

Slide 1



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

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Additional talking points:

- This presentation will provide training around why it is important to complete a thorough applicant/participant search in Cascades prior to creating a new person.

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.



Additional talking points:

- Why should we conduct a statewide family search? In addition to the bullets on the slide it is important to make sure we do a thorough participant search to avoid creation of a duplicate record.
- The reason this is especially important is because when a duplicate record is created it could mean a participant is issued duplicate benefits.
- When duplicate benefits are spent it could result in a claim for all duplicate benefits spent and a 1-year disqualification.

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.*



Additional talking points:

- To help you with avoiding creating a duplicate record we have shared on this slide some questions to ask the applicant prior to creating their record.

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.



Additional talking points:

- In addition to asking the applicant/participant clarifying questions, it is important to notice that sometimes a full name may be misspelled, or a date of birth may have been entered incorrectly.
- The bullets on this slide provide clarity around how to search.

Search for New Participants

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.

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Additional talking points:

- The system will default to search within your clinic for Active only participants. Please update the search settings to **State-Wide** and uncheck **Active**.
- Once search settings are updated – conduct a search as exact as possible using participant full last name, first name, and date of birth (if you feel this will narrow the search).
- If there is a match in the system, the participant will be displayed in the **Search Results** field.
- Keep in mind that adding more search criteria may cause you to miss a person if their information was incorrectly entered.

Participant Search Results – Status Column

Search Results										Total Items: 7424
Full	Na	First Ni	M.I.	Date of Bi	Cater	Medic	Status	Certification End Date	Agency	
F00300000782	WA0030001351	JON	BRO	9/4/2017	C		Certification Expired	9/30/2021	L02 - Asotin County Health District	L02C
F00300000782	WA0030001352	JON	CHA	12/10/2017	C		Active/Certified	12/31/2021	L02 - Asotin County Health District	L02C
F00300000807	WA0030001542	JON	RAI	B 4/8/2021	I		Active/Certified	4/30/2022	L02 - Asotin County Health District	L02C
F00600004952		JIM	ANG	2/11/1987					L03 - Benton Franklin Health District	L03C
F00600004952	WA0060008693	JIM	ANG	2/11/1987	P		Certification Expired	10/31/2020	L03 - Benton Franklin Health District	L03C

- 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.



Additional talking points:

- We'd like to take a moment and review the **Search Results** page. The **Status Column** allows you to easily see the participants status.
- When an inactive record exists, there are 2 actions you must take. First, create a new participant record in your clinic and, then request Cascades Support to link the new record to the Expired record from the other clinic.
- If the participant exists within your clinic, then you can use their existing Active record, or if only an inactive record exists, complete a Subsequent Certification using the inactive record.
- If the participant is in another clinic and they are Active you transfer them to your clinic to keep their history. If a family exists in another clinic, you must transfer the whole family regardless of benefit status, when possible.

To Conduct a Broader Search

The screenshot shows a search interface with two main sections: 'Search Criteria' and 'Search Results'. The 'Search Criteria' section includes a 'Search Location' dropdown set to 'Washington State WIC', a 'Search Type' section with 'Family' selected, and several search fields: 'Family ID' (containing '320'), 'Last Name' (containing 'All'), 'First Name' (containing 'All'), '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', and buttons for 'Search' and 'Clear Criteria'. The 'Search Results' section shows a table with columns: 'Family ID', 'Participant ID', 'Last Name', 'First Name', 'M.I.', 'Date of Birth', 'Cat', and 'Certification'. The table contains 8 rows of data. A red box highlights the 'Last Name', 'First Name', and 'Date of Birth' columns in the first row.

Family ID	Participant ID	Last Name	First Name	M.I.	Date of Birth	Cat	Certification
F13400002612	WA1340004758	JOH	ALL		6/28/1983		
F13400002612	WA1340004758	JOH	ALL		6/28/1983		P
F15700002768	WA1570004784	JOH	ALL	R	4/7/1993		N
F15700002768	WA1570004784	JOH	ALL	R	4/7/1993		N
LF10113948		Joh	All		8/10/1991		P
LF10113948	LWA10119423	Joh	All		8/10/1991		P
LF1185269		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.



Additional talking points:

- In addition to doing a narrow search you may need to conduct a broader search to do your part to locate an existing record the participant could have.

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

The screenshot shows a search interface with two main sections. The top section is 'Search Criteria' with fields for Search Location (State/Local Agency/Chic), Search Type (Family/Participant/Transfer/Infant), and various identification fields (Family ID, Last Name, First Name, M.I., Telephone Number, Date of Birth, Participant ID, Medicaid Number, EBT Card Number). There are checkboxes for 'Online Applicant Only' and 'Active Only', and a 'Search' button. The bottom section is 'Search Results' showing a table with 6 items. A red arrow points from the 'Search' button to the table.

Family ID	Participant ID	Last Name	First Name	M.I.	Date of Birth	Chic	Medic	Status	Certification End Date	Agency
F1800000921		JOHNSON	MIKA		8/10/1990					L35 - Public Health South
F1800003668		JOHNSON	SUSAN		9/30/2001					L45 - Snohomish Health C
F1800003668	WA1890006352	JOHNSON	SUSAN		9/30/2001	B		Active/Certified	6/30/2022	L45 - Snohomish Health C
F1800003668	WA1890006354	JOHNSON	TEDDY		6/5/2021	I		Active/Certified	6/30/2022	L45 - Snohomish Health C
F1000000921	WA1010001963	JOHNSON	MIKA		8/10/1990		P	Active/Certified	5/31/2022	L35 - Public Health South
F2400001839		JOH	APR	W	2/27/2003					L35 - Public Health South



Additional talking points:

- If an applicant/participant already exists in Cascades, they will display in the **Search Results**.
- View the **Status Column** to see if the record is Active/Certified.
- If you find that a new applicant/participant has an existing record, please refer to the Foster Care & Transfers section of the Cascades Support page here - <https://www.doh.wa.gov/ForPublicHealthandHealthcareProviders/PublicHealthSystemResourcesandServices/LocalHealthResourcesandTools/WIC/CascadesSupport>

Helpful Icons in Cascades

Icon	Explanation
	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.
	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. In this example the ghost participant has an Expired status (notice the icon with the red circle and a white E). Use this participant's Expired file to complete a Subsequent Certification rather than start a new file for this person.

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Additional talking points:

- Read slides icon/explanation.
- It is important that staff verify when an Expired person exists that the expired person is still part of this family.
- Some children with Expired records have ended up with duplicate records because:
 - one record exists with each parent who are in separate homes, or
 - one record exists with a foster parent and one with the birth parent, or
 - one expired record exists with a parent who no longer has legal custody, and another active record exists with the parent who does have legal custody.

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>

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Additional talking points:

- Read slides icon/explanation.
- It is important to know that if you experience something outside of the guidance provided on this, and any of the slides, that you reach out to Cascades Support. This can be confusing and could have several scenarios and variations of households.

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.



Additional talking points:

- When you create a new participant, and the new participant you are adding is active in the system, it will create a pop-up stating there is a “Possible Duplicate Participant”.
- At this point you should ask the participant questions to clarify/confirm if it’s a duplicate record.
- When you select the participant's name you will have the option to select **Open Selected Family** button or bypass and **Create New Client**. To back out of this screen select the **Cancel** button.
- If the DOB is incorrect – in general, we cannot update and are required to create a new participant. *If the DOB is on a caregiver – who is also a participant, you should contact Cascades Support for assistance.*

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*

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Additional talking points:

Participant is in your clinic:

- When an active participant exists use the active record.
NOTE: You will need to transfer the participant by using the "Between Families" transfer option if the Parent/Guardian has changed.
- If only an **inactive** (expired and ineligible) record exists, complete a subsequent certification using the inactive record if there is no change to the Parent/Guardian.
NOTE: If there is a change to the Parent/Guardian enter a note regarding change of custody in participants Care Plan Summary, complete an Initial Certification under the new Parent/Guardian, and send link email request to Cascades Support.

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.
Note: Transfer the whole family by using the "Between Agency or Clinic" transfer option, if you are transferring the whole account.
- When an **expired participant exists**, and you cannot transfer a family:
 - Create a new participant record in your clinic and,
 - Request Cascades Support to link the new record to the expired record from the other clinic.

There are a couple scenarios to keep in mind when you cannot transfer a family:

- A foster child in Expired or Ineligible status.
- When a non-custodial parent gets custody of the child(ren) and the old custodial parent has been a participant in the other household record and all records are in Expired status.

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.



Additional talking points:

We have talked a lot about completing a thorough statewide search. Why might someone miss a file? We have listed on this slide a few reasons why files get missed.

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.



Additional talking points:

- Your work matters you can impact the continuity of care we provide to participants by ensuring their record is transferred.
- We have shared a few reasons why staff may miss an existing record.
- We want to avoid creating a duplicate record, this then prevents duplicate benefit issuance and potentially over issuance of benefits.
- When an existing record is found you should be sure to transfer when possible.
- Clear communication is important – remember to use the language line when needed.
- If you need support, please do not hesitate to reach out to the Cascades Support line.



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