Client Services 5.1

VENA

THE ASSESSMENT QUESTIONS

Leader Guide

If you want to build a ship, don't drum up people together to collect wood and don't assign them tasks and work, but rather teach them to long for the endless immensity of the sea.
~Antoine de Saint-Exupery

DOH 960-093 March 2009

Who: Participants: WIC staff members who are doing certifications, includes Certifiers, Clerk/Certifiers, RD's, Nurses etc…

Leader: Any staff person - Coordinator, RD, Certifier, Clerk/Certifier etc… or self-directed by an individual.

Why: The certification process assures that clients are assessed in a consistent manner. Nutrition services are provided in a personalized way, based on client's needs and interest identified during the assessment. Using the Assessment Questions in Client Services effectively improves documentation capabilities and enhances a client-centered interaction.

When: Schedule training prior to implementation of Client Services 5.1. Plan on training lasting between 2 - 3 hours depending on the size of the group.

Where: Training is designed for any WIC clinic, meeting room, office or other similar area.

What: By the end of this session, participants will have:

- Experienced features and functions of the Assessment Questions pop-up window.
- Viewed risk assessment and assignment using the Assessment Questions.
- Identified infant assessment questionnaires based on age, feeding method and use of solids.
- Observed client-centered rapport building skills while asking the Assessment Questions.

Materials Needed: Computer with monitor for viewing in a group (or individually) or a computer and a projector. To see and hear the video, a computer with the sound enabled is needed.

PowerPoint Presentation - Client Services 5.1 - VENA Assessment Questions

Copies of:

- Client Services 5.1 Software Changes (Release Notes) - 1 copy for each participant distributed prior to training. This provides the step-by-step instructions for all the features of the new software.
- Participant Guide - Client Services 5.1 - VENA Assessment Questions - 1 copy for each participant
- Scenarios for Presentation - 1 copy to each role-play participant (Pregnant, Child & Infant) and 1 copy for the leader
- Client Services Practice Worksheet - 1 copy for each participant

Background Reading for Leaders

Washington State WIC Manual, Volume 1, Chapter 11 - Assessment Questions & Chapter 14 - Nutrition Risk Criteria

Client Services 5.1 Software Changes (Release Notes)

Additional suggested materials

Consider providing the following to staff to supplement Client Services 5.1 training:
Washington State WIC Learner Centered In-services:

- "An Introduction to Ask, Provide, Ask"
- "Active Listening"

How:

Review all Participant Materials

a. Distribute copies of Client Services 5.1 Software Changes (Release Notes) to participants to review prior to training.
b. Become familiar with the Participant Guide, the Scenarios and Release Notes.
c. Distribute materials to participants at training event.

Prepare for Training

a. Review Release Notes prior to training to become familiar with the features in 5.1.
b. Review all Leader materials along with recommended background information listed on page 4 in the Leader Guide.
c. Review the Leader Guide and the PowerPoint. Advance the PowerPoint slides as directed in the Leader Guide.
   - The first few slides have animations that advance the slides automatically.
   - The PowerPoint contains a video. The video includes sound which you will want to make sure plays on the computer used to train. If you have problems with this feature please contact CIMS Support.
d. Gather materials in list on page 3 of this Leader Guide.

Provide the Training

a. The Leader Guide is <u>your</u> guide. A script of the words to say are the words written in *italics*. Participants can follow along using the Participant Guide. They will have the same information the leader has, without the directions or script included for the leader.
b. Advance the PowerPoint slides as directed in the Leader Guide script.
c. Place the role-playing staff near the computer screen to allow participants to see the staff and the screen at the same time.

A training on using the VENA Assessment Questions in Client Services version 5.1.

AGENDA

Times noted are approximate

Introduction and Warm-Up (20 minutes)

- Review of objectives
- Warm-up activity

Part 1 - VENA and Client Services 5.1 (5 minutes)

- Read and listen
- Share what is interesting to you

Part 2 – VENA Meets CIMS – A Presentation (25 minutes)

- View PowerPoint Presentation (slides 1-16)
- View Wake the Dream video (slide 17)

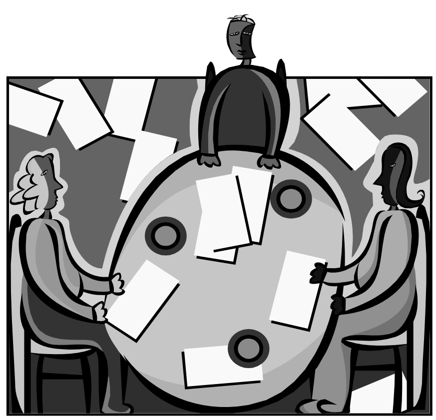
Part 3 – Using the Assessment Questions (45 minutes)

- Continue viewing PowerPoint presentation (slides 18-41)
- View and participate in role-play presentation

Part 4 – Making the Connection! (5 minutes)

- An activity about what you have experienced
- Share your thoughts with the larger group

Closing (5 minutes)



Introduction/Warm-Up	**15 minutes**

*Today's training is an opportunity to **engage** in the topic of VENA, **explore** the Assessment Questions in Client Services 5.1, and **discover** strategies for successful client interactions.*

By the end of this session you will have:

- *Experienced features and functions of the Assessment Questions pop-up window.*
- *Viewed risk assessment and assignment using the Assessment Questions in Client Services 5.1.*
- *Identified infant assessment questions grouped by age, feeding method and use of solids.*
- *Observed client-centered rapport building skills while asking the Assessment Questions.*

Warm-up Activity	**5 minutes**

***Think** about how you use Washington WIC's standardized Assessment Questions now. **Picture** yourself doing a certification and using the Assessment Questions. Now **imagine** using the Assessment Questions in CIMS.*

*When I say "Go", break into pairs or trios and take turns **telling** your partner(s) how having the Assessment Questions in Client Services will make a difference in the conversations you have with your clients.*

We will hear a sample from each group.

Allow time for discussion. Call the group back after 4 minutes.

Who would like to share?

Part 1	**5 minutes**

VENA and Client Services 5.1

Listen as I read the following information about VENA and the Assessment Questions. Note what is interesting to you.

VENA (Value Enhanced Nutrition Assessment) is part of the larger process known as Revitalizing Quality Nutrition Services. The goal of VENA is to improve nutrition services in the WIC Program by establishing standards for the assessment process. This standardization assures that clients are assessed consistently and fairly while maintaining personalized services according to the client's needs and interests.

Client Services 5.1 was developed based on the knowledge that WIC staff are busy and care about providing quality nutrition services to their clients. The addition of the Assessment Questions to Client Services is exciting for many reasons… easier risk assignment, improved documentation, new auto-calculated risks, questions that are no longer on paper and more. These improvements are designed to allow you more time for better conversations with your clients.

Invite the group to share their comments.

What did you hear that feels exciting to you?

Part 2 **25 minutes**

VENA Meets CIMS - A Presentation

*Now, we will be watching an overview of **highlights** in 5.1, following this overview we will see **a short video** and then participate in a **role-play** using scripted scenarios.*

***Watch** as we view this PowerPoint presentation highlighting the new features in version 5.1.*

Begin the PowerPoint presentation. Show **slides 1-16**. Note: Some slides have automatic animation, advance slides once all animation has stopped and the group has finished reading. These slides were designed to be shown without additional explanation and as an overview of the changes in Client Services 5.1. Additional details follow in later slides.

This was an overview of the changes included in Client Services 5.1. Please be sure to read the Client Services 5.1 Software Changes (Release Notes) you've been given for a more complete look at the changes.

Show **slide 17**.
The PowerPoint gave us a look at how VENA has changed Client Services. The more important changes that VENA brings are changes to the actual services provided to our clients. What is VENA beyond just adding standardized questions to the certification process? Keep that in mind as we watch this video together.

On slide 17, click on the video "Wake the Dream". The video is approximately 4 minutes and includes sound.

Invite discussion about the PowerPoint and video.
In what ways does this video have you thinking about VENA differently?

Return to the PowerPoint presentation.

Part 3 **45 minutes**

Using the Assessment Questions

We have just seen some of the features of Client Services 5.1, and viewed the video, "Wake the Dream." Now, let's take a more detailed look at the Assessment Questions and do some role-playing of client-centered interactions that can ultimately help us to "Wake the Dream" for our clients.

Who would like to read the following excerpt from Volume 1 of the Policy and Procedure Manual, Chapter 11 - Assessment Questions? Pay particular attention to how the Assessment Questions are part of our conversations with clients. We will hear your comments.

> 1. *The CPA shall assess the client's health and nutrition status by using the Washington State WIC Nutrition Program's Assessment Questions during the initial certification and subsequent certifications. The CPA shall also use the Assessment Questions for the mid-certification infant health assessment.*
>
>   a. *The CPA shall ask the client/caregiver the Assessment Questions.*
>
>   ***Note:*** *The assessment process is meant to be a conversation with the client/caregiver.*
>
>   b. *The CPA shall be allowed to ask the Assessment Questions in any order.*
>
>   c. *The CPA shall be allowed to "use his/her own voice" when asking the Assessment Questions, provided the intent of each question is not changed.*

What are your comments about what we just heard?

The next activity involves a **role-play of scripted scenarios**. There are 3 scenarios. Each includes a clinic staff person and a client. A minimum of 2 volunteers or up to 6 pairs are needed to read these role-plays.

I need volunteers for the next activity. Who is willing to read a role-play script?

I will ask you and your partner to role-play the parts of client or staff. We will ***learn*** *about the functionality of Client Services 5.1* *<u>and</u>* ***observe*** *client-centered interactions. These examples show the features of Client Services 5.1 as it works as part of certification appointments.*

We will ***watch*** *just a <u>part</u> of a certification and* ***see*** *the staff person ask a few of the Assessment Questions to the client. The staff person (role-playing the certifier) will sit at the computer and advance the slides for us as if recording information in Client Services. You will* ***hear*** *how the questions are asked in the <u>voice of the staff person</u>. The slides are designed to "****show****" how Client Services 5.1 works during certification appointments. You'll see the certification information displayed on the screen. We will see a summary of the features included in each scenario and will have an opportunity to discuss what we see.* ***Be sure to sit where you can see our client, the staff person and the screen.***

Decide *who will be the <u>client</u> and who will be the <u>staff</u>. If it helps you to decide - people with a middle initial between letters A-M read the client part and people with a middle initial between letters N-Z read the staff part.*

What questions do you have?

The beginning of each scenario includes a slide summarizing what you will be observing. During the role-play, the slides reflect how Client Services 5.1 works. After the role-play, a slide summarizes what has been shown during the role play.

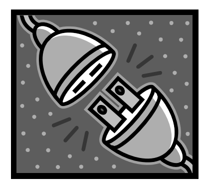
Begin the second part of the presentation, starting with **slide 18**. Ask the role-playing pair with the corresponding scenario to begin. Continue through the 3 scenarios and showing the PowerPoint presentation. Allow time for discussion after each scenario. The scenarios end at **slide 40**. After the presentation at slide 41, bring the group back together for any discussion, questions and/or review of the Release Notes for further clarification.

Thank you for participating in this presentation. I appreciate your great role-playing skills and believe this helped us all to learn together about the VENA Assessment Questions.

Let's share as a group any questions or comments you have. We will take about 5 minutes to hear your comments.

Part 4	**5 minutes**

Making the Connection



Reflect *on your experiences today and* ***imagine*** *yourself using the Assessment Questions in Client Services. With a partner(s)* ***name*** *one thing that you see yourself doing differently. How will this change the conversations you have with your WIC clients?*

We will hear a sample.

Allow 3 minutes for staff to share in pairs or trios. Allow 2 minutes for people to share what they named with the larger group.

Who would like to share?

Closing	**5 minutes**

Thanks for participating today. We heard some great discussion and new information that will help us enhance our interactions with our WIC clients.

Please use the next few minutes to fill out a Feedback Form.

Feedback Forms are for the leaders use only. The information you collect can help you determine if follow up is needed and/or if there are future needs for staff in learning about VENA 5.1.

Collect & review participant's Feedback Forms.

IMPORTANT!

1. There is not a way to have a "practice" client.

2. The intent of this practice worksheet is to guide you in viewing key functions before you start using it with clients today.

3. Be careful not to make any changes in a client file to ensure data integrity for your clients.

4. You will be able to see how the Assessment Questions window and tabs work and it will be very important to select Cancel when leaving the window. When you select Cancel, changes will be NOT be saved in the clients file.

5. Use your <u>Client Services 5.1 Software Changes (Release Notes)</u> as a guide for additional information.

6. If you have questions about this activity please contact: CIMS Support at 1-800-841-1410 x 7.

Take some time to get acquainted with the features of Client Services 5.1.

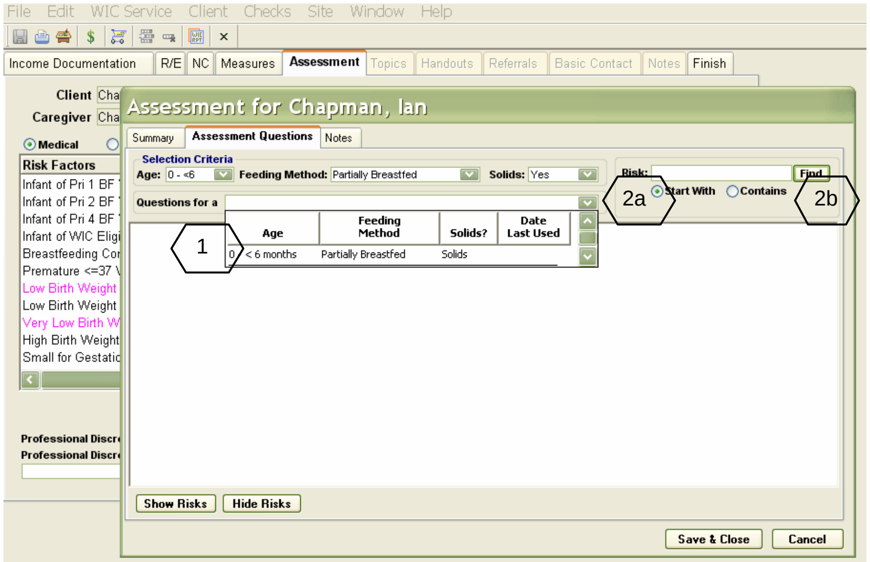
1. Open Client Services 5.1 (CIMS). Select a client from your schedule for the day.

2. Use Change Cert Info from the WIC Service dropdown on the toolbar to view the Assessment Question window.
    - In the Change Cert Info wizard, go to the Assessment tab (this used to be the Assess Risk tab).
    - Click on the Assessment Questions button – it's available from the Assessment tab in any wizard.

3. Use the following information to guide you as you view the Assessment Questions in the Assessment tab.

4. <u>Do not finish the wizard</u>, instead close without saving changes.

Assessment Questions Window



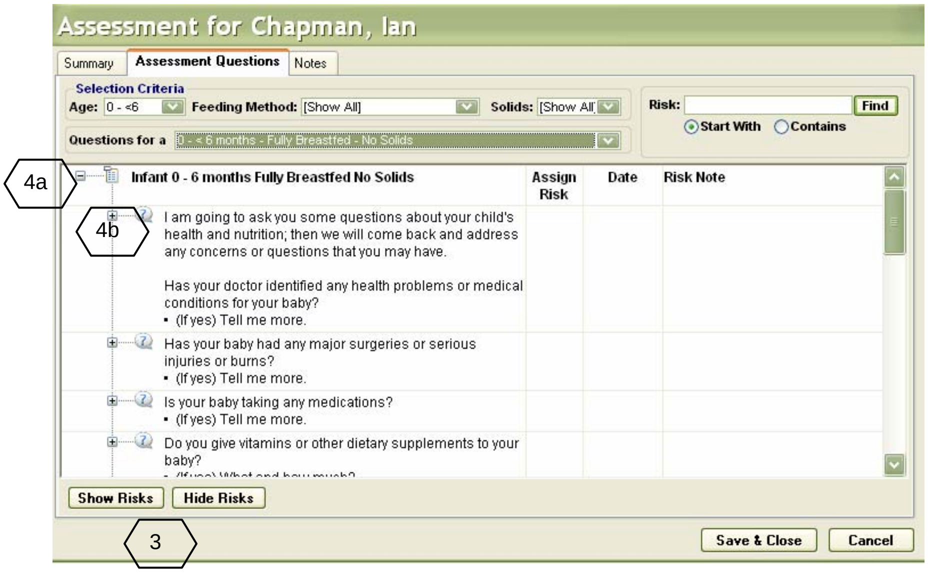
Explore the following features of Client Services 5.1:

1. **Selection Criteria drop-downs for infants**

   The infant's current age is automatically selected. All of the question lists for that age group appear. Choose from this list or limit the number of question lists by assigning another age group or select, feeding method and whether or not solids are given.

2. **Risk search to find a specific risk and question**

   Select the (a.) Starts With radio button to find the first word in a risk name. Search additional risks using the same letters, press find again and again until reaching the correct risk. Select the (b.) Contains radio button and type in the Risk box. The word or letter combination in the box will be highlighted in the risk list below.



3. Show Risks/Hide Risks

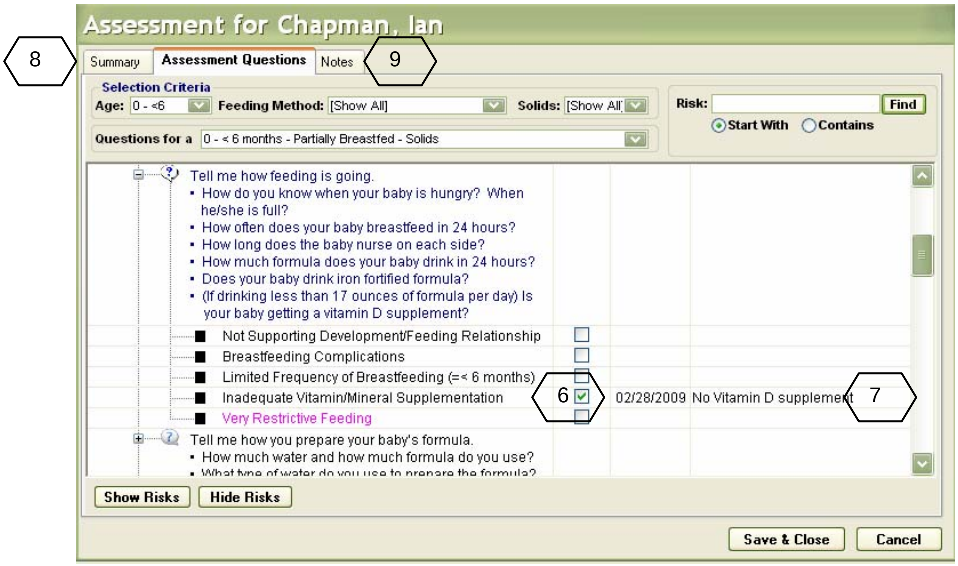
When the question list is displayed, choose Show Risks to see all risks or Hide Risks to see only the questions.

4. + and – boxes or Tree View

(a.) Select + or – box next to each question to display the risk for an individual question (or the (b.) - at the top of the question list to hide all the questions).

5. Risks without associated questions

Notice that the risks from the bottom of the list which don't have associated questions are available whenever the Assessment Questions window is open even when Hide Risks is selected. (These are the risks dealing with a client's social situation, substance abuse, homelessness etc.) The risks for linking infant's and mother's priorities are found here as well.

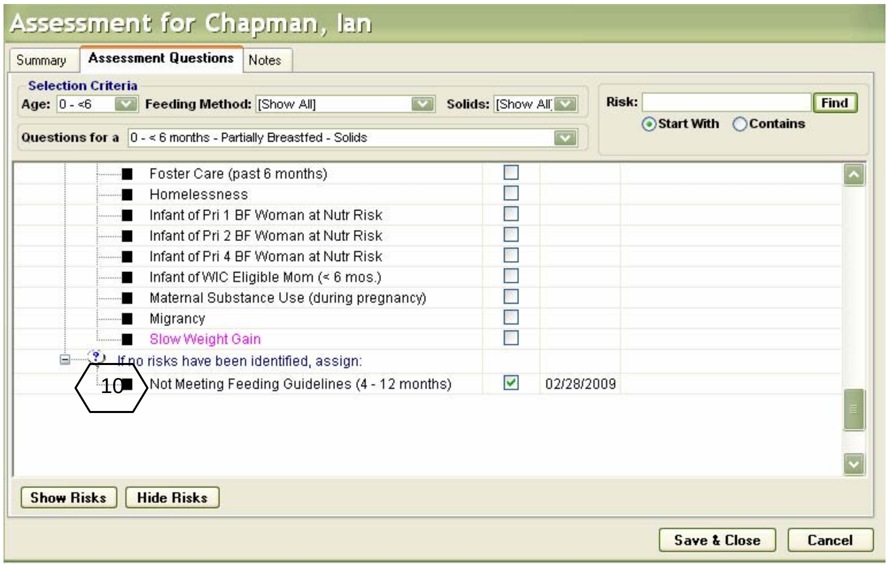


6. **Assign risk**
   During an assessment check the box to assign a risk, you can see there is an individual box for every risk. Any assigned risks will show on both the Assessment Questions window and the Assessment tab. All assigned risks display on the Assessment tab, whether selected from the Assessment Questions window or selected directly on the Assessment tab.

7. **Risk Note**
   If a note is needed you can write a note in the Risk Note box about an assigned risk. The risk note will appear next to the assigned risk on the Assessment tab. Risk notes work the same here as they do on the Assessment tab.

8. **Summary Tab**
   Click here to see any assigned risks.

9. **Notes Tab**
   This tab is the same tab as the Notes tab at the end of the wizard. You can add and view notes at either location.



10. Not Meeting Dietary/Feeding Guidelines

These risks can only be assigned by themselves. Client Services 5.1 will not allow you to assign this risk once any other is assigned.

11. Reminder to provide breastfeeding information to pregnant women

Remember, every pregnant woman needs to have the opportunity to learn more about breastfeeding. Please discuss how your clinic will continue to assure pregnant women are asked about their plans to breastfeed.

Note: there was a sample question on the bottom of the paper Assessment Questions that could be used at anytime during the certification. This question was “What have you heard about breastfeeding?” Because there is no question or risk about this, the reminder and sample question is not included on the Assessment Questions window, but it is still a requirement to ask every pregnant woman about her plans to breastfeed.

Enjoy Version 5.1 - VENA The Assessment Questions!