

Client Services 5.1 - Software Changes (Release Notes)

March 2009

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Purpose of Release

This version of Client Services incorporates the Assessment questions into the Assessment tab in WIC service wizards. Features of this release include:

- Renaming of the Assess Risk tab to Assessment tab.
- A separate window containing tabs for Assessment Questions, Summary, and Notes that opens automatically in the certification wizards. The window is accessible from the Assessment tab in all wizards.
- A list of available Assessment Questions based on the client's category, age, and the infant's feeding method.
- Assignment of risk factors directly from the Assessment Questions.
- Ability to add and save risk factor notes from the Assessment window.
- Ability to add and review notes on the Notes tab before determining a client's eligibility.
- The addition of a Summary tab to see all assigned risks.
- Risks associated with age at conception are now auto-calculated for pregnant women.

Assessment Tab

The Assess Risk tab was renamed Assessment to more accurately describe its function. A button was added to open a separate window for the assessment questions.

The screenshot shows the 'Assessment' tab in a software interface. At the top, there are several tabs: '2C', 'Measures', 'Assessment' (highlighted), 'Topics', 'Handouts', 'Referrals', 'Basic Contact', 'Notes', and 'Finish'. Below the tabs, there are input fields for 'Client' (Russell, Jennifer T), 'DOB' (09/24/2006), 'Category' (C), 'Caregiver' (Russell, Leslie T), 'Age' (2 Yrs 4 Mos), and 'Gender' (F). There are also radio buttons for 'Medical' and 'Non-Medical'. Below these fields is a 'Risk Factors' list with items like 'Food Allergy (severe diet impact)', 'Lactose Intolerance', and 'Gastrointestinal Disorder'. To the right, there is a table titled 'Client's Risks' with columns for 'Date', 'Note', and 'Client's Risks'. The table contains two rows of data. A button labeled 'Assessment Questions' is circled in red in the bottom right corner of the form area.

Date	Note	Client's Risks
02/20/2009	<input type="checkbox"/>	Height / Age <= 5th
02/20/2009	<input type="checkbox"/>	Inadequate Vitamin/Mineral Supplemer

Assessment Tab with Assessment Questions button

To help you determine when the Assessment Questions should be asked, the Assessment window will automatically open from the Assessment tab when using a New Certification, Recertification, Complete Certification, or Health Assessment wizard. You'll be able to access the VENA questions by clicking the Assessment Questions button when you're in any other wizard.

The Assessment tab works the same way it did previously. You can manually add risk factors and risk factor notes. You will also be able to view the risk factors and notes added from the Assessment Questions. When all risks have been assigned, click the Calculate Eligibility button and continue with the wizard as usual.

Assessment Window

An Assessment window opens automatically when you go to the Assessment tab in any certification wizard (NC, RC, CC, or HA). You can also open the window manually by clicking the Assessment Questions button available on the Assessment tab in all wizards. There are 3 tabs within this window:

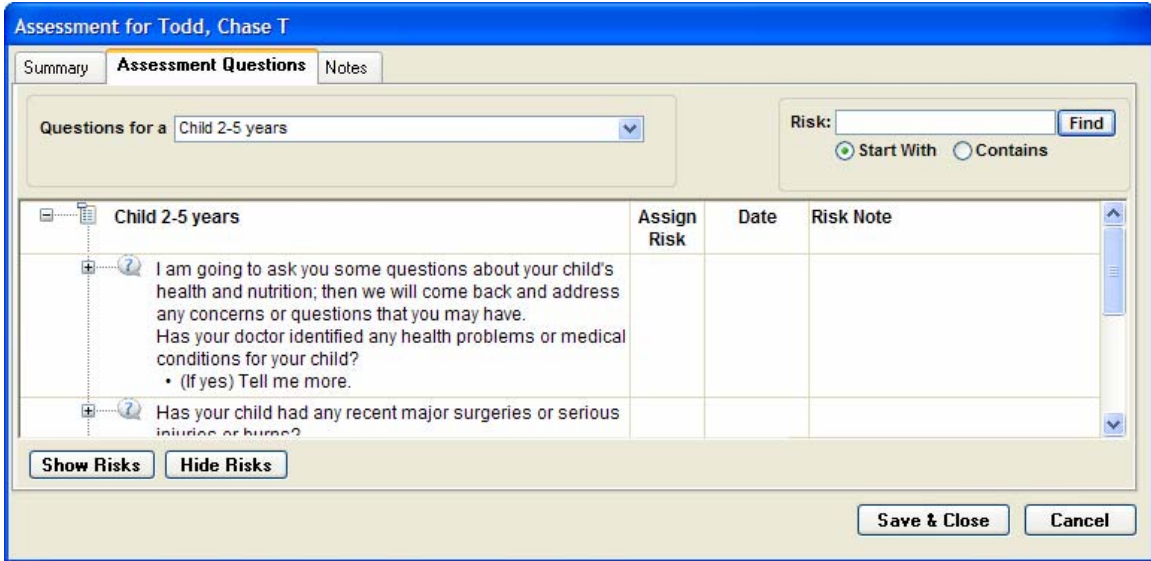
- Summary
- Assessment Questions
- Notes

The Assessment window must be closed before you can continue with the wizard. Close it by selecting either the Save and Close button or the Cancel button. If you select Save and Close, any risks assigned and notes are saved. The Assessment Questions window can be opened again and additional risks or notes added. If you select Cancel, any newly added risks or notes will not be saved.

You can move the Assessment window anywhere on the screen by placing your cursor in the window's blue title bar, holding the left mouse button down, and dragging the window. No matter where the window is when you close it, the window always opens in the center of your Client Services window.

Assessment Questions

The Assessment window opens at the Assessment Questions tab. The name of the questionnaire is displayed at the top of the tab and is based on the client’s category as well as age (children and infants) and feeding method (infants).



Assessment Questions tab

For the most part, the questions are the same ones in use since January 2008. Modifications were made to some questions as well as the order of questions. Each question includes the associated risk factors; however, most risk factors are hidden from view when the Assessment window first opens. If a risk factor has already been assigned (through auto-calculation, carry-forward of risks, or previous assignment), the associated question displays in blue with the view expanded to show the risk factors. High Risk risk factors continue to display in pink.

To see the risks associated with a single question

- Click the icon to the left of the question, or
- Double-click anywhere on the question.

To see all risks for all questions, click the Show Risks button.


	How has your appetite been? Are there foods you limit or avoid for any reason, including food allergies? • (If yes) Tell me more.			
	■ Food Allergy (severe diet impact)	<input type="checkbox"/>		
	■ Lactose Intolerance	<input type="checkbox"/>		
	■ Very Restrictive Diet	<input type="checkbox"/>		
	Do you: -Drink raw milk or fresh squeezed juice?			

Sample Assessment Question Expanded to Show Associated Risks

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Most of the assessment questions have one or two associated risks. The question about health problems/medical conditions has over 25 associated risk factors. You may want to hide these risks and just show the question.

To hide the risks associated with a single question

- Click the  icon to the left of the question, or
- Double-click anywhere on the question.

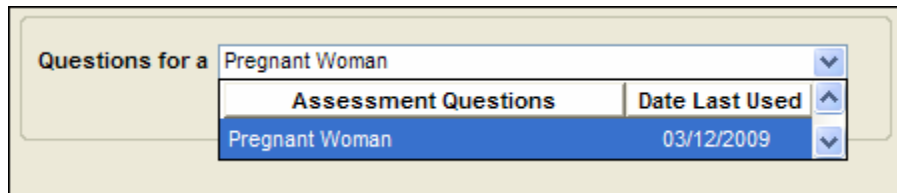
To hide all risks for all questions, click the Hide Risks button.

To give you a visual cue that a risk has been assigned, the associated question changes to blue and automatically expands. There are a few questions that include the same risk. If the risk is assigned on one question, all questions with that same risk display in blue and have the risk checked.

Questionnaires

For most clients there is only one set of assessment questions. Questionnaires are based on the client's category and age.

For example, when certifying a pregnant woman, the questions automatically open to the Pregnant Woman questionnaire. There is no other option. You can see if or when the questionnaire was previously used by clicking the down arrow.



Only the most recent 'Last Used' date displays.

Similarly, when recertifying a pregnant woman to breastfeeding, only the Breastfeeding Woman questionnaire is available.

The questions for a child are based on the child's age on the date the Assessment Questions are opened. Only one of two questionnaires will be available:

- Child 1-2 years
- Child 2-5 years

There are 9 question sets for infants, based on the infant's age, feeding method, and whether solids have been introduced or not. A Selection Criteria box is available to help narrow the list of available questionnaires so you can select the most appropriate one. The questionnaires are automatically sorted for the infant's age. You may select a Feeding Method and whether Solids have been started or not.

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Selection Criteria
Age: 0 - <6 Feeding Method: [Show All] Solids: [Show All]
Questions []

Infant Questionnaire Options

Available options are:

Selection Criteria
Age: 0 - <6 Feeding Method: [Show All] Solids: [Show All]
[Show All] [Show All] [Show All]
0 - <6
6 - 12
Fully Breastfed
Partially Breastfed
Fully Formula Fed
Yes
No

Selection Criteria for Infant Assessment Questions

There are 6 questionnaires associated with infants less than 6 months old based on the infant's feeding method and whether or not solid foods have been started.

There are 3 questionnaires for infants 6 - 12 months old based on feeding method. The selection criteria assume solids have been started. If you select No to solids, there will be no questionnaires to select.

Quick Hint: For infants 6 - 12 months, leave the Solids as [Show All].

Once the selection criteria are entered, use the down arrow to select the appropriate questionnaire.

Selection Criteria
Age: 0 - <6 Feeding Method: Partially Breastfed Solids: No
Questions []

Age	Feeding Method	Solids?	Date Last Used
0 - < 6 months	Partially Breastfed	No Solids	

Selection Results

Assigning Risk Factors

To select a risk factor, click the box in the Assign Risk column to the right of the risk. The date automatically fills with the Date Service Provided and is not editable.

<p>How has your appetite been? Are there foods you limit or avoid for any reason, including food allergies? • (If yes) Tell me more.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Food Allergy (severe diet impact) <input checked="" type="checkbox"/> Lactose Intolerance <input type="checkbox"/> Very Restrictive Diet <p>Do you: -Drink raw milk or fresh squeezed juice?</p>	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	 03/12/2009 	 Anything over 1/2c milk or ice cream causes symptoms. Cheese OK
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Selected Risk with Note

You can enter a short risk factor note. As you type in a note, the text remains on a single line that scrolls to the right. The field auto-sizes to display the entire note after you tab out of it. Risk notes are the same notes as on the Assessment tab.

Once a risk factor has been assigned, the question turns blue. If you open the Assessment Questions later (as a continuation of the certification or in another wizard) questions with assigned risks are expanded with the risk factors displaying. All other questions remain collapsed with the risk factors hidden.

When you have completed the list of questions, click the Save and Close button. If you select Cancel, the window closes without saving any of the assigned risk factors or notes.

On the Assessment tab, you can see all of the client's risk factors, including auto-assigned risks. Risk factor notes entered on the Assessment Questions tab are displayed. Similarly, if you add a risk factor or note on the Assessment tab, it will be visible on the Assessment Questions tab.

The screenshot shows the 'Assessment Questions' window. On the left, a list of 'Risk Factors' includes 'Lactose Intolerance'. Below this list, a text field for 'Risk Factor Note' contains the text 'Anything over 1/2c milk or ice cream causes symptoms. Cheese OK'. On the right, a table titled 'Client's Risks' displays the following data:

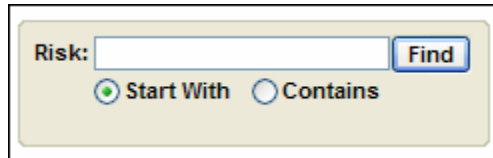
Date	Note	Client's Risks
03/12/2009	<input type="checkbox"/>	Pre-Pregnancy BMI >= 26.1
03/12/2009	<input type="checkbox"/>	Two Pregnancies/Two Years
03/12/2009	<input checked="" type="checkbox"/>	Lactose Intolerance

At the bottom of the window, there are fields for 'Professional Discretion High Risk', 'Professional Discretion HR Note', 'Priority' (set to 1), and 'Calculate Eligibility' buttons. The status 'Risk Ineligible' is displayed in red text.

Risk Factor Note entered on Assessment Questions displays here

Searching for risks

The Assessment Questions tab includes a search utility to quickly find a specific risk factor and its associated question. To make the search easier, you can type in just a few letters for the risk factor. Select whether the risk starts with these letters or contains the letters and click the Find button.

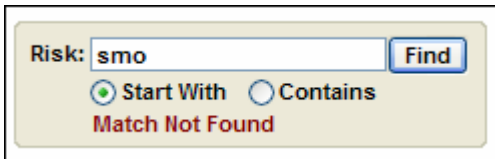


Risk:
 Start With Contains

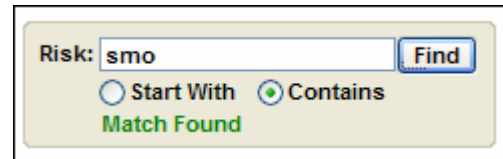
Search Field

Search results display in the search field. If one or more matches are found, the focus jumps to the first risk factor found.

For example, suppose you want to find the questions associated with smoking risks. If you search for risks starting with 'smo' there are no matches. But, if you look for risks containing the letters 'smo,' matches are found.



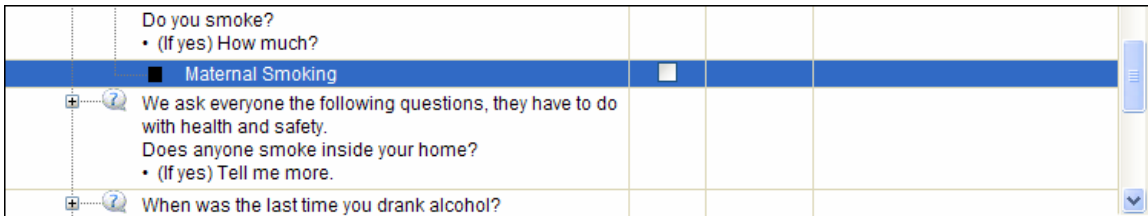
Risk:
 Start With Contains
Match Not Found



Risk:
 Start With Contains
Match Found

Search results for Smoking Related Risks

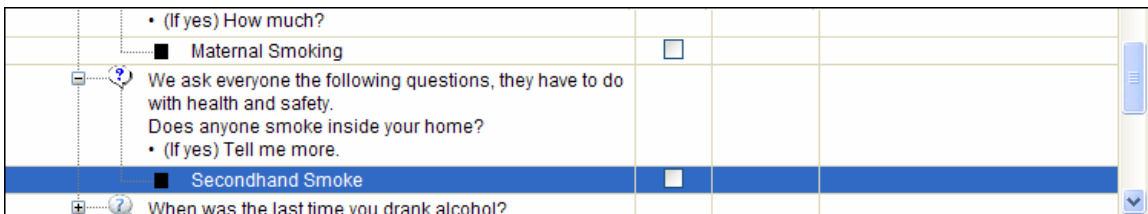
The focus jumps to the first risk factor containing the letters 'smo.' If the risks were hidden, they automatically display.



Do you smoke? • (If yes) How much?			
■ Maternal Smoking	<input type="checkbox"/>		
⊕ ? We ask everyone the following questions, they have to do with health and safety. Does anyone smoke inside your home? • (If yes) Tell me more.			
⊕ ? When was the last time you drank alcohol?			

First Found Risk


Click the Find button again to see if there are additional matches. Additional clicking of the Find button will toggle the focus between the found matches.



• (If yes) How much?			
■ Maternal Smoking	<input type="checkbox"/>		
⊖ ? We ask everyone the following questions, they have to do with health and safety. Does anyone smoke inside your home? • (If yes) Tell me more.			
■ Secondhand Smoke	<input type="checkbox"/>		
⊕ ? When was the last time you drank alcohol?			

Second Found Risk

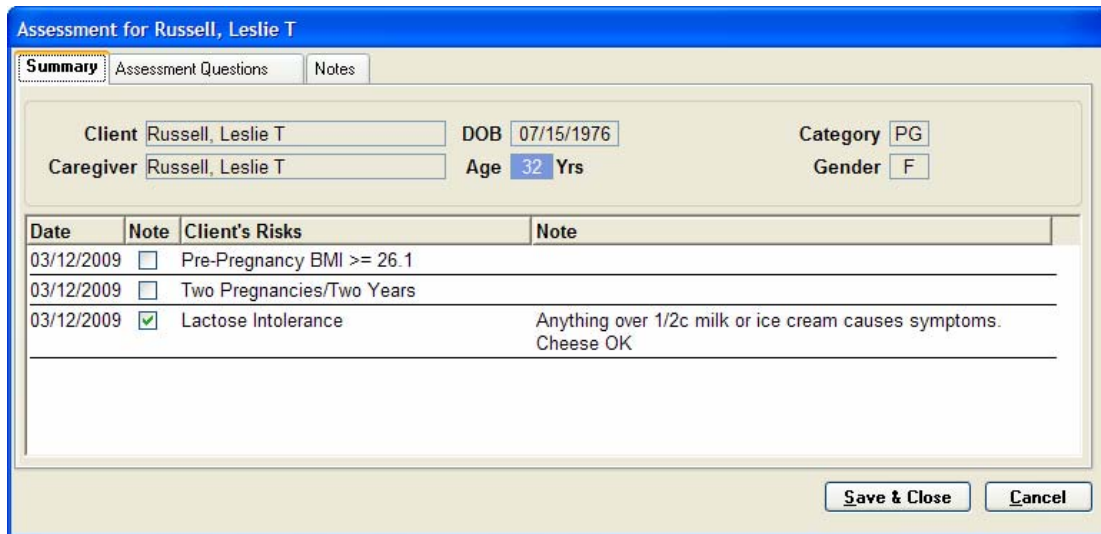
Known Issues

Using the  icon to expand lists is a new feature with this release. In most uses, the icon behaves as expected, opening and closing lists. As with any new feature, there are a few 'quirks' you should be aware of.

1. In some cases, selecting a risk factor causes the expanded list of risks to 'jump' and the selected risk is no longer visible. You'll have to scroll down the page to see the selected risk.
2. When searching for a risk, sometimes the highlighted risk is not visible. It is hidden off screen just below the visible question or risks. Again, you'll have to scroll down the page to see the risk.
3. When the Assessment Questions tab first opens, the last 2 questions are expanded to show their associated risk factors. Occasionally, if the Hide Risks button is clicked and you expand the next to the last question, you won't be able to scroll to the last question. If this happens, click the Show Risks button.

Summary tab

The Summary tab was added to the Assessment window so you can easily see all assigned risks including auto-calculated risks and other risks which may not be associated with any questions.



Date	Note	Client's Risks	Note
03/12/2009	<input type="checkbox"/>	Pre-Pregnancy BMI >= 26.1	
03/12/2009	<input type="checkbox"/>	Two Pregnancies/Two Years	
03/12/2009	<input checked="" type="checkbox"/>	Lactose Intolerance	Anything over 1/2c milk or ice cream causes symptoms. Cheese OK

Summary tab in Assessment window

The Summary tab is view-only. You cannot add, delete or edit risks or notes on this tab.

Notes tab

The Notes tab gives you access to the same Notes tab available in all wizards. It was included in the Assessment window so you can review or add notes without having to close the window.

Date/Time	Author	Title
11/04/2008 01:18 PM	Marata, Jillie	RC
06/06/2006 01:29 PM	Baxter, Hannah	RC
05/04/2006 11:41 AM	Stratos, Terri	2C note - BF

Date/Time: 11/04/2008 01:18 PM Author: Marata, Jillie
Title: RC

Just moved back to WA. Excited about pregnancy, but worried. She miscarried in TX in May. Discussed eating for health pg. snack ideas and grab-n-go meals.

Buttons: New Line, Delete Line, Save & Close, Cancel

Notes Tab in Assessment window

If you add a new note, the title automatically fills with “Assessment Questions” so you’ll know at a later date the notes were entered from the Assessment window. The title is editable; you can always change it before you save it.

Date/Time	Author	Title
01/07/2009 05:09 PM	Stratos, Terri	Assessment Questions
11/04/2008 01:18 PM	Marata, Jillie	RC
06/06/2006 01:29 PM	Baxter, Hannah	RC
05/04/2006 11:41 AM	Stratos, Terri	2C note - BF

Date/Time: 01/07/2009 05:09 PM Author: Stratos, Terri
Title: Assessment Questions

Buttons: New Line, Delete Line, Save & Close, Cancel

New Line of Notes with Title Automatically Filled

Nutrition Risk Factors

Age at Conception

The two risk factors related to age at conception are now auto-calculated by the computer.

- <= 16 years at conception
- 17 years at conception

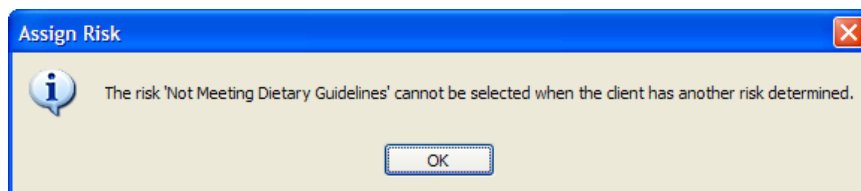
The pregnant woman's age at conception is calculated based on her date of birth on the Demographics tab and due date on the custom tab. The appropriate age risk is added to the Assessment tab as soon as the Due Date is entered. If staff change the Due Date while in the certification wizard, the risk is automatically added, deleted, or changed. Once the certification wizard is completed, the risk does not change, even if there is a Due Date change.

Not Meeting Dietary Guidelines

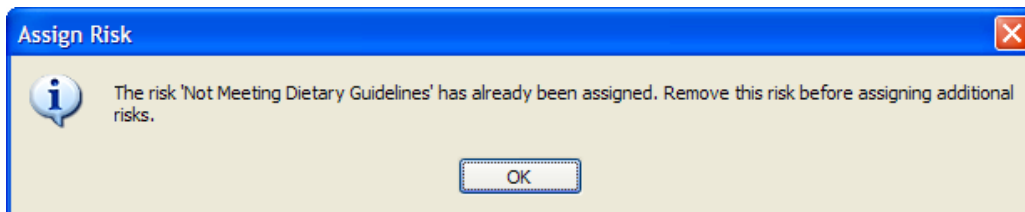
This version of Client Services will not allow you to assign one of the Not Meeting Dietary Guidelines (NMDG) risks if the client has been assigned another risk.

- Not Meeting Feeding Guideline (4 - 12 months)
- Not Meeting Feeding Guideline (12 - 23 months)
- Not Meeting Dietary Guidelines (2 - 5 years)
- Not Meeting Dietary Guidelines

During the certification, if you try to assign one of these NMDG risks after assigning a different risk, you'll get the following dialog box as a reminder:



Also, if one of these NMDG risks is assigned, you will not be able to assign another risk. You'll get the following error message:



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To remove the NMDG risk factor, uncheck it on the Assessment Questions or exclude it on the Assessment tab. This will allow you to add other risk factors on the same date as the certification.

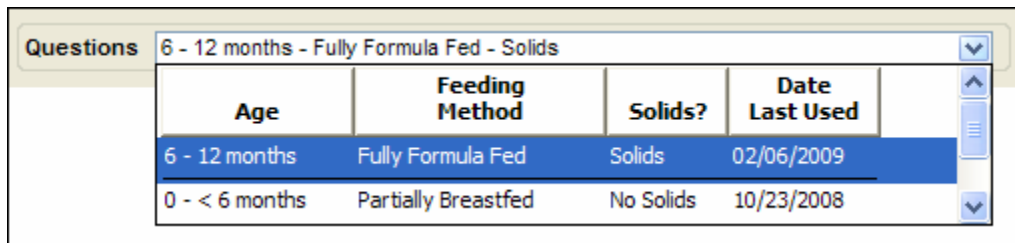
Additional risk factors can always be added at later dates.

The Not Meeting Dietary Guidelines risk factor will be automatically assigned when changing the category from Breastfeeding to Postpartum and there is no risk factor that can be carried over to the postpartum certification.

Certification and HRCP History

The Assessment Questions button is available on the Assessment tab in both the Certification History and HRCP History. Only questionnaires used for the selected certification are available. There is no change to the printed reports.

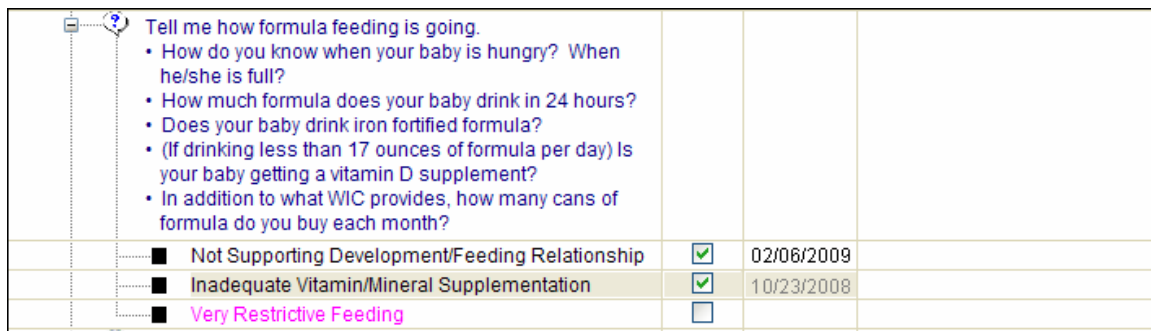
To see if or when a questionnaire was used, click the down arrow on the Questions field.



Age	Feeding Method	Solids?	Date Last Used
6 - 12 months	Fully Formula Fed	Solids	02/06/2009
0 - < 6 months	Partially Breastfed	No Solids	10/23/2008

Each questionnaire is displayed only once, along with the last date it was used. If more than one questionnaire was used during the certification period, each questionnaire is displayed along with the last date it was used.

To open a questionnaire, simply select it. You can scroll through the list of questions. Questions with assigned risk factors are automatically expanded to show you the risk, the date it was assigned, and any notes. Risks used to determine the client's eligibility are highlighted with a gray background.



<p>Tell me how formula feeding is going.</p> <ul style="list-style-type: none">• How do you know when your baby is hungry? When he/she is full?• How much formula does your baby drink in 24 hours?• Does your baby drink iron fortified formula?• (If drinking less than 17 ounces of formula per day) Is your baby getting a vitamin D supplement?• In addition to what WIC provides, how many cans of formula do you buy each month?	<input checked="" type="checkbox"/>	02/06/2009
<input checked="" type="checkbox"/> Not Supporting Development/Feeding Relationship	<input checked="" type="checkbox"/>	10/23/2008
<input checked="" type="checkbox"/> Inadequate Vitamin/Mineral Supplementation	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Very Restrictive Feeding	<input type="checkbox"/>	

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To be considered 'used,' you must make a change to a questionnaire by

- Adding or deleting a risk factor, or
- Adding, editing, or deleting a risk factor note
- And, clicking the Save and Close button then finishing the wizard to save your changes.

Opening a questionnaire and clicking the Save and Close button without making any changes to risk factors or risk factor notes does not count as using a questionnaire. Be aware that auto-calculated risk factors do not count as 'using' a questionnaire even though these risks can be seen on the questionnaire.

If no questionnaires were used during a certification period, you'll see the following message:

