



Training Supplement

Unit 2

ADD A NEW FAMILY AND SCHEDULE APPOINTMENTS

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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.
 - 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).
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About this Unit

In Unit Two, you'll learn how to:

- Search for and access family records
- Add a new family, find Master Calendar slots available for booking
- Schedule appointments
- Reschedule an appointment in multiple ways

This unit introduces a new way to schedule participants. In Client Services you schedule participants under a specific staff person (like Sara or Joe) or role (like Certifier or RD). This type of scheduling is called **resource based** scheduling.

In Cascades, you'll schedule according to the type of appointment the person needs (like Initial Certification or Nutrition Education). The calendar keeps track of the number of each type of appointment available. This type of scheduling is called **numbers based** scheduling.

You may have a lot of questions about this right now. Don't worry, there will be several places where you'll learn more about scheduling. It's a big change for all of us and we're here to support you as you learn.

Terms and Definitions

New System-Specific Words or Definitions	
EBA	<ul style="list-style-type: none"> • Stands for Electronic Benefit Account. • Cascades assigns each family and foster child an EBA. • The EBA stores the family's combined food benefits or the individual foster child's food benefits. • The WIC Card relies on information from the EBA. The relationship between EBA and the WIC Card is like the relationship between a bank account and a debit card.
WIC Card 	<ul style="list-style-type: none"> • Replaces WIC checks. • Participants use the WIC Card in a grocery store to purchase WIC foods. • Called an EBT card in Cascades.
Category	<ul style="list-style-type: none"> • Cascades assigns an infant's or child's category based on age and automatically updates an infant to a child after the first birthday. • For adults, staff select if the participant is pregnant, breastfeeding, or non-breastfeeding postpartum.
Communication Queue	<ul style="list-style-type: none"> • In the Appointment section of Cascades, if you place a check-mark in the "Communication Queue" checkbox, Cascades automatically sends out a notice to participants about upcoming appointments using the participant's preferred contact methods, like texting, email, or mail. • These are computer-generated messages, and don't allow two-way communication. • Washington WIC won't have auto-dialer or interactive texting software. Local agencies may purchase these systems on their own.
Staff Event	<ul style="list-style-type: none"> • Staff Events include staff meetings, trainings, etc. • Participant appointments aren't available for scheduling during Staff Events.
Open Access	<ul style="list-style-type: none"> • Staff can save a certain number, or percentage, of any appointment type on the Master Calendar. • Cascades opens the appointments for scheduling a few days prior to the appointment day.

New Ways to Look at Common Features

SEARCH FEATURES

- You can search for participants statewide, by local agency, or by clinic. Use the radio buttons to make your choice. The button defaults to **Clinic**.
- You can also search for participants by name, nickname, telephone number, participant ID, date of birth, Medicaid (ProviderOne) number, or EBT card number.
- Depending on the Search Type check box selected, a different variety of search boxes appears. The button defaults to **Family**.



TIP!

To get search results most like Client Services,
Select **Participant** and **Family** for your search types.

The search results window shows the fields you see in Client Services.

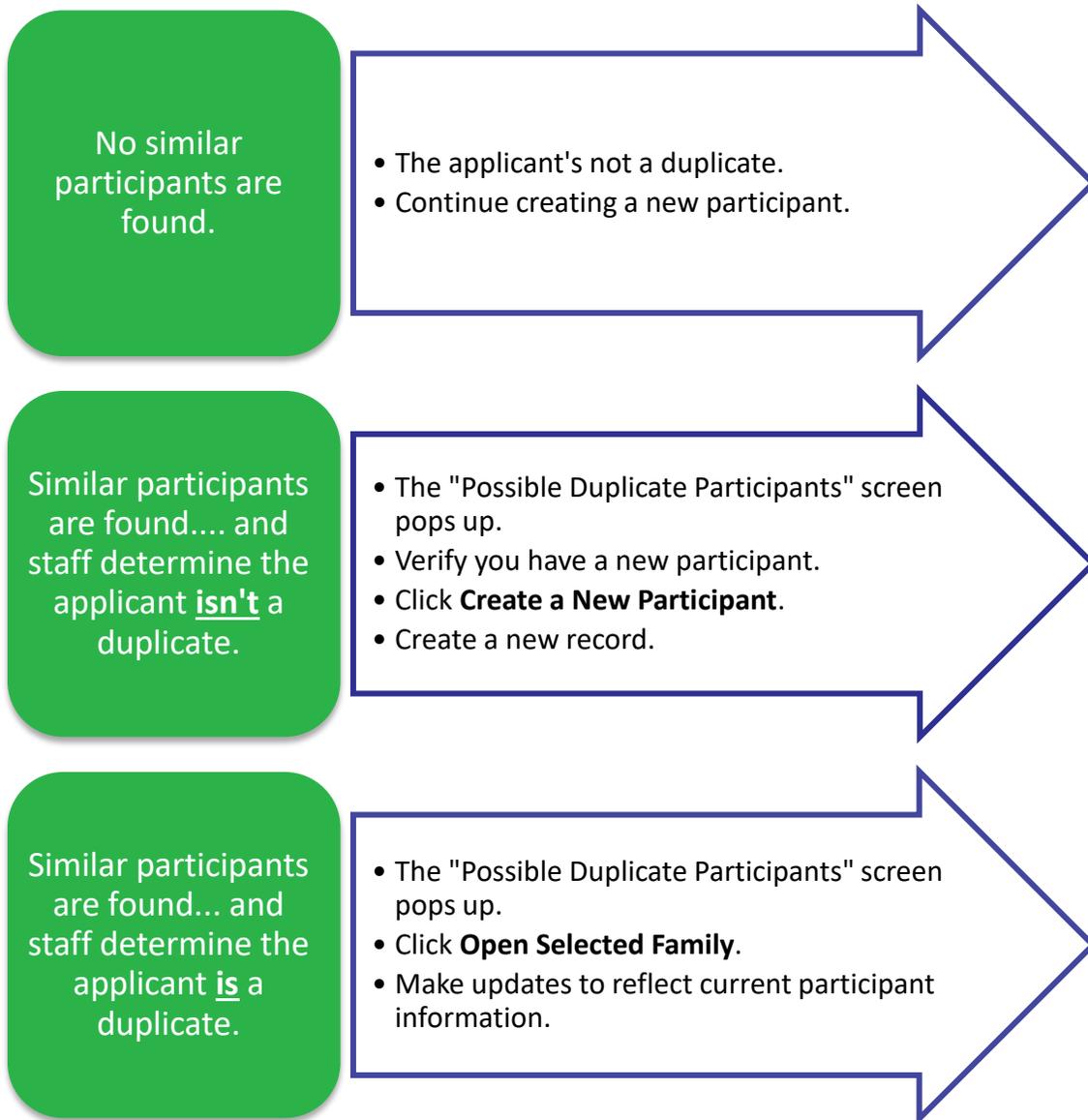


POSSIBLE DUPLICATE PARTICIPANTS

When you add new applicants or participants, Cascades performs a duplicate search using a combination of:

- First letters of
 - First Name and Last Name or
 - First Name and Maiden Name
- Year and Month of Birth Date
- Gender

Once the search is complete, the three most common scenarios are:



PROCESSING STANDARDS AND PENDING LIST

You’re already familiar with the processing standards for pregnant participants and migrants. In Cascades, breastfeeding participants and infants also fall under the 10-day processing standards.

Processing Standards	
Client Services	Cascades
<p>Within 10 days:</p> <ul style="list-style-type: none"> • Pregnant • Migrant <p>Within 20 days:</p> <ul style="list-style-type: none"> • Breastfeeding • Postpartum • Infants • Child 	<p>Within 10 days:</p> <ul style="list-style-type: none"> • Pregnant • Migrant • Breastfeeding • Infant <p>Within 20 days:</p> <ul style="list-style-type: none"> • Non-Breastfeeding Postpartum • Child 

Cascades helps staff meet the processing standards with the Pending List.

Here’s what the Pending List isn’t:

- It’s NOT a waiting list.
- It’s NOT a pending client like in Client Services.

So, what is the Pending List?

- It’s a tracking list for applicants with appointments outside the processing standards.
- It helps you contact applicants when earlier appointments become available.

Add to Pending List ... when the applicant <u>could come in</u> for an earlier appointment time.	Don’t Add to Pending List ... when the applicant <u>can’t come in</u> for an earlier appointment time.
<p>➔ Add the applicant to the Pending List.</p> <ul style="list-style-type: none"> ○ Select a system-defined reason from the drop-down menu. <p>➔ Cascades keeps track of applicants to contact, when an earlier appointment becomes available.</p> <p>➔ Contact the applicant to see if the person wants to re-schedule to an earlier appointment.</p>	<p>➔ Don’t add the applicant to the Pending List.</p> <p>➔ Schedule the applicant for a later appointment outside the processing standards.</p>

Policy Topics

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

SEARCH STATEWIDE FOR DUAL PARTICIPATION

- Staff must complete a statewide search before adding an applicant or participant to make sure they aren't already a participant in Washington State.

Reference: Cascades Volume 1, Chapter 3 – Application and Processing Standards

DOCUMENT DATE OF BIRTH (DOB) FOR PARENT GUARDIANS, CARETAKERS, AND PROXIES

- Staff must document the DOB for all Parent Guardians, Caretakers, and Proxies.
 - Staff can issue a WIC Card to Parent Guardians, Caretakers or Proxies.
 - The card holder's date of birth must be documented in Cascades in order for the person to activate the WIC Card and set a PIN.
- Staff aren't required to document ID for Parent Guardians (unless the person is a participant), Caretakers, and Proxies.

Reference: Cascades Volume 1, Chapter 18 – Certification

MARITAL STATUS AND EDUCATION LEVEL

- Staff must not ask about or document marital status and education level.
 - WIC doesn't need this information to certify participants and asking for it could give the impression of discriminatory practices.

Reference: Cascades Volume 1, Chapter 18 – Certification

PROCESSING STANDARDS AND PENDING LIST

- 10 day processing standards for: Pregnant, Breastfeeding, Infants, and Migrants
- 20 day processing standards for: Children, Non-Breastfeeding Postpartum
- Staff use a Pending List to track applicants scheduled past the processing standards and offer an earlier appointment if one becomes available.

Reference: Cascades Volume 1, Chapter 3 – Application and Processing Standards

WIC Connects for Cascades

We interact with our participants a lot, especially around scheduling! Cascades asks us to think about schedules and appointments in new ways. We know scheduling may take a little longer for us as we learn. This gives us an opportunity to think about how to continue engaging our participants while finding and making appointments in Cascades.

Fortunately for Washington WIC staff, many of you've been providing participant-centered services for several years. You've created connections with your participants and these relationships will help your participants understand when it takes a little more time for you to help them.

It's OK to let the participant know you're learning something new. For example, "I'm looking for an appointment time for you in our new scheduling system. I appreciate your patience while I'm learning and taking a little longer to make your appointment."

Three things you'll want to know about WIC Connects skills while learning the Cascades Scheduler:

1. **Engaging with your participants is the most important thing.** If you feel frustrated, they'll feel it too. Remember, there's some grace given for learning.
2. **People always appreciate a little humor.** Like the saying goes: "Laugh and the world laughs with you."
3. **What isn't changing about WIC is all the sweet and joyful moments with families and their children.** Stay present, don't be afraid to ask for help, and find something to laugh or be happy about.

We're confident the great customer service you've built with your participants will continue with Cascades and learning a new system.

Tools

The following pages contain tools you may find helpful for learning about appointments and the Master Calendar in Cascades.

TOOL 1: CASCADES APPOINTMENT TYPES

Cascades doesn't have a Flowsheet like Client Services. Instead, Cascades has a really helpful feature that suggests appointment types and default appointment durations.

Cascades also suggests when to schedule the appointment to meet federal processing standards, nutrition education contact requirements, and assure the participant receives food benefits without interruption.



TIP!

There isn't a Presume Eligible appointment in Cascades. When an applicant comes in for this type of appointment, you'll:

- 1. Complete an Initial Certification appointment.**
- 2. Reduce the suggested 30 minute slot to 15 minutes.**
- 3. Schedule the PE-Complete Assessment for the following month.**

The system won't automatically suggest a PE-Complete Assessment appointment, so you'll want to remember to schedule one.

We'll provide a Cascades Steps tool in the Cascades webpage to guide you.



See the next page for a table comparing Client Services and Cascades appointment types.

Tool 1: Cascades Appointment Types

System-defined Appointment Types			
<ul style="list-style-type: none"> • These appointment types are pre-programmed into Cascades. • Cascades suggests one of these appointment types based on the participant's needs. • You can use a system-defined appointment or choose a non-system defined appointment from the drop-down menu. 			
Client Services	Cascades	Default duration	<ul style="list-style-type: none"> • Suggested for: • Suggested Timeframe:
<ul style="list-style-type: none"> • Presume Eligible (PE) • Enroll Infant (EN) • New Certification (NC) 	Initial Certification (IC)	30 mins	<ul style="list-style-type: none"> • Applicants not yet certified. • Current date and Current date + 7 days.
Recertification (RC)	Subsequent Certification (SC)	30 mins	<ul style="list-style-type: none"> • Participants who need to be recertified. • Certification end date minus 10 days and the Certification end date + 7 days.
Second Contact (2C)	Nutrition Education – Individual (NE-I)	15 mins	<ul style="list-style-type: none"> • Participants needing a nutrition education contact. • Next appointment.
Check Pick Up	Food Benefits Issuance (FBI)	15 mins	<ul style="list-style-type: none"> • Participants needing benefits. • Last date to spend of final month of issuance minus 10 days.
Non-system-defined Appointment Types			
<ul style="list-style-type: none"> • Washington WIC added these appointment types to Cascades. • Cascades won't automatically suggest these appointment types, but staff can choose them from the drop-down menu. 			
Client Services	Cascades	Default duration	
Complete Certification (CC)	PE-Complete Assessment	30 minutes	
Registered Dietitian (RD)	Registered Dietitian (RD)	30 minutes	
<ul style="list-style-type: none"> • Health Assessment (HA) • Follow Up (F/U) <ul style="list-style-type: none"> ○ BF and Child HA 	Mid Cert HA	30 minutes	
Class	Nutrition Education - Class	Depends on topic	
Follow Up (F/U)	BFPC	30 minutes	
	Anthro/Lab	15 minutes	
Blocked	Block Appointment Slots	No default duration	

TOOL 2: MASTER CALENDAR COLOR LEGEND

The Master Calendar has many new symbols and color-coding. You can use this tool as a reference when working with the calendar.

Master Calendar Legend		
Icon	Symbol	Definition
Available Time		<ul style="list-style-type: none"> In Month view, this means there's an available time slot that day. In Day view, shows specific available time slot.
Appointment		Means an appointment is scheduled.
Class		Means a Nutrition Education class is scheduled.
Staff Event		Means a staff event is scheduled.
Overbooking Slot		A green to yellow slot means you can overbook. Staff can schedule more than one person to a certain time slot.
Open Access Slot		This is a slot that opens for booking a few days prior to the appointment day.
Blocked Time		The clinic is closed during that time.
Add a Participant		<ul style="list-style-type: none"> Use this button in the Master Calendar/Manage Appointments page to add a participant to a family. Double-click on a blue appointment slot in the Master Calendar to get to this button.
Add a New Family		<ul style="list-style-type: none"> Use this button in the Master Calendar/Manage Appointments page to add new a family. Double-click on a green appointment slot in the Master Calendar to get to this button.
Reload		<ul style="list-style-type: none"> Use this icon in the Clinic Master Calendar to reload the Master Calendar to its initial state.
Refresh		<ul style="list-style-type: none"> Use this icon in Clinic Master Calendar to refresh and show data other clinic staff added.
Previous		<ul style="list-style-type: none"> Use this icon in Clinic Master Calendar to move back to a previous screen. The Back Arrow at the top of the browser page backs you out of Cascades and you will have to log on again.
Select All		<ul style="list-style-type: none"> Use this icon in Clinic Master Calendar to select all scheduled events.
De-select All		<ul style="list-style-type: none"> Use this icon in Clinic Master Calendar to de-select all scheduled events.