



Training Supplement

Unit 1

GETTING STARTED

Contents

About this Supplement 3

About this Unit 3

Terms and Definitions 7

New Ways to Look at Common Features 9

 Error Summary Button..... 9

 Tab Mode Button..... 9

 Zoom Slider 10

 Push Pin 11

 F12 Button 11

Policy Topics 12

 Homeless/Incarcerated Status 12

 Scanning Documents 12

WIC Connects for Cascades 13

Tools..... 14

 Tool 1: Roles in Cascades..... 14

 Tool 2: Icon Cheatsheet..... 15



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.
- 3) 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).



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

To help you transition from the Client Information Management System (CIMS) to Cascades we've created this Training Supplement. For each of the Computer Training modules a Training Supplement is included to help you:

- Connect your current work in CIMS to the work you'll do in Cascades.
- Identify new language and terms and have a place to circle, highlight, and make notes to bring back to your clinic while learning about Cascades.
- Have an easy reference to help you organize new topics, computer functions, and ways of completing WIC work in Cascades.
- Learn about some of the new policies and procedures.
- 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.

About this Unit

In Unit One, you'll learn the basics about Cascades, including how to log in, some common features, navigation links, and common functions.

We'll point out some of the information you'll need that's specific to Washington State.

- Some things will stay the same. You'll still need to login to Cascades. What will change is how you do this. The new system will require additional security for logging in. We'll share more about how this is changing.
- Cascades is a web based application. You'll see some differences in how you login to the program. There won't be "replication" any longer, so you'll see data in real time—like transfer information!
- In CIMS you use the part of the system called Client Services. In Cascades you'll use the Family Services and Scheduling part of the system.
- Access to different sections of Cascades depends on your user role. You'll have access to all the sections you need for you to do your job.

Note: In this unit we've created reference tools for you to use and refer to as you complete all the other modules. In future units, you'll have more information about how Cascades will work for Washington WIC as we transition from CIMS Client Services.

Let's get started with a quick look at the screens you'll use often in Cascades!

Home Screen

The screenshot shows the Cascades Home Screen interface. At the top is a blue navigation bar (Title Bar) with the text 'Home' and 'GENERIC USER' on the right, and a 'Logout' button. Below this is a horizontal menu bar (Menu Bar) with categories: Home, Family Services, Scheduling, Vendor, Operations, Finance, Administration, and Help. The main content area is filled with several blue-bordered containers. A blue circle highlights the 'Operations Management' container, which lists items like 'State Family Workflow Dashboard', 'Maintain Customer Service Issue', 'Search Product Inventory', 'Maintain Local Agencies', and 'Maintain Clinics'. A blue arrow points from the text 'These boxes are called containers. They show the same sub-menu contents as the Menu Bar.' to this circle. Another blue circle highlights a zoom slider in the bottom right corner of the screen, with a blue arrow pointing from the text 'The zoom slider allows you to magnify or decrease the size of the screen.' to it. At the bottom of the screen is a status bar (Status Bar) containing the text 'Online | Version 1.6.3.1 | 80000', '017A - WIC CLINIC', and a 'TAB' button. On the right side of the status bar, there is a zoom slider set to 100%.

Not everyone will see this many containers. CPA's and other clinic staff will have home pages that only show containers pertaining to their work duties. [Containers](#) is a new way to describe how information is organized.

Family Screen

Family information displays on the left of the carousel.

This is called the display mode.

The family carousel shows all participants in a family.

Participant information display information for individual participants. You can easily see ID, age and category information here.

The quick links navigation bar allows you to quickly get to different screens.

Click on the bolded words to expand the submenus.

The screenshot displays the 'Family Demographics' software interface. At the top, there is a navigation menu with options: Home, Family Services, Scheduling, Vendor, Operations, Finance, Administration, and Help. A 'Quick Links' section is visible on the left side of the main content area. The main content area is titled 'DOE Family' and includes a 'Family ID: F1560000093' and address '88 MAIN STREET, OVERLAND PARK, KS 66210'. Below this, there is a 'Family Carousel' showing two participants: JANE and JONATHAN. The 'Participant Information' section for JANE DOE is expanded, showing fields for Last Name (DOE), First Name (JANE), M.I., Suffix, Nickname, Maiden Name, Proof of Identification (DRIVER'S LICENSE/PHOTO ID), SSN, Date of Birth (5/4/1992), Marital Status, Education Level, Address (88 MAIN STREET), ZIP Code (66210), City (OVERLAND PARK), State (KS), County (JOHNSON), Proof of Residence, Homeless / Incarcerated Status, Migrant Status, Voter Registration, Language Read (English), Language Spoken (English), Email Address, and Preferred Method of Contact (Phone). A 'Participant List' table is visible at the bottom, showing one participant with a red 'X' in the 'Do not call' column. The interface also includes a 'Care Plan' section with various sub-items like 'Family Demographics', 'Family Assessment', etc. The bottom status bar shows 'Online | Version 1.6.2.0 | 10002', '017A - WIC CLINIC', and 'TAB'.

The Family Carousel in More Detail

Overview

Highlighted Grey means this participant is selected.



Detailed Participant Information
 Participant Name: JANET M. ANDERSON
 Participant ID: KS0090000035
 Family ID: F00900000017
 Category: Pregnant
 Status: Active/Certified
 Certification Period: 4/4/2012 - 7/31/2012
 High Risk: Yes
 Date of Birth: 5/25/1989
 Clinic Name: Clinic Name 42

Hover over the grey area to see detailed information about the participant.

What Do These Symbols Mean?*



Adult	Female Child (1-5 years)	Male Child (1-5 years)	Female Infant (<1 years)	Male Infant (<1 years)

*We know the current family member icons don't fully represent the spectrum of gender identification. In time, we hope to offer icons that are more representative of our participants.





	Active Certification		Disqualified
	Expired Certification		Ineligible
	Terminated Certification		Deceased
	Foster Child		High Risk
	Waiting List		"Dirty" or Unsaved Data
	Food benefits available		Food benefits not available
	Food benefits issued for month		Food benefits not available

Terms and Definitions

New Family-specific Definitions	
Parent Guardian 1 and 2	This was the Caregiver in Client Services. <ul style="list-style-type: none"> The parent guardian has custodial rights. Mark the participant check box if the parent guardian 1 is also a participant.
Caretaker	This was the Alternate in Client Services. <ul style="list-style-type: none"> A parent guardian can designate a caretaker. A caretaker can bring infants and children to certification appointments, receive and share nutrition education, and redeem WIC benefits for the family.
Proxy	This is a new term. <ul style="list-style-type: none"> A proxy can only redeem food benefits for the family.
Participant	This was the Client in Client Services. <ul style="list-style-type: none"> Each member of the family you certify is a participant.
Foster Family	Select the foster family check box only if all the participants in the family are foster children.
Foster Child	Check the foster child check box in the “Add participant” section to add a foster child to the family.
Homeless/Incarcerated Status	<ul style="list-style-type: none"> Homeless: Living in a temporary situation for no more than 365 days. Incarcerated: The participant or parent guardian is in jail.

Cascades category names and abbreviations are slightly different than Client Services.

Categories and Abbreviations Client Services		Categories and Abbreviations Cascades	
Pregnant	PG	Pregnant	P
Breastfeeding	BF	Breastfeeding	B
Post-Partum	PP	Non-breastfeeding Postpartum	N
Infant	I	Infant	I
Child	C	Child	C

New System-specific Words or Definitions	
Container	<ul style="list-style-type: none"> On the home page, menu items are in pre-set boxes called containers. Containers have a title—the menu item—and sub-menu items underneath.
Sub-menu	<ul style="list-style-type: none"> Cascades uses this term for any menu selection under a container title. For example, on the Home page under the title Family Services, you'll see the sub-menu items Add a New Family, Family Search, and others.
Command links	<ul style="list-style-type: none"> This means a clickable link. For example, if you click on the sub-menu item Family Search in the Family Services container, you've used a command link.
Quick Links	<ul style="list-style-type: none"> The left side of the family page contains the Quick Links navigation bar with bolded menu items. When you click on the expander button, sub-menu items appear. For example, the menu item Care Plan has sub-menu items like Care Plan Summary, Care Plan Detail, Referral Program, Nutrition Education, and others.
Expander button	<ul style="list-style-type: none"> When the expander button is hiding sub-menu items, the button has this plus shape . Once, the sub-menu items are showing, the button changes to a minus shape . Click it to collapse the sub-menu items to their hidden state again.
Dirty Data	<ul style="list-style-type: none"> Cascades uses the terms dirty or unsaved data interchangeably. The symbol is .
Family Carousel	<ul style="list-style-type: none"> Cascades groups all members of a family together. You'll be able to see all family members at a glance, including family information and individual member information. Distinct icons give information on each member's WIC category, gender, WIC status, and more.
Multiselect Slider	<ul style="list-style-type: none"> This feature allows you to easily add multiple items from a list to a participant's profile.
Content Flipper or "Flippy"	<ul style="list-style-type: none"> Cascades groups screens for related information together, like individual folders in a bigger file folder. You can click the double arrow button  in the top right corner to display all the screens.
Data Grids	<ul style="list-style-type: none"> You can sort and arrange grids in a personalized way. For example, you can arrange participant search results so last names appear first instead of participant ID numbers.

New Ways to Look at Common Features

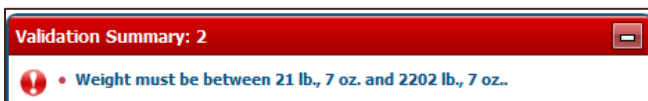
The status bar at the bottom of your screen

ERROR SUMMARY BUTTON

Cascades helps prevent incorrect data. For example, if you enter the weight of an adult participant as “5 pounds”, you’ll get a red error message at the bottom right of your status bar.



The Error Summary Button pop-up screen titled “Validation Summary” displays suggestions for correct data entry.



TAB MODE BUTTON

In Client Services, using the Tab key on the keyboard only moves through fields on the screen from left to right. In Cascades, another way Cascades helps you is with the Tab Mode button. You can choose how the Tab key moves through fields.

The options are:

- **TAB:** This is the default mode. If you use the tab key, it will take you through all active fields on the screen.



- **REQ:** This stands for Required Information tab mode. In this mode, pressing the tab key will move through only the required—or starred—fields.



- **ERR:** In this tab mode, you’ll tab only into fields that have an error. Use this tab mode to quickly fix mistakes that the Error Summary Button identified.

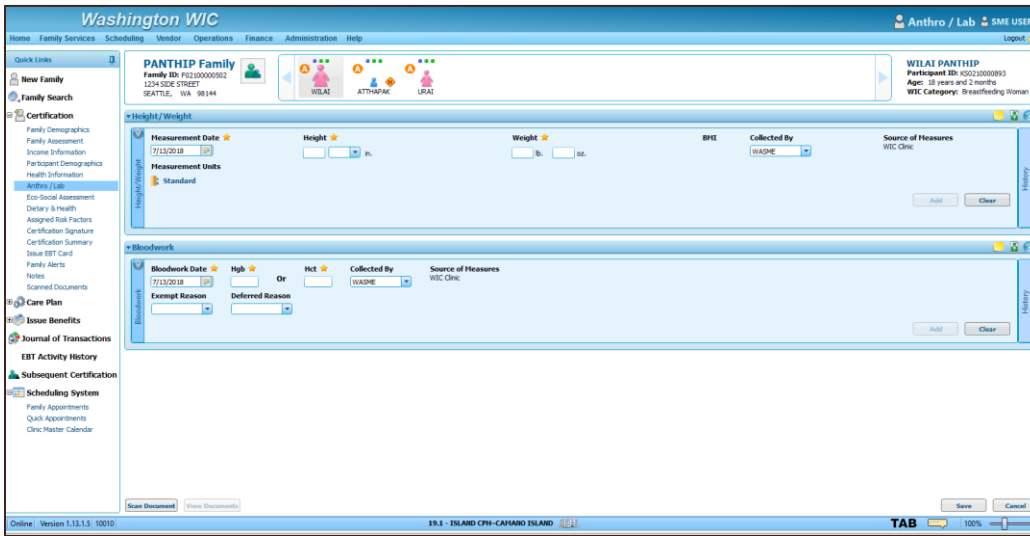


ZOOM SLIDER

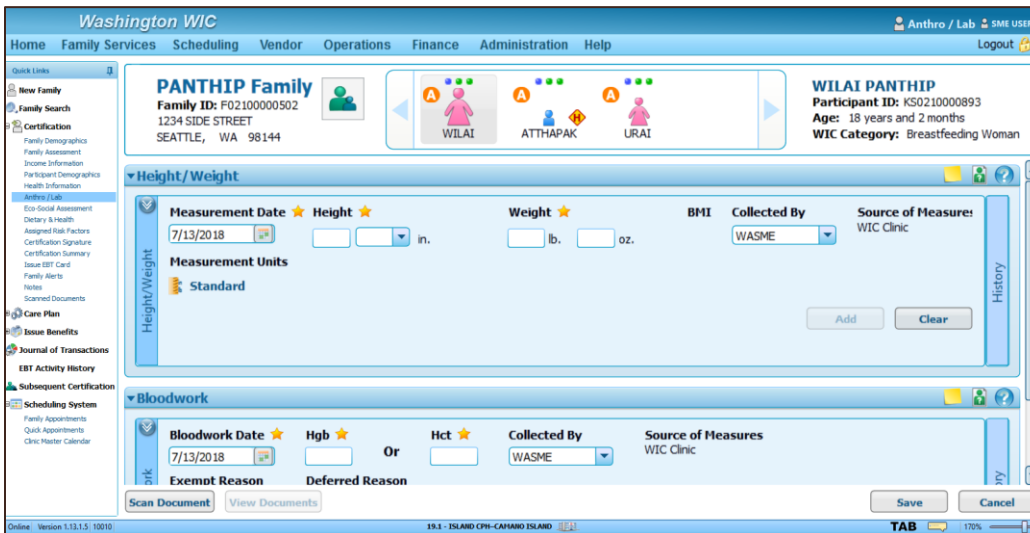
Have you ever found yourself wishing you could make the information on your computer screen larger (or smaller)? If so, you'll appreciate the Zoom Slider. Slide the zoom bar to increase or decrease the size of the page.



View of Screen at 100%





View of screen at 170%



Creating more space for you to work on your Cascades screen

PUSH PIN

There's a Push Pin symbol  in the right top corner of the Quick Links navigation bar. In this position, the Quick Links bar is "fixed", meaning it will stay displayed on the left hand side of the family page.

If you click on the Push Pin, it changes to a right facing position .

The Quick Links bar slides out of the frame and you'll see a vertical tab labeled **Quick Links** instead.

Now you have extra space on your screen!

To access your Quick links bar, click the vertical tab.



Washington WIC

Home Family Services Scheduling Vendor Operations Finance Administration Help

Quick Links

New Family

Family Search

Certification

- Family Demographics
- Family Assessment
- Income Information
- Participant Demographics
- Health Information
- Anthro / Lab
- Eco-Social Assessment
- Dietary & Health
- Assigned Risk Factors
- Certification Signature
- Certification Summary
- Issue EBT Card
- Family Alerts
- Notes
- Scanned Documents

Care Plan

Issue Benefits

Journal of Transactions

EBT Activity History

Subsequent Certification

Scheduling System

MARTINEZ Family

Family ID: F02100000466
4567 2ND STREET
SEATTLE, WA 98102

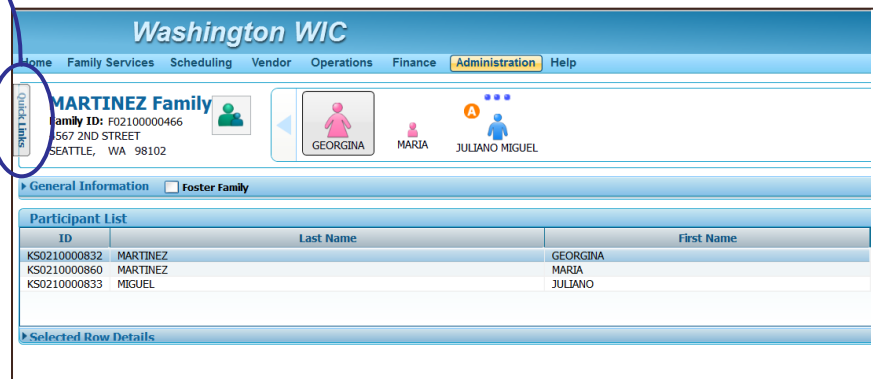
GEORGINA MARIA JULIANO MIGUEL

General Information Foster Family

Participant List

ID	Last Name	First Name
KS0210000832	MARTINEZ	GEORGINA
KS0210000860	MARTINEZ	MARIA
KS0210000833	MIGUEL	JULIANO

Selected Row Details



Washington WIC

Home Family Services Scheduling Vendor Operations Finance Administration Help

Quick Links

MARTINEZ Family

Family ID: F02100000466
567 2ND STREET
SEATTLE, WA 98102

GEORGINA MARIA JULIANO MIGUEL

General Information Foster Family

Participant List

ID	Last Name	First Name
KS0210000832	MARTINEZ	GEORGINA
KS0210000860	MARTINEZ	MARIA
KS0210000833	MIGUEL	JULIANO

Selected Row Details

F12 BUTTON

Cascades also offers this nifty trick to create more space for you to work in the family page: If you press the **F12** button, you can make the Title, Menu, and Status bars disappear. Press **F12** again to make them reappear.

Policy Topics

We created a new webpage for you with Cascades-specific policy chapters to use as a reference while you review the CBT's and learn about the new system.

- Continue using Client Services policies in your clinic until Cascades launches in your clinic.
- Once your clinic implements Cascades you'll use the Cascades policies exclusively.

Link: [Cascades Policies and Procedures Manual](#)

HOMELESS/INCARCERATED STATUS

Cascades has a dropdown list to document homeless or incarcerated status:

1. Select the type of shelter or living situation for homeless families.
2. Select **Incarcerated** when the participant or parent guardian is in jail. For example, a participant in the Washington Corrections Center for Women in Purdy.

References: Cascades Volume 1, Chapter 18 – Certification

Cascades Volume 1, Chapter 19 – Special Participants

SCANNING DOCUMENTS

Scanning is a new feature in Cascades.

- Check the appropriate policy chapter to see if you must scan a document. For example see Cascades Volume 1, Chapter 6 – Income for information about scanning the WIC Grace Period for Income Form.
- Clinic staff are encouraged to only scan documents required by policy.

WIC Connects for Cascades

You may need some additional time to navigate around the new screens after your clinic gets Cascades. Your WIC Connects skills are an important part of assuring participants you're listening and supporting them (even while trying to remember where to document their information). Participants tell us it's helpful to *set the stage* so they'll know what to expect and about how long the appointment will take. Here are some examples:

- Thanks for coming in today. I think you've heard we've changed to a new system—and it includes getting a WIC Card for shopping instead of paper checks. Your appointment might take a little longer while we all learn the new system.
- Thanks for being patient with me today while I learn this new way of adding information into our new system. I may look at the screens a little more so I just want you to know I'm listening too.

You'll find what works best for you and your participants. It may help you to know a few helpful things we've heard about changing to a new computer system.

- You won't really need to share the *details* about a new computer system. It's similar to when your bank changes software or you're notified of an upgrade, you don't really need to know the name or details, just those parts that affect you and how you use their services.
- To save time and to focus on participants, you won't need to let them know we've changed from Client Services to Cascades or that we're now using the internet for WIC services.

Clearly, participants will see some new changes and also ones they've been waiting for like WIC Cards. How you share information can help you offer information in a participant centered way.

How do you see using this information with your participants?

Tools

















TOOL 1: ROLES IN CASCADES

Each clinic role has certain screen permissions and limitations.

Roles in Cascades			
Clinic Role	Definition	Screen Permissions	Screen Limitations
Clerk, Certifier, RD	Includes: <ul style="list-style-type: none"> • Clerks, • Certifiers, Clerk/Certifiers • Registered Dietitians 	<ul style="list-style-type: none"> • Search for families • Certify • Document information • Schedule appointments 	Can't edit schedules or manage caseload
Clinic Administrator	Includes: Clinic Coordinator	In addition to permissions above: <ul style="list-style-type: none"> • Set up schedule • Manage caseload 	No access to state level functions
Breastfeeding Peer Counselor	This role is for BFPC's only who provide no other WIC services	Only screens relating to breastfeeding peer counseling	Read-only access to certification and income eligibility screens
Scheduler	Non-WIC staff who prescreen and schedule Participants	<ul style="list-style-type: none"> • Search for families • Add new families • Schedule appointments 	
Clinic View Only	Financial auditors and State WIC monitor staff	View only permissions	Can't add or change any data

Talk to your clinic coordinator to learn more about roles for your clinic.

TOOL 2: ICON CHEATSHEET

General Icons		
Icon	Symbol	Definition
Processing		Displays when you are transitioning from one screen to another, or if you are saving or printing.
“Dirty” or Unsaved Data		Displays when added or modified data hasn’t been saved.
Gold Star		Indicates required information, or a required step to complete a certification.
Optional Step		This step is optional and not required to complete a certification.
Completed Step		This step is completed.
Missing or disqualifying information		The step is required and information necessary to complete the step is missing. This icon can also mean the information provided identifies the applicant as ineligible.
Add		This button changes to “Edit” once the information is added.
Edit		Allows you to edit information within a field.
Post-it Note		Allows you to add a free-form note to a screen.
Post-it Note with Content		Indicates a free-form note with content. Click to read the note.
Magnifying glass		Click to see additional information.
Calendar		Click to see the current month.
Family Search		Click to search for a family.
Active Only		All participants of this family are active.
Inactive Displayed		Not all participants of this family are active, but all are displayed.
Inactive Not Displayed		Not all participants of this family are active. Inactive participants aren’t displayed.