



Cascades Steps

Complete Assessment for a Presumed Eligible (PE) Participant



Please Note:

- Don't do a Subsequent Certification when completing the assessment for a PE participant.
- If a PE participant has a miscarriage, Cascades requires you to:
 - Terminate the participant.
 - Complete a Subsequent Certification to enter the participant as a non-breastfeeding postpartum participant.

Steps	Cascades Screen												
<p>1. Open the PE participant file.</p> <p>You'll notice the following:</p> <ul style="list-style-type: none"> • A Family Alert appears when you open the file to let you know the participant has presumptive eligibility. • In Quick Links - Stars and check marks don't appear. • The last dot above the participant icon will be red. 	<p>Family Alerts</p> <p>Presumptive Eligibility for Pregnant Woman SUSAN MEYERS 4/8/2019</p> <p>Quick Links</p> <ul style="list-style-type: none"> New Family Family Search Certification <ul style="list-style-type: none"> Family Demographics Participant Demographics Income Information Health Information Anthro / Lab Family Assessment Dietary & Health Eco-Social Assessment Assigned Risk Factors Certification Signature Certification Summary Issue EBT Card Family Alerts <p>MEYERS Family Family ID: F22700000626 210 MAIN ST PORT ORCHARD, WA 98366</p> <p>SUSAN</p> <p>Certification Details</p> <table border="1"> <tr> <td>Start Date</td> <td>End Date</td> </tr> <tr> <td>4/8/2019</td> <td>6/7/2019</td> </tr> <tr> <td>Priority</td> <td>High Risk</td> </tr> <tr> <td>IV</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> </tr> </table> <p>Certification History</p> <table border="1"> <thead> <tr> <th>Start Date</th> <th>End Date</th> </tr> </thead> <tbody> <tr> <td>4/8/2019</td> <td>6/7/2019</td> </tr> </tbody> </table> <p>Stars and check marks don't appear</p>	Start Date	End Date	4/8/2019	6/7/2019	Priority	High Risk	IV	<input type="radio"/> Yes <input checked="" type="radio"/> No	Start Date	End Date	4/8/2019	6/7/2019
Start Date	End Date												
4/8/2019	6/7/2019												
Priority	High Risk												
IV	<input type="radio"/> Yes <input checked="" type="radio"/> No												
Start Date	End Date												
4/8/2019	6/7/2019												



Cascades Steps

Complete Assessment for a Presumed Eligible (PE) Participant



2. Verify the participant is presumed eligible (if needed):

- Select **Certification Summary** in **Quick Links**.
- Select the **Certification History** bar.
- Look for these things:
 - ✓ **Complete Assessment** is visible but disabled (grayed out).
 - ✓ **Assigned Risk Factors** = 503 Presumptive Eligible.

Quick Links

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

Complete Assessment Terminate Certification Next Certification Due Notice Cancel

TAB 100%

Certification Details

Start Date	End Date
4/8/2019	6/7/2019
Priority	High Risk
IV	<input type="radio"/> Yes <input checked="" type="radio"/> No

Certification History

Start Date	End Date	
4/8/2019	6/7/2019	

Family Assessment Summary

Income Summary

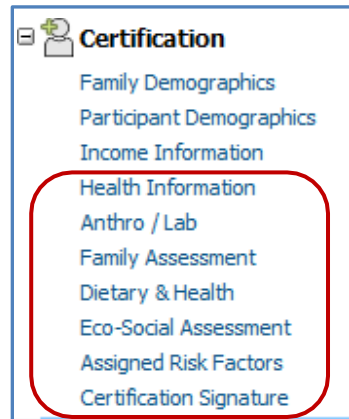
- Family Eligibility: Yes
- Individual Adjunct Eligibility: Yes
- Total Income: \$0.00 (Annual)
- Family Size: 3

Assigned Risk Factors on 4/8/2019

- 503 Presumed Eligible

3. Complete the Certification Assessment.

- Assess Family Demographics, Participant Demographics and the Income Information screen for any missing proofs for the certification and enter them
- **Enter and save** all required information on these screens:
 - ✓ Health Information
 - ✓ Anthro / Lab
 - ✓ Family Assessment
 - ✓ Dietary & Health
 - ✓ Assigned Risk Factors
 - ✓ Certification Signature



Stars and check marks won't be present even though certification information is required on these screens

4. Certification Summary:

- Select **Certification Summary** Quick Link.
- Select the **Complete Assessment** button at the bottom of the screen.

Note: This button is **only available with PE** participants and enabled after you've entered and saved all required information.

See troubleshooting problems at the end if this button is disabled.

The screenshot displays a software interface with a 'Quick Links' sidebar on the left and a main content area on the right. The sidebar contains the following items: 'New Family', 'Family Search', 'Certification' (with a sub-menu), 'Family Demographics', 'Participant Demographics', 'Income Information', 'Health Information', 'Anthro / Lab', 'Family Assessment', 'Dietary & Health', 'Eco-Social Assessment', 'Assigned Risk Factors', 'Certification Signature', 'Certification Summary' (highlighted in blue with a red arrow pointing to it), and 'Issue EBT Card'. The main content area shows a 'Status Message' dialog box with the text 'Participant SUSAN MEYERS was saved successfully.' Below the dialog box are four buttons: 'Complete Assessment' (with a red arrow pointing to it), 'Terminate Certification', 'Next Certification Due Notice', and 'Cancel'. At the bottom of the screen, there is a 'TAB' indicator, a speech bubble icon, and a '100%' zoom level.

<p>5. Certification: The system marks the participant certified.</p> <ul style="list-style-type: none"> The third dot is now green above the participant icon. Staff can now issue multiple months of benefits. The Certification Period is for the full amount of time. <p>Required: Cascades marks the certification complete, but staff must fill in the Care Plan to meet program requirements.</p>	<p>MEYERS Family Family ID: F22700000626 210 MAIN ST PORT ORCHARD, WA 98366</p> <p>Certification Details</p> <table border="1"> <tr> <td>Start Date</td> <td>End Date</td> </tr> <tr> <td>4/8/2019</td> <td>10/31/2019</td> </tr> <tr> <td>Priority</td> <td>High Risk</td> </tr> <tr> <td>IV</td> <td><input type="radio"/> Yes <input checked="" type="radio"/> No</td> </tr> </table> <p>Detailed Participant Information</p> <p>Participant Name: SUSAN MEYERS Participant ID: WA2270001085 Family ID: F22700000626 Category: Pregnant Status: Active/Certified Certification Period: 4/8/2019 - 10/31/2019 Date of Birth: 4/25/2000 Food Issuance Status: Apr 2019 - Available May 2019 - Available Jun 2019 - Available Clinic Name: CHI Franciscan-Harrison Medical Center WIC</p>	Start Date	End Date	4/8/2019	10/31/2019	Priority	High Risk	IV	<input type="radio"/> Yes <input checked="" type="radio"/> No
Start Date	End Date								
4/8/2019	10/31/2019								
Priority	High Risk								
IV	<input type="radio"/> Yes <input checked="" type="radio"/> No								
<p>Troubleshooting Problems:</p> <p>If the Complete Assessment is disabled (grayed out):</p> <ul style="list-style-type: none"> Check all required information is entered (see step 3), including Expected Delivery Date. 	<p>Complete Assessment Terminate Certification Next Certification Due Notice Cancel</p> <p>TAB 100%</p>								

Troubleshooting Problems Con't:

- Under **Assigned Risk Factors**, there must be a risk factor instead of 503 – Presumed Eligible (PE):
 - ✓ Delete PE risk factor.
 - ✓ Add an appropriate risk factor.
 - ✓ If no other risks apply, select **401-Not Meeting Dietary Guidelines**.
 - ✓ Select **Save**.
- Repeat Step 4:
 - ✓ Select **Certification Summary**.
 - ✓ Select **Complete Assessment**.

Certification

- Family Demographics
- Participant Demographics
- Income Information
- Health Information
- Anthro / Lab
- Family Assessment
- Dietary & Health
- Eco-Social Assessment
- Assigned Risk Factors**
- Certification Signature
- Certification Summary

Assigned Risk Factors

Quick Entry

Risk Code: Description:

Risk Code	Description
503	Presumed Eligible

- Eco-Social Assessment
- Assigned Risk Factors
- Certification Signature
- Certification Summary**
- Issue EBT Card

Complete Assessment
Terminate Certification
Next Certification Due Notice
Cancel



Cascades Steps

Complete Assessment for a Presumed Eligible (PE) Participant



This institution is an equal opportunity provider.
Washington WIC doesn't discriminate.

To request this document in another format, call 1-800-841-1410.
Deaf or hard of hearing customers, please call 711 (Washington Relay)
or email wic@doh.wa.gov.



DOH 961-1711 January 2023

