



CASCADES PARTICIPANT SEARCH

Office of Nutrition Services/WIC



Topics

- Reasons why a thorough participant search is required
- Questions to ask when conducting a participant search
- Identify how to search for participants in Cascades
- Decide when to create new participants
- Identify icons in Cascades that could indicate other records
- Learn what to do when you find existing participants
- Possible reasons a participant's file is missed when searched

Why conduct a Statewide Family Search before adding a new participant?

- Initial screening and documentation requirements, listed in Volume 1, [Chapter 3 – Application and Processing Standards](#), section 3.
- To avoid creating a duplicate record.
- To prevent duplicate benefit issuance and prevent children being added who aren't in the household.
- See slide 13 for what to do if you find an existing participant.

What to ask before adding a new participant

Have you or any family members been on or applied for WIC in Washington state before?

- ❖ If yes, use the following bullets to identify past participants in Cascades:
 - ✓ Ask if they have **applied** for WIC using any other names. *For example, if someone recently got married, search for the previous and current last names.*
 - ✓ Complete a statewide search with all possible last name variations, with and without date of birth.
 - ✓ When searching hyphenated names add a space or hyphen.
 - ✓ Complete a broader name search. *For example; last name is Woodson – conduct a search with “Woo” and ensure the last name box is unchecked in Cascades to allow for a broader search.*

- ❖ If no, a statewide search is still required in Cascades. *The above clarifying questions may assist you when searching in Cascades.*

When Doing a Statewide Search

- Reflect to the applicant/participant their full name and spelling.
 - When you search with a hyphenated last name you must put a space or the hyphen between the two last names to conduct an accurate search.
- Reflect to the applicant/participant their date of birth – confirming you heard it correctly.
 - Cascades uses Month/Date/Year. Persons in the military or from another country may use another date format which can cause incorrect entries into Cascades.
 - For example: *applicant says: “my date of birth is 2/11/1990.” You reflect: “So your birthday is February 11th, of 1990, correct?” and then input 02/11/1990 into Cascades.*

Search for New Participants

The screenshot shows the 'Cascades WIC Application' interface. The 'Family Services' menu is open, with 'Family Search' highlighted. A red arrow points from 'Family Search' to the 'Search Criteria' section. In the 'Search Criteria' section, the following options are highlighted with red boxes: 'State-Wide' under 'Search Location', 'Family' and 'Participant' under 'Search Type', and the 'Active Only' checkbox. The search criteria form includes fields for Family ID, Last Name, First Name, M.I., Telephone Number, Date of Birth, Participant ID, Medicaid Number, and EBT Card Number. There are also checkboxes for 'Online Applicant Only' and 'Active Only'. 'Search' and 'Clear Criteria' buttons are at the bottom right.

When conducting a search:

- Select **State-Wide** under Search Location,
- Check **Family** and **Participant** under **Search Type**,
- Uncheck **Active Only** box,
- Consider using one or multiple Search field entries:
 - Use the applicant's last and first name. There could be a discrepancy in how the name was entered into Cascades. *For example, a last name was misspelled so you may want to confirm the spelling (see previous slide) or conduct a broader search (see next slide).*
 - *Middle initial,*
 - *Date of birth* – if you think it may narrow the search.

Participant Search Results – Status Column

Search Results Total Items: 7424

Presentation last saved: Just now

Fac	Na	First Ni	M.I.	Date of Bi	Cate	Medic	Status	Certification End Date	Agency
F00300000782	WA0030001351	JON	BRO	9/4/2017	C		Certification Expired	9/30/2021	L02 - Asotin County Health District
F00300000782	WA0030001352	JON	CHA	12/10/2017	C		Active/Certified	12/31/2021	L02 - Asotin County Health District
F00300000807	WA0030001542	JON	RAI	B 4/8/2021	I		Active/Certified	4/30/2022	L02 - Asotin County Health District
F00600004952		JIM	ANG	2/11/1987					L03 - Benton Franklin Health District
F00600004952	WA0060008693	JIM	ANG	2/11/1987	P		Certification Expired	10/31/2020	L03 - Benton Franklin Health District
F00600004952		JIM	ANG	2/11/1987					L03 - Benton Franklin Health District

- Please pay attention to the **Status** column, once search results display.
- Refer to slide 4 about what to do when an Active/Expired participant exists in your clinic and in another clinic.

To Conduct a Broader Search

The screenshot displays a search interface with two main sections: 'Search Criteria' and 'Search Results'.

Search Criteria:

- Search Location:** Radio buttons for 'State-Wide' (selected), 'Local Agency', and 'Clinic'. A dropdown menu shows 'Washington State WIC'.
- Search Type:** Checkboxes for 'Family' (checked), 'Participant' (checked), 'Caretaker', and 'Proxy'.
- Family ID:** Text input field.
- Last Name:** Text input field containing 'Joo'.
- First Name:** Text input field containing 'All'.
- M.I.:** Text input field.
- Telephone Number:** Text input field with a format '() - -'.
- Date of Birth:** Text input field with a calendar icon.
- Participant ID:** Text input field.
- Medicaid Number:** Text input field.
- EBT Card Number:** Text input field.
- Filters:** Checkboxes for 'Online Applicant Only' and 'Active Only'.
- Buttons:** 'Search' and 'Clear Criteria'.

Search Results:

Total Items: 220

	Family ID	Participant ID	Last Name	First Name	M.I.	Date of Birth	Cat	Certification
	F13400002612		JOH	ALL		6/28/1983		
	F13400002612	WA1340004758	JOH	ALL		6/28/1983	P	
	F15700002768		JOH	ALL	R	4/7/1993		
	F15700002768	WA1570004784	JOH	ALL	R	4/7/1993	N	
	LF10113948		Joh	All		8/10/1991		
	LF10113948	LWA10119423	Joh	All		8/10/1991	P	
	LF11185269		Joh	All	C			
	LF117913295		Joh	All	T	9/25/1994		
	LF117913295	LWA117924732	Joh	All	T	9/25/1994	B	

When conducting a broader search:

- Input the first few letters of last or first name and select the **Search** button.
- Sort the **Search Results** by clicking on a column header.
- Sorting the results by name or date of birth may help identify a match quickly.

Search Results and Transfers

- If the applicant/participant already exists in Cascades, they will display in the **Search Results**.
- View the **Status Column** to see if they are Active/Certified.
 - Verify that the parent/guardian matches if the applicant/participant is an infant/child.
- If you find the applicant/participant already in Cascades, please refer to the Cascades steps, [Foster Care & Transfers section](#).
- If you need help, call Cascades Support at 1-800-841-1410, ext. 3, ext. 2

Search Criteria

Search Location: State-Wide, Local Agency, Clinic

Search Type: Family, Participant, Caretaker, Proxy

Family ID: [], Last Name: Johnson, First Name: [], M.I.: [], Telephone Number: []

Date of Birth: [], Participant ID: [], Medicaid Number: [], EBT Card Number: []

Online Applicant Only: Active Only:

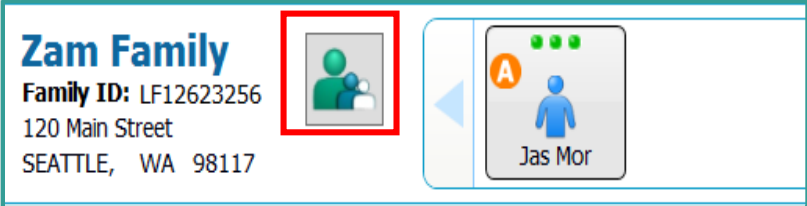
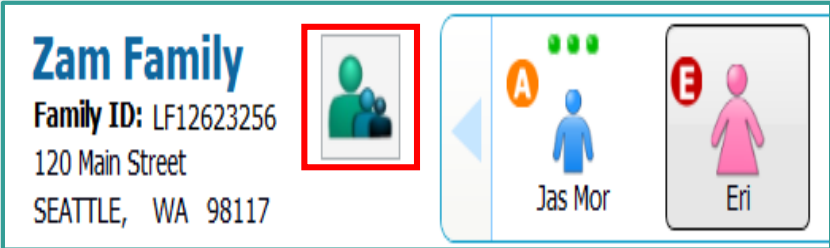
Washington State WIC [v]

Search [] Clear Criteria []

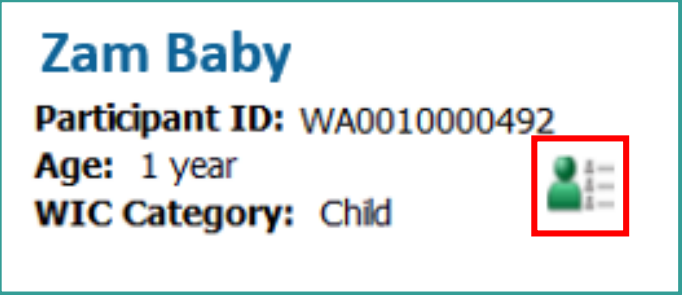
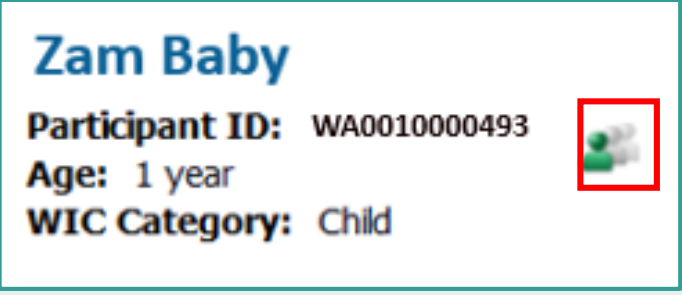
Search Results Total Items: 6

	Family ID	Participant ID	Last Name	First Name	M.I.	Date of Birth	Cate	Medic	Status	Certification End Date	Agency
	F1010000921		JOHNSON	MIKA		8/10/1990					L35 - Public Health Seattl
	F16900003668		JOHNSON	SUSAN		9/30/2001					L45 - Snohomish Health D
	F16900003668	WA1690006352	JOHNSON	SUSAN		9/30/2001	B		Active/Certified	6/30/2022	L45 - Snohomish Health D
	F16900003668	WA1690006354	JOHNSON	TEDDY		6/5/2021	I		Active/Certified	6/30/2022	L45 - Snohomish Health D
	F1010000921	WA1010001663	JONSON	MIKA		8/10/1990	P		Active/Certified	5/31/2022	L35 - Public Health Seattl
	F22400001839		JOH	APR	N	2/7/2003					L35 - Public Health Seattl

Helpful Icons in Cascades

Icon	Explanation
	<p>Look at the family icon, notice the white outlined participant in the front of the family icon. This is referred to as a “Ghost participant” and indicates that there are family members who aren’t in an active status, such as an Expired, Terminated, or Deceased participant.</p>
	<p>By clicking the family icon, all members of the family who have been participants at some point in time display in the carousel. Notice how the family icon changes when displaying all previous participants in the family.</p> <p>In this example the ghost participant has an Expired status (notice the icon with the red circle and a white E). Use this participants Expired file to complete a Subsequent Certification rather than start a new file for this person.</p>

Helpful Icons in Cascades (cont.)

Icon	Explanation
 <p>Zam Baby Participant ID: WA0010000492 Age: 1 year WIC Category: Child</p>	<p>This icon shows that there are other files for this individual, and they are linked together.</p> <p>If you see this icon, then you are using the primary file for the participant. When you hover your cursor over the icon, messaging tells you this is the primary individual.</p>
 <p>Zam Baby Participant ID: WA0010000493 Age: 1 year WIC Category: Child</p>	<p>If you see this icon, you're seeing the duplicate file that is linked to the primary file.</p> <p>If you see this icon, you can select the green person icon to open all linked records. Select the Primary file and use that to apply for Subsequent Certification.</p>

Possible Duplicate Participant

- When you select the **Add** button when creating a new participant, the **Possible Duplicate Participant** pop-up may display. Ask the person questions to clarify/confirm if this is the same applicant/participant.
- If the record belongs to the person you are working with, or wanting to add, select the **Open Selected Family** button.
- If the record doesn't belong to the person you are working with, or wanting to add, select the **Create New Client** button.

Home Family Services Scheduling Operations Finance Administration Help Logout

Family Foster Family

Possible Duplicate Participant for SHAINA WOOD

The information entered has matched some possible existing records in the system. Please review the list of matches and ensure that the applicant is not already enrolled in the system. If you wish to continue with saving the new applicant please press create new client; otherwise, select an existing record to open. You may also cancel and return to the main menu.

Participant ID	Name	Alias	Maiden Name	Date of Birth	Gender	Ethnicity	Status
WA2270001515	SHAINA WOOD			2/10/1986	F	Non-Hispanic	

Family ID: F22700000767
Race: White
Parent/Guardian1 Name: SHAINA M. WOOD
Parent/Guardian2 Name:

WIC Category: Pregnant
Status: Active/Certified
Caretaker Name:
Mailing Address: 123 JAMES RD., SHELTON, WA 98584
Medicaid ID:

Open Selected Family Create New Client Cancel

Add Participant

Last Name: WOOD First Name: SHAINA M.I. Suffix Date of Birth: 2/10/1986

Proof of Identification: COVID-19 Category: Breastfeeding woman

Add Clear

Participant/Family Exists in Cascades System

Participant is in your clinic:

- When an active participant exists use the active record.
- If only an inactive (expired and ineligible) record exists, complete a subsequent certification using the inactive record.

Participant is in another clinic:

- When an active participant exists, you transfer them to your clinic to keep their history.
- Transfer the whole family regardless of benefit status, when possible.
- When an expired participant exists, and you cannot transfer a family:
 1. Create a new participant record in your clinic and,
 2. Request Cascades Support to link the old, expired record from the other clinic to the new, active record in your clinic. *Cascades Support – 1-800-841-1410, ext. 3, ext. 2*

Possible Reasons a Participant's Existing File isn't Found

Here are common reasons staff miss an existing file:

- Names with/without a hyphen (*when a space is used for the hyphen Cascades will include the hyphenated names*),
- Mistyped date of birth,
- Misspelled names,
- Passing over the **Possible Duplicate Participant** pop-up message,
- Someone has a new last name, due to marriage, divorce, or any other reason.

Thank you!

Your work matters; you can impact the continuity of care we provide to participants.

- ❖ Conducting a statewide search helps prevent creation of duplicate records.
 - Not creating a duplicate record helps prevent the participant from dual participation and a potential program violation.
- ❖ When possible, we want to keep an existing participant's record.
- ❖ When you're questioning a possible duplicate record reach out to Cascades Support *at 1-800-841-1410, ext. 3, ext. 2*
- ❖ Clear communication is important – remember to use the language line when needed.



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