped', 'Date Formula/Milk Introduced', and 'Date Solids Introduced', all with '00/00/0000' as the default value, and an 'Infant Medical Provider' text field.

### **Measures tab**

When entering information on the measures tab, make sure to change the date to match the measurement date. Add a new line, highlight the date field, and enter the measurement date before entering the measurement. After you enter measurements, select [Identify New Risks]. You aren't required to enter **measurements** in order to complete the Transfer-In wizard.

### **Assessment tab**

Client Services automatically identifies “Out-of-State Transfer”. Document additional risks printed on the Transfer Card. Some states use Federal Risk factor codes.

### **Referrals tab**

Document referral information you discuss with the transfer client.

### **Basic Contact tab**

Document required Basic Contacts.

### **Notes tab**

Enter transfer related notes or skip the tab.

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## Finish tab

After selecting the [Finish] button, you will return to the Flowsheet tab on the Desktop.

## Check Features after a Transfer-In

- **Check Pick-Up** works the same after the Transfer-In wizard is completed. You will be able to print checks the client is eligible to receive.

For in-state transfer clients, the Food Package and Assign Foods tab will reflect those assigned at the previous WIC clinic. **Don't** change the assigned foods; a CPA must assess the appropriateness of any changes to assigned foods

- **Check History isn't available.** You won't be able to view information about checks the client was issued at the previous clinic.
- **Determine whether prescribed foods or formula were assigned at the previous clinic.** Look at the client's transfer documentation. Review the Flowsheet notes in case staff at your clinic made notes. They might have seen the Rx indicator or made notes about steps they took to get prescription information for the client. The Assign Foods tab will show foods assigned at the previous WIC clinic. You might see foods or formula that required a prescription to assign.
- **Missing Proof and Lost/Stolen/Destroyed rules apply.** You will receive pop-up messages reminding you about the rules.
- **Call CIMS Support** (1-800-841-1410 x 7) if you need assistance replacing checks issued by the previous clinic or if you cannot obtain prescription information from the previous Washington WIC clinic.

**Questions about transfer policies?**

Call Local Agency Technical Support (LATA) at 1-800-841-1410 x 0

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# APPENDIX

Transfer Module Self-Tests and Answer Key

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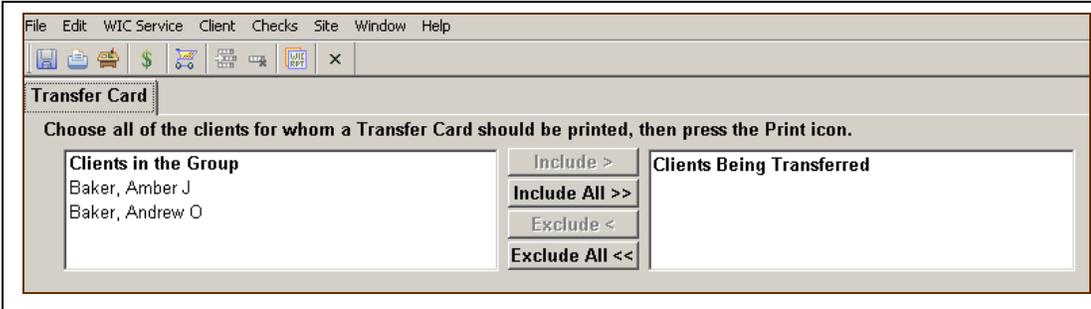
# TRANSFER MODULE SELF TESTS

## MODULE 1

1. Recall two reasons WIC's transfer policies support clients or WIC staff.
2. List items a client is required to provide at the time of the transfer.
- 3a. True or False? Staff are required to notify clients of their right to transfer.
- 3b. True or False? Transfer clients must be within a current eligibility period.

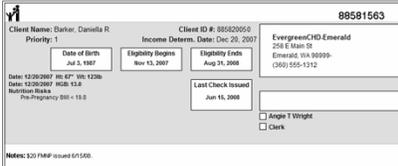
## MODULE 2

1. List at least two ways to help clients when they plan to transfer out.
2. Recall how to print a Transfer Card. How would you print a Transfer Card for Andrew but not Amber?



The screenshot shows a software window titled "Transfer Card" with a menu bar (File, Edit, WIC Service, Client, Checks, Site, Window, Help) and a toolbar. Below the toolbar, there is a text instruction: "Choose all of the clients for whom a Transfer Card should be printed, then press the Print icon." The main area is divided into two columns. The left column, titled "Clients in the Group", contains a list of names: "Baker, Amber J" and "Baker, Andrew O". The right column, titled "Clients Being Transferred", is currently empty. Between the two columns are four buttons: "Include >", "Include All >>", "Exclude <", and "Exclude All <<".

3. List at least two things that happen to a client's record when a Transfer Card is printed.
4. Transfer Cards must have a staff signature to be valid. Which area of the card do staff sign?



The screenshot shows a completed "Transfer Card" for a client named Daniela R. The card contains the following information:

- Client Name: Daniela R
- Client ID #: 88520500
- Income Determ. Date: Dec 29, 2007
- Date of Birth: Jul 2, 1987
- Eligibility Begins: Nov 12, 2007
- Eligibility Ends: Aug 31, 2008
- Evergreen/CHD Emerald: 258 E Main St, Emerald, WA 98026, (360) 555-1312
- Date: 12/29/2007 10:47 AM 12/29
- Date: 12/29/2007 10:47 AM 12/29
- Birthdate: 07/02/1987
- Pre-Pregnancy BMI: 18.0
- Last Check issued: Jun 16, 2008
- Notes: 12/29/2007 issued 8/15/08.

At the bottom of the card, there are two checkboxes: "Angle T Weight" and "Check".

Transfer Card

T

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## MODULE 3

1. Why do clients have to be physically present for the Transfer In appointment?
2. If you received this Similar Client Records Found pop-up message and had this conversation with the client, would you indicate any of these records as a match? If yes, which one and why?

**The client provided this information over the phone:**  
First Name: An                      Last Name: Lee                      Date of birth: 09-15-1988

**“Similar Client Record(s) Found” pop-up message information:**

Client Name	Date of birth	Transfer ID	Category	Status	Clinic
Ang Lee	09-15-1988	99995561	PG	Termed	Walla Walla
Angie Lee	09-15-1988	98675309	BF	Termed	Puyallup

**Conversation:**  
You: “Where did you last receive WIC?”  
Caller: “Walla Walla”.  
You: “Did you receive a Transfer Card from the Walla Walla clinic?”  
Caller: “Yes, I have it right here.”  
You: “Would you please tell me the numbers on the top right corner of the card?”  
Caller: “Yes, they are 99995561”.

3. Locate these areas of the Transfer Data tab:  
Client ID number, Rx indicator, Eligibility dates, and the First Day To Use date for the last set of checks issued to the client.

The screenshot shows the 'Client Services v6.0.0' application window. The 'Transfer Data' tab is active. The client information is as follows:

- Client: Henry, Jaysen T (Client ID: 100917139)
- Caregiver: Abalos, Jennifer R (Age: 0 Yr, 7 Mo, Gender: M)
- Client ID: 125922486, Transfer Card Id: [blank], Clinic: KCR-Bremerton
- Client Name: Henry, Jaysen T (Status: Active)
- Category: I, Gender: M, Birth Date: 1/19/2009
- Caregiver: Abalos, Jennifer R
- Missing Proofs: [blank]
- Eligibility: 3/12/2009 - 2/28/2010
- Check Info: First Day To Use: 8/2/2009, Food Package: Formula 6 to 12\*6,  Rx, Lost/Stolen Date: [blank]
- Migrancy:  Migrant
- Race/Ethnicity:  Hispanic or Latino Ethnicity,  American Indian or Alaska Native,  Asian,  Black,  Native Hawaiian / Pacific Islander,  White

Transfer Data tab

- 
4. How do you search for transfer records of “Existing” clients?  
Remember, Client Services does not allow you to use the Prescreen wizard for clients who already have records in your database.

#### MODULE 4

1. If you were using the Transfer-In wizard for a WA WIC client, but you did not know the client’s Transfer ID # or previous Client ID #, which **4 fields** must you enter information into for Client Services to be able to search for the record?
  
2. Which of the statements are true about check functions after the client transfers in?
  - A. You can view information about the client’s checks printed at the previous clinic.
  - B. The Rx indicator appears on check screens.
  - C. Print checks works the same.
  
3. What data do staff need to manually fill in for Out-of-State transfer clients in order to complete the Transfer-In wizard?

Income  
ID and Residency Proof  
Eligibility Dates  
Measurements and Risks  
Mandated Referrals  
Basic Contact Items  
None

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## Answer Key

### MODULE 1

1. Recall two reasons WIC's transfer policies support clients or WIC staff.

Policies prevent the certification process from being duplicated. Transfer clients do not need to reapply for WIC services until the end of their eligibility period. This saves time for clients and staff.

Policies reduce the chance that clients would miss out on checks. Staff ensure clients are transferred into the clinic in time to receive uninterrupted program benefits. When clinics are not serving a specific category or age group because of funding or caseload issues, clinics are still required to serve a transfer client.

Policies allow more flexibility for our mobile population. Staff are able to use information in Client Services as transfer documentation for WA WIC clients. Staff can also offer grace periods for missing proofs in certain situations.

2. List items a client is required to provide at the time of the transfer.

Proof of Residency

Proof of ID

Any "proofs" not provided to the previous clinic.

Transfer card\*

\* When WA WIC clients do not provide a transfer card, Client Services transfer data is acceptable as transfer documentation. Proofs are still required.

- 3a. True or False? Staff are required to notify clients of their right to transfer.

True! Staff are required to notify clients of their right to transfer at the client's initial and subsequent certifications. This is a Basic Contact requirement.

- 3b. True or False? Transfer clients must be within a current eligibility period.

True! Only clients who are within a current eligibility period are eligible to transfer.

Note: Clients with Client Services records in "Expired" status are not eligible to transfer because the eligibility period has expired.

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## MODULE 2

1. List at least two ways to help clients when they plan to transfer out.

Remind the client about WIC participation rules.

Tell the client which date additional checks can be issued to help prevent dual participation.

Suggest an approximate date to schedule the Transfer-In appointment to help align the client's check issuance schedule.

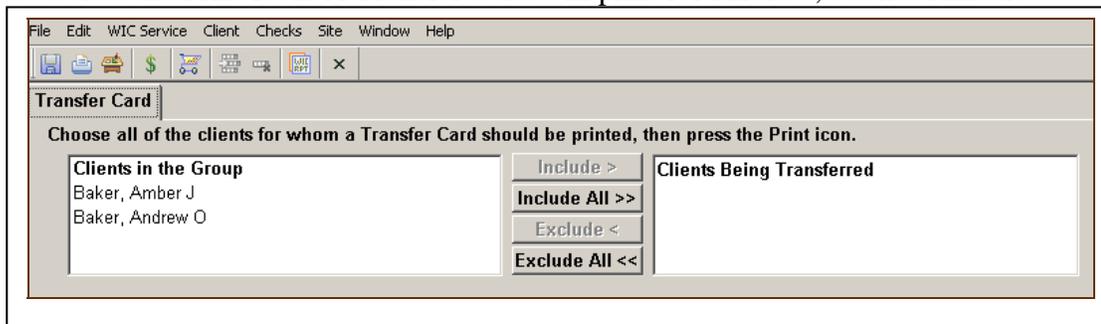
Provide contact information for WIC clinics in the client's new community.

List items the client is required to bring to the appointment.

Provide helpful documentation such as a Transfer Card or a copy of the client's WIC Prescription Form. Ask the client to bring these to the Transfer-In appointment.

2. Recall how to print a Transfer Card. How would you print a Transfer Card for Andrew but not Amber?

1. Highlight Andrew's name in the Clients in the Group box.
2. Select the [Include] button. Andrew's name will move to the Clients Being Transferred Box.
3. Select the Print Icon. A Transfer Card will print for Andrew, but not Amber.



3. List what happens to a client's record when a Transfer Card is printed:

The client's record is terminated.

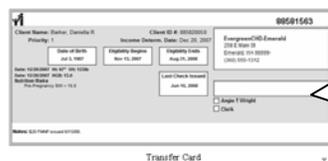
"Transfer" is documented as the record's termination reason.

The record's status changes from Active, Presumed, or Enrolled to Termed.

Client Services will not allow you to print checks because the client's record is in Termed status.

Any future appointments scheduled for the client will be automatically deleted from the clinic's Appointment Book schedule.

4. Transfer Cards must have a staff signature to be valid. Which area of the card do staff sign?



Staff sign the signature box.

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## MODULE 3

1. Why do clients have to be physically present for the Transfer In appointment?

Clients need to be physically present in the clinic for the Transfer-In because staff must document in the Transfer-In wizard the client's proof of ID and Residency they saw. It is policy.

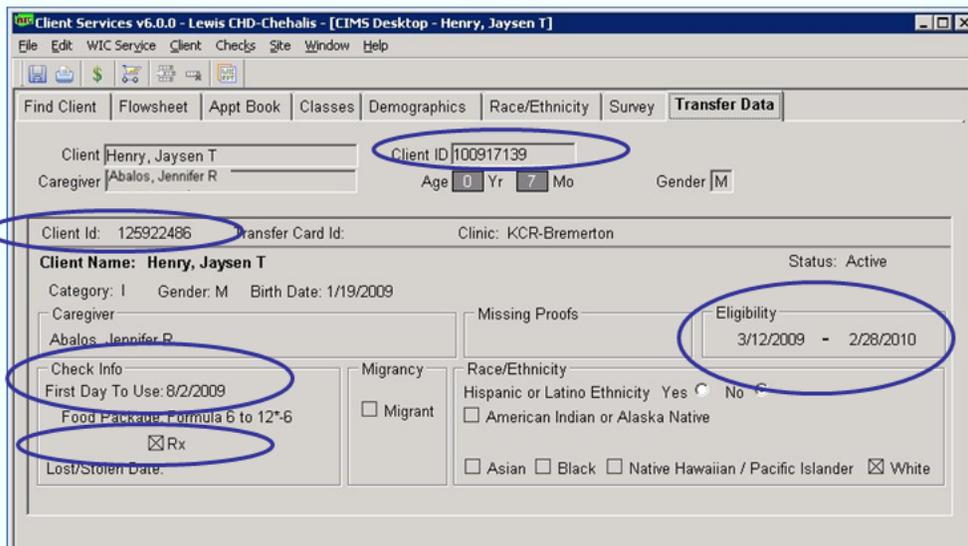
Remember, when clients call to make a Transfer-In appointment, use the Prescreen wizard. Collect the client's information on the Demographics tab and Client Services will do the automatic search for "transfer records" of clients participating at a Washington WIC clinic.

2. Based on the information provided, do any of the client records a match? If yes, indicate which record is a match.

Yes. The Transfer Card numbers match Ang Lee.

Client Name	Date of birth	Transfer ID	Category	Status	Clinic
Ang Lee	09-15-1988	99995561	PG	Termed	Walla Walla
Angie Lee	09-15-1988	98675309	BF	Termed	Puyallup

3. Locate these areas of the Transfer Data tab:  
Client ID number, Rx indicator, Eligibility dates, and First Day To Use of the last checks issued to the client.



The screenshot shows the 'Transfer Data' tab in the Client Services v6.0.0 software. The client is Henry, Jaysen T. The Client ID is 100917139. The Client ID is 125922486. The First Day To Use is 8/2/2009. The Rx indicator is checked. The Eligibility dates are 3/12/2009 - 2/28/2010.

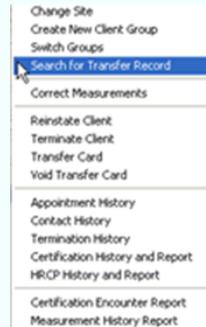
- 
4. How do you search for transfer records of “existing clients”?

## Search for Transfer Record

To check if an existing client has a transfer eligible record at another WA clinic:

1. Select the client record on the Desktop.
2. Select “Search for Transfer Record” from the Client menu bar.
3. An information window will appear if a transfer eligible record at a different WA WIC clinic.

Review the information and schedule the client accordingly.



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## MODULE 4

1.

When you are not able to use the Transfer ID # or the Client ID # to search for a client's record, you must enter information into these 4 fields:

**Last name** (at minimum, the first initial )

**First name** (at minimum, the first initial )

**Date of Birth** (DOB)

**Gender** (male or female)

The screenshot shows a software window titled "WIC Service" with a menu bar (File, Edit, WIC Service, Client, Checks, Site, Window, Help) and a toolbar. The "Find" tab is selected, showing search options: Income Documentation, Demographics, R/E, TI, Measures, Assess Risk, Referrals, Basic Contact, Notes, and Finish. Search fields include Transfer Id, Client Id, Last Name, First Name, and Date of Birth (DOB). The "Last Name" and "First Name" fields are highlighted with a blue box. There are "Clear" and "Find" buttons. Below the search fields is a table with columns: Name, Birth Date, Gender, Category, Status, and Clinic.

2. Which of the statements are true about check functions after the client transfers in?

c. Print checks works the same.

3. What data do staff need to manually fill in for Out-of-State transfer clients in order to complete the Transfer-In wizard?

ID and Residency Proof

Eligibility Dates

Mandated Referrals

Basic Contact Items

Note: Staff also document any measurements and risks printed on the Transfer Card, but Client Services won't keep you from finishing the Transfer-In wizard.