

Training Supplement

Unit 4

MANAGE CARE PLAN AND ISSUE BENEFITS

MY NOTES	
MY QUESTIONS	

3 Things I Saw or Read to Discuss at My Clinic

1.		
2.		
3.	•	

Other Topics to Bring Back to My Clinic

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For persons with disabilities, this document is available on request in other formats. To submit a request, please call 1-800-841-1410 (TDD/TYY 711).

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About this Supplement

We created this Training Supplement as a reference to help you organize new topics, computer functions, and information you'll need that's specific to Washington WIC. We'll share tips and tools for continuing the warm and welcoming WIC services you offer to all WIC families in Washington while changing to a new system.

Please note the Computer Based Trainings (CBT) are only used to explore and practice using Cascades. Some scenarios in the CBT don't necessarily reflect state policies and procedures. Also, some content in the CBT and in the Cascades Sandbox may look different once you use Cascades after your clinic's rollout date. For example, some Nutrition Education topics or Goal choices may look different.

We hope we highlighted key areas for you, shed some light on some of the ways your work will be changing, and helped begin conversations with your co-workers as you bring Cascades to your clinics.

Simulation TIPS!

- 1) Be very, very accurate with your cursor when the instructions ask you to click on a certain part of the Cascades page.
- 2) Spell words exactly as you are instructed to type them—watch for extra spaces and spelling.
- If you need to take the simulation again, click on the "Simulation Instructions" in the Table of Contents (right).
- 4) If you want to view specific content again, click on the Slide Title in the Table of Contents (right).

About this Unit

In this unit, you'll learn the steps to complete a care plan, create a food prescription, and issue benefits to participants Ginny and Julio.

As mentioned in Unit 3, Washington WIC <u>requires</u> the care plan and issue benefits steps in a certification—even though they <u>aren't marked</u> with the star symbol in the Cascades Quick Links column.

Because this Unit covers two distinct topics, we organized this supplement differently than our other supplements. We divided this supplement into two sections, <u>Care Plan</u> and <u>Issue Benefits</u>. You'll find new terms and definitions, deeper dives into new features, policy topics, WIC Connects suggestions, and tools integrated into both sections, as they apply.

Care Plan

Cascades offers a special area just for documenting nutrition assessments, nutrition education, goals, and referrals. It's called the Care Plan. This is new to us, and provides a dedicated place where you can see participants' nutrition education progression.

Terms and Definitions

New System-specific Words or Definitions						
Care Plan	• A set of Cascades screens for nutrition education,					
	goal setting, referrals, and nutrition assessment.					
	• Client Services used the Flowsheet as the Care Plan.					
	 Cascades doesn't have a flowsheet. 					
Nutrition Assessment	• A large field on the Care Plan Summary screen					
	where staff document nutrition assessment notes at					
	either the family or individual level.					
	RD's document the Nutrition High Risk Care Plan in					
	the individual participant's Nutrition Assessment.					
	Staff document the Breastfeeding Review in the					
	family's Nutrition Assessment.					
	• The Nutrition Assessment field is like the Notes Tab					
	in Client Services.					
Nutrition Education	• Individual = One-to-one nutrition education, like the					
Methods	second contact (2C) appointment in Client Services.					
	• Group = Group nutrition education, or class.					
Nutrition Education Topic	A one or two word description of your nutrition					
	education conversation.					
Schedule	Select a Nutrition Education Topic for an individual and					
	press Schedule to save the topic for the future.					
Complete	Mark a Nutrition Education Topic complete to					
	document it in the participant's or family's file.					
Refuse	Mark Refuse when a participant or family refuses					
	nutrition education. (See policy section below.)					
Goal	The behavior change the participant or family has					
	identified.					
Family Goal	Next steps that apply to the family.					
Individual Goal	Next steps which apply only to one participant.					

New Ways to Look at Common Features: The Care Plan

NUTRITION ASSESSMENT

Where to Enter Nutrition Assessments?

The Nutrition Assessment section is located in the Care Plan Summary Quick Links tab.





NUTRITION EDUCATION AND GOALS

A big difference between Client Services and Cascades is the location of nutrition education screens. It might seem odd at first to press the Certify button and then continue on with the Care Plan. As you become more familiar with Cascades, you might find this flow to your certifications works even better than in Client Services. Nutrition Education and Goals are located where you can easily keep the focus on nutrition topics and goal setting. As you explore the Care Plan in Cascades you'll see some features to help you document participant information related to their own behavior change goals.

NOTE: You'll see different nutrition education topics and goals in Washington WIC's version of Cascades than you are seeing in this training module.



How to Document Nutrition Education

Like in Client Services, you'll document nutrition education topics discussed with the participant. In Cascades, you'll see check boxes to document nutrition education topics for the individuals in the family. You'll also see two buttons—one to schedule an education topic and one to mark the topic as completed. However, using check boxes alone, leaves out the details of your conversation. Use a combination of check boxes and comment boxes to capture robust documentation.

Cascades helps you document nutrition education:

- Use the check boxes to mark off completed education topics or to schedule topics to discuss or reinforce in future appointments.
- Use the **Method** dropdown list to document if the topic was covered one-on-one or in a group setting.

Nutrition Education Topics								
Торіс	Method /	ul WIL	AI PANTHIP	ΑΤΤΗΑΡΑΚ ΡΑΝ	ТНІР	MATT DILLON	URAI PANTHIP	
Fruits/Vegetables		1						
Health Snacks	· · · ·	<u>ן</u>	2					
Nutrition and Dental Health	· ·]						
Physical Activity	· · · ·	<u>ן</u>						
Reinforcement Counseling		ן						
Shop Smart/Meal Planning		ן						
Sugar/Artificial Sweeteners		ן						
Vegetarianism/Complementary Proteins	-]						
Vitamins/Minerals/Dietary Supplements		<u>ן ר</u>						
							Schedule Comple	te

 If you've scheduled topics for future appointments, return to the topic by clicking on the *icon* or double-clicking on the topic in the Topic Status container.

•1	Тор	pic S	Sta	tus						(?)
9	Sea	arch	Ву	Family Member ALL						
									Tota	al Items: 10 🕜
				Торіс	Individual Name	Method	Status	Scheduled Date	Completion Date	Missed Date
	0	? >	<	WIC Health - Strong Kids	WILAI PANTHIP	Online/Internet	Completed		5/3/2018	
	0	• >	<	Shop Smart/Meal Planning	WILAI PANTHIP	Online/Internet	Completed		5/3/2018	
	0	1	ĸ	Food Pyramid/Health Food Choices	WILAI PANTHIP	Online/Internet	Completed		5/3/2018	
	0	• >	ĸ	Health Snacks	WILAI PANTHIP	Online/Internet	Scheduled	5/3/2018		
		1 >	<	Fruits/Vegetables	WILAI PANTHIP	Online/Internet	Completed	5/3/2018	11/26/2018	
	0	1 >	¢.	Breakfast	WILAI PANTHIP	Online/Internet	Completed		11/26/2018	
	1	2 5	1	Carbohydrate/Protein	WILLAT PANTHIP	Online /Internet	Scheduled	11/26/2018		

• In the Topic Status Update box, add any comments and change the Status to Completed. You can return to the topic and add more comments anytime.



• Sort education topics by family member, method, status of topic completion or status date, including missed date.

Search by family Hember AL										
Topic Individual Name Hethod Status Scheduled Date Completion Date Historia										
🥒 🗙 Breakfast		WILAI PANTHIP	Online/Internet	Completed		11/26/2018				
Health Snacks		WILAI PANTHIP	Online/Internet	Completed	5/3/2018	11/26/2018				
Fruits/Vegetables		WILAI PANTHIP	Online/Internet	Completed	5/3/2018	11/26/2018				
🧷 🗙 WIC Health - Strong Kids		URAI PANTHIP	Online/Internet	Completed		5/3/2018				
Fruits/Vegetables		URAI PANTHIP	Online/Internet	Completed	5/3/2018	5/3/2018				
Food Pyramid/Health Food Choices		WILAI PANTHIP	Online/Internet	Completed		5/3/2018				
Shop Smart/Meal Planning		WILAI PANTHIP	Online/Internet	Completed		5/3/2018				
WIC Health - Stroom Kids		WILL PANTHIP	Online/Internet	Completed		5/3/2018				
🧷 🗙 Carbohydrate/Protein		WILAI PANTHIP	Online/Internet	Scheduled	11/26/2018					
🧷 🗙 Health Snacks		URAI PANTHIP	Online/Internet	Scheduled	5/3/2018					
▶ Selected Row Details										

Refresh Online Education Button

Washington WIC won't be using online education at the time of implementation. We'll research this feature as a future option.



Policy Topics

Link: Cascades Policies and Procedures Manual

NUTRITION EDUCATION

- You must mark at least one nutrition education topic **complete** at the initial certification and subsequent certification to meet the basic contact nutrition education requirement.
- You must mark at least one topic complete at the following appointments to meet the second nutrition education requirement:
 - Nutrition Education Individual, Group session/class, or RD appointment (for high risk participants)
 - o Mid-certification Health Assessment appointment
- Nutrition education refusal Nutrition education is a requirement of the WIC program, but participants or families may refuse. See the WIC Connects section for clarification about what a refusal is and isn't.
- Staff must have a goal setting conversation at each initial and subsequent certification.

Reference: Cascades Volume 1, Chapter 16 – Nutrition Education

WIC Connects Skill

NUTRITION EDUCATION REFUSALS

Nutrition education is a key part of the WIC program, and we offer it at the majority of WIC appointments. If nutrition education is a required part of the appointment, staff are expected to offer participant centered nutrition education. Topics should be of interest to the participant, based on your conversation or their category.

What refusal isn't:

- "I don't have time today."
- "I'm not interested in talking about that."
- "I don't think that's realistic for me right now."

What refusal might sound like:

- "I just want my benefits (after offering nutrition education topics)."
- "I'm never ever talking about nutrition. I just come here for the food."
- "I won't see the WIC dietitian."

Keep in mind that people's wants and needs change. The next time the participant comes in, she might want to talk about nutrition, even if she's said no every other time.

Note: Cascades won't allow you to select nutrition education refusal on the same day a nutrition education topic has been completed.

RESOURCES FOR GOAL SETTING

You've probably wondered about the "goals" section of Cascades. Goal setting might be new to you, or you might already be helping participants set nutrition related goals. Since this is a new skill for many of us, we've created two separate Goal Setting trainings to help you get familiar with this WIC Connects skill. They're available in the LMS:

- 1. DOH STATE WIC Participant Centered Goal Setting
- 2. Goal Setting in Cascades (coming soon to the LMS)

Issue Benefits

One of the biggest changes for participants will be using a WIC Card to buy their WIC foods at the store. There are big changes for staff also, including new ways to issue food benefits and many new terms for food packages and issuance.

Terms and Definitions

New System-specific Words or Definitions							
Food Prescription	 Term used in Cascades for food benefits issued to participants. Called food packages in Client Services. Not the same as in Client Services where prescriptions 						
	mean "needing a medical documentation form."						
	 Cascades automatically selects the appropriate default food prescription for a participant. The CPA reviews and adjusts the foods or amounts as needed 						
	 Staff use the Food Prescription screen to create or 						
	review food prescriptions, set the family issuance day, and issuance frequency.						
Cardholder	The person who receives the WIC Card.						
	• Staff can select the parent guardian, caretaker or proxy.						
	 Cascades automatically selects the foster child as the cardholder. 						
	• The cardholder's date of birth is required to set a PIN for						
	the WIC Card.						
Medical Documentation	Term used for Physician Prescribed Foods.						
Food Prescription Date	 Beginning date for a food prescription. 						
	Can be today's date or a future date.						
Family Issuance Day	• First day participants can use benefits for the month.						
	• To modify this day of the month, click on the						
	symbol to the left of the Family Issuance field.						
Issuance Frequency	 Shows the number of months a family receives food benefits. The default value is "2" 						
	 To modify the frequency click on the symbol to the 						
	left of the Issuance Frequency field.						
Unit of Measure	 Cascades displays Food Prescription items using the unit 						
(UOM)	of measure that makes sense for the food item.						
	Example: dozen, ounces, gallons, containers, dollars						
Food Category	• Type of WIC food. Example: milk, whole grains						

Food Subcategory	•	Food Categories which have options, either chosen by
		the participant or prescribed by the health care
		provider.
		Example: Milk is a food category. Its subcategories are
		low fat milk, whole milk, lactose free milk, etc.
Food Instruments (FI)	٠	"Issue Food Instruments" means issuing food benefits
		into a participant's Electronic Benefits Account (EBA).
Issuance Aggregation	٠	Cascades offers two modes to view food benefits in the
		Issue Food Instruments quick link.
	٠	The regular view separates food benefits for each
		participant of a family.
	•	The Issuance Aggregation view at the bottom of the
		Issue Food Instruments page combines food benefits for
		all participants in a family into one list.
	•	Click the triangle symbol to expand or collapse the
		aggregated view.
FDTS	•	"First Day to Spend" – the first day the family can
		purchase the foods with the WIC Card.
	•	Based on the Family Issuance Day.
LDTS	٠	"Last Day to Spend" food benefits.
Proration	٠	Cascades reduces WIC foods by a set amount each week
		when issued 7 + days after the Family Issuance Day.
	•	See <u>Tool 2</u> for more information about proration.

New Ways to Look at Common Features: Food Prescription Carousel

Adult Category

The carousel displays three subcategories for adults:

P = pregnant B = breastfeeding N = non-breastfeeding Food Prescription Date WIC Category Breastfeeding Status 8/6/2018 B S/3/2018 B/6/2018 Breastfeeding Partially Breastfeeding Status 8/6/2018 B S/3/2018 B/6/2018 B = breastfeeding Status 3 Month(s)

Infant Category

The carousel breaks down each infant food prescription by the infant's age.

 Food Prescription 										
					5/3/2018 0 Months	5/4/2018 1 to 3 Months	8/4/2018 4 to 5 Months	0/4/2018 9 to 11 Months	4/4/2019 12 to 23 Months)
Food Prescription Date 8/4/2018	WIC Category Infant	Age Category 4 to 5 Months	Breastfeeding Status Partially Breastfed <= MMA	Family 3	Issuance Day	J Ssuance Fi 3 Month(s)	requency			

Child Category

Like above, the child's food prescription date also displays the child's current age range.

		5/30/2018 2 yr to 5 yr
Food Prescription Date WIC Category 5/30/2018 Child	Age Category Family Issuance Da 2 yr to 5 yr 8	Issuance Frequency 3 Month(s)

Policy Topics

Link: Cascades Policies and Procedures Manual

ISSUING BENEFITS WITH THE WIC CARD

- Staff can change the Family Issuance Day if no member of the family has current or future benefits issued.
 - \circ This resets the first day to spend and prevents food benefit proration.
- Staff can delay the signature for receiving WIC benefits if needed.
 - Important note: The participant, parent guardian, caretaker, proxy, or WIC staff must sign for food benefits in order for them to be available in the EBA and purchased at the store.
- Staff can issue food benefits to the participant's or family's EBA when the person isn't in the clinic. Reasons for issuing benefits this way include, but aren't limited to: staff shortages, transportation issues, illness, and work schedule.

Reference: Cascades Volume 1, Chapter 22 – Issuing WIC Benefits

WIC Connects Skill

TALKING ABOUT FOOD BENEFIT PRORATION

Proration is new to Washington WIC. It's the practice of reducing the amount of food a participant receives when staff issue food or formula benefits more than 7 days after the family issuance day. This may be uncomfortable for staff, and may surprise or upset participants who've been on WIC for a while.

While this is new for Washington WIC, most other states prorate benefits. The intent is to give the "right amount" of WIC foods for the time remaining in the family's benefit cycle. Cascades only prorates benefits for one month and issues the full food package for the following months.

Choosing the words you use to describe this is very important. If a participant is upset about proration, remember to listen and affirm the person's feelings. Try to avoid using negative language when talking about proration with participants. Over time, proration will become the new "normal." In the meantime, here's an example of how to talk about proration with participants:

"Food benefits are issued a little differently with WIC Cards than with checks. The system knows the right amount of benefits for each week. The benefit amount of some food items may be reduced if you come in to pick up benefits later than usual in the month. It goes back to normal the next month. Because of this, we'll try to schedule your appointments around the same time every month. "

If someone needs additional food or formula, offer to assist with a referral.

Tools

TOOL 1: MILK SUBSTITUTION CALCULATOR

Use this nifty calculator to keep milk substitutions within the total milk amount allowed.

Example:

A participant wants to substitute yogurt for some of the milk.

- Her Total Milk Available shows as 5.50 gallons.
- She already receives one pound of cheese, which shows as 0.75 gallons **Total Milk Substituted**.

Milk Substitution Calculator										
Total Milk Available	Milk Prescribed	Total Milk Substituted	Milk Remaining	Unit of Measure						
5.50	4.75	0.75	0	Gallon						

The CPA substitutes one quart of yogurt.

- Her Total Milk Available stays at 5.50, but her **Milk Prescribed** now shows as 4.50—one quart less than before the substitution.
- Her Total Milk Substituted jumped to 1 gallon.

Milk Substitution Calculator						
Total Milk Available	Milk Prescribed	Total Milk Substituted	Milk Remaining	Unit of Measure		
5.50	4.50		0	Gallon		

∞	TIP!	
Ĭ	We are busy building a variety of staff and participant tools to guide you as you learn Cascades.	
	For example, on our Cascades web page you'll find a handout that helps participants read their benefit balance. This handout will also be translated into 11 languages and sent to clinics as part of the "Get Started with Cascades" materials.	
	It's one of the helpful tools you'll use to share shopping information when your participants get their WIC Card.	2

TOOL 2: FOOD BENEFIT PRORATION

Cascades prorates food benefits in the following situations:

- When staff issue food benefits more than 7 days after the Family Issuance Day.
- When staff certify a new member of the family more than 7 days after the established Family Issuance Day.
 - Cascades prorates the new participant's benefits for the **first month** to align the person with the rest of the family.
 - The person will receive **full food benefits for following months**.

Cascades uses ¼ proration where the food package size decreases each week.

Days After Family Issuance Day	Food Package Size
1-7	Full package
8 – 15	¾ package
16 – 23	½ package
24 – 31	¼ package

Foods decrease each week according to the following:

- Each food has a defined minimum quantity that a participant won't receive less than, even with the ¼ food package.
- Some foods don't prorate including canned fish and the Fruit and Vegetable cash value voucher.

Food	Amount prorated each week				Minimum quantity
Pregnant, Breastfeeding, Non-breastfeeding Postpartum, Children					
Milk	¼ of total	¼ of total	¼ of total	¼ of total	1 quart
Cheese	1 pound	N/A	N/A	N/A	1 pound
Eggs	1 dozen	N/A	N/A	N/A	1 dozen
Cereal	N/A	12 ounces	12 ounces	N/A	12 ounces
Juice	N/A	1 container	N/A	1 container	1 container
Canned beans	1 can	1 can	1 can	1 can	1 can
Dry beans, peas or lentils	N/A	N/A	N/A	N/A	1 pound
Peanut butter	N/A	N/A	N/A	N/A	1 container
Bread/Whole grains	N/A	16 ounces	N/A	N/A	16 ounces
		(children)			
Infants					
Infant formula	¼ of total	¼ of total	¼ of total	¼ of total	1 can
Infant cereal	N/A	8 ounces	8 ounces	N/A	8 ounces
Infant fruits and	8 ounces	8 ounces	8 ounces	8 ounces	4 ounces
vegetables					
Infant meats	7 ounces	7 ounces	7 ounces	7 ounces	2.5 ounces

Pregnant Participant - Proration Example					
WIC Food	Full food package	¾ food package	½ food package	¼ food package	
Cereal	36 ounces	27 ounces	18 ounces	12 ounces	
Juice	3 containers	2 containers	2 containers	1 container	
Milk	4.75 gallons	3.75 gallons	2.50 gallons	1.25 gallons	
Peanut butter	1 container	1 container	1 container	1 container	
Legumes	1 container	1 container	1 container	1 container	
Bread/Whole Grains	16 ounces	16 ounces	16 ounces	16 ounces	
Eggs	1 dozen	1 dozen	1 dozen	1 dozen	
Cheese	1 pound	1 pound	1 pound	1 pound	
Fruits and Vegetables	\$11.00	\$11.00	\$11.00	\$11.00	

Proration Example for a Pregnant Participant:

Proration Example for a Fully Formula Fed 6-month old Infant:

Fully Formula Fed Infant 6 months of age - Proration Example					
WIC Food	Full food package	¾ food package	½ food package	¼ food package	
Infant formula Similac Advance powder	7 cans	5 cans	4 cans	2 cans	
Infant cereal	24 ounces	18 ounces	12 ounces	8 ounces	
Infant fruits and vegetables	128 ounces	96 ounces	64 ounces	32 ounces	

TOOL 3: SHOPPING LIST

Use the shopping list as a tool for WIC food and shopping education. Here's an example of Ginny and Julio's Shopping List printed from Cascades.

