

# CASCADES

## WIC MIS

CLINIC STAFF SELF-STUDY TRAINING WORKBOOK



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## DOCUMENT INFORMATION

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### Revisions

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1.0	06/22/2018	Nick Walsh	Initial Draft
2.0	08/02/2018	Nick Walsh	Remove graphics and switch the order of screen id's and task.
3.0	09/18/2018	Nick Walsh	Added a scenario for 6 month old Health Assessment.
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# 1. INTRODUCTION

This document provides workbook activities to complete after viewing the CBT's and prior to attending Basic Training. There are also post-training activities to be completed after returning from Basic Training.

Note: The Cascades Sandbox may not exactly reflect Cascades.

## 1.1. Document Organization

This document is divided into the following sections:

### [Section 1 – Prerequisite Steps Required to Gain Access to Cascades Sandbox and Logging into Cascades Sandbox](#)

Steps the Coordinator (Clinic Administration) and staff need to take before accessing the Cascades Sandbox to complete the Self Study Workbook.

Describes the steps for logging into the Cascades Sandbox.

### [Section 2 – Participant Scenario Log and WIC Scenarios](#)

Presents real-time WIC scenarios that learners will perform in the Cascades Sandbox environment. The overall goal is for the learner to successfully complete each WIC scenario on their own by applying knowledge gained from the CBT. The post-activities scenarios reflect what was shared with the learner in Basic Training. This provides learners with opportunity to practice what they have learned in a self-study environment.

**Note:** Please write down your Family ID and last name in the Participant Scenario Log for each scenario. Many scenarios will utilize the same family. Also, it would be a good practice to choose unique names that you will remember to avoid duplicating family names that your co-workers might have created.

### [Section 3 – Exhibits](#)

Includes references to supporting documentation and examples of training materials.

## 1.2. Logging into the Cascades Sandbox with Test SAW Authentication

### ***1.2.1. Prerequisites to Register for the Cascades Sandbox via Test Secure Access Washington (SAW)***

Cascades will be hosted in the Cloud; this provides a more secure system for the people we serve. We'll access Cascades through Secure Access Washington (SAW).

However, our first exposure with SAW and Cascades is through a Test SAW account (not real) and the Cascades Sandbox (also, not real). The steps we take to gain access to Test SAW and the Cascades Sandbox will be very close to the steps you'll take when it comes time to gain access to SAW (real) and Cascades (live participant data).

We gave coordinators the Administrative Role in the Cascades Sandbox. The coordinator needs to be the very first person to have access to the Cascades Sandbox for their agency. The coordinator assures all staff have a username in the Cascades Sandbox. Many staff usernames are already in the Sandbox. The state office provided an initial upload of clinic staff before the pilot. Staff usernames must be in the Cascades Sandbox to allow linking to their Test SAW account.

The Coordinator can provide you with Handout 2, the Secure Access Code, and your User Name.

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## Handout 2: Test Secure Access Washington (SAW) User Account

Set up a Test SAW account. If you have a real SAW account that you use for your business or Department of Licensing, etc., the Test SAW is not the same thing.

All staff need to go through the process of registering for a Test SAW account in order to gain access to the Cascades Sandbox. Follow the instructions very closely.

If you need support with any of these steps or a copy of handouts, please contact Cascades Support.

**NOTE:** Test SAW Maintenance is done on the first Tuesday of the month from 8:00 am to 1:00 pm. Due to the maintenance, Test SAW and the Cascades Sandbox will not be accessible during this time.

### Definitions:

**Cascades Sandbox:** This is a version of Cascades that allows staff to practice without using real participant data. You'll use the Sandbox and workbook after viewing the Computer Based Trainings (CBTs) in the LMS.

**Test Secure Access Washington (SAW):** The real SAW doesn't allow us to link to fake data. Therefore, Test SAW gives us access to the Cascades Sandbox, since we aren't working or creating real data.

### 1.2.2. Login Instructions for the Cascades Sandbox

Complete the following steps to log in using Secure Access Washington (SAW):

1. Click on the Cascades Sandbox icon (Figure 1) on the desktop



Figure 1 - Cascades Sandbox Shortcut

2. Enter your Test SAW User ID and Password. (Figure 2)

**Note:** You must have previously registered a user account in Test SAW.

- Multifactor - Authentication (Figure 3)
- Cascades Application (Figure 4)
- Cascades Home Page (6)

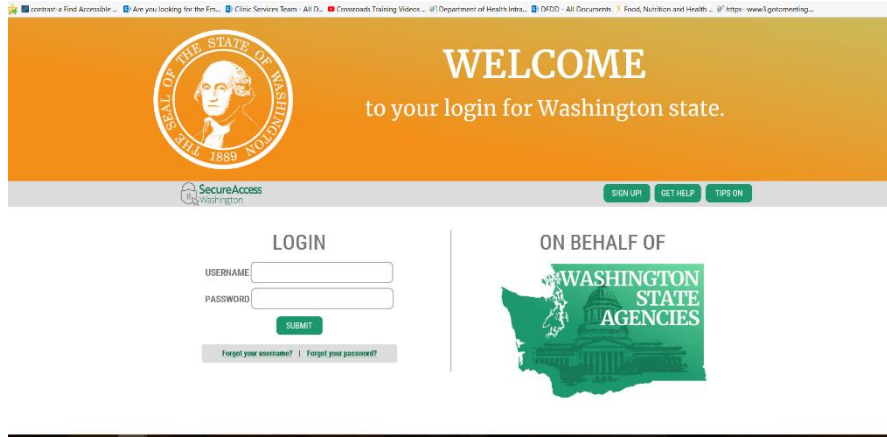


Figure 2 – Test SAW Login

- 3. Need to select how to get the required code: phone, text or email.

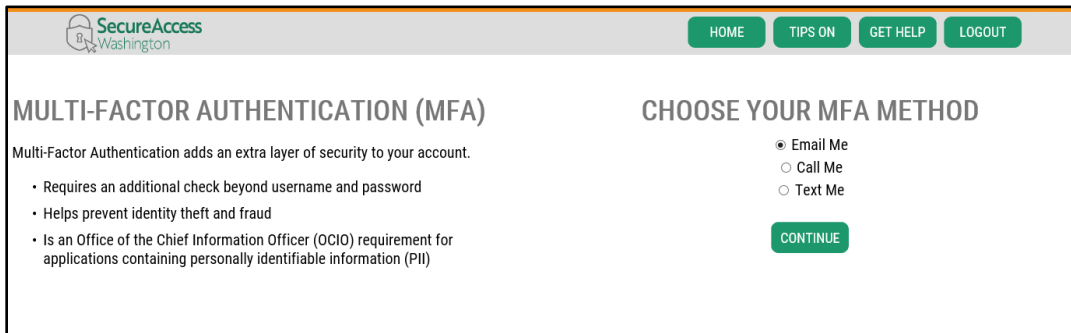


Figure 3 - Multi-factor Authentication

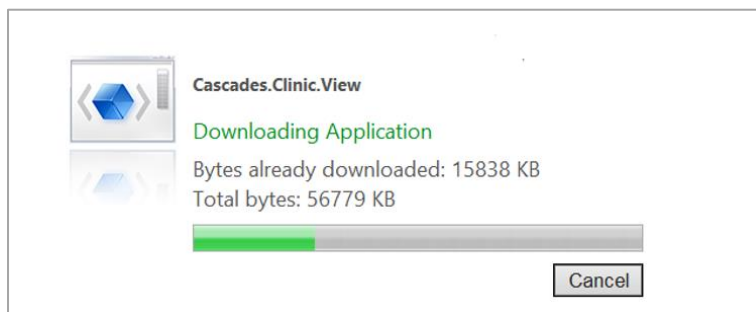


Figure 4 - Cascades Downloading

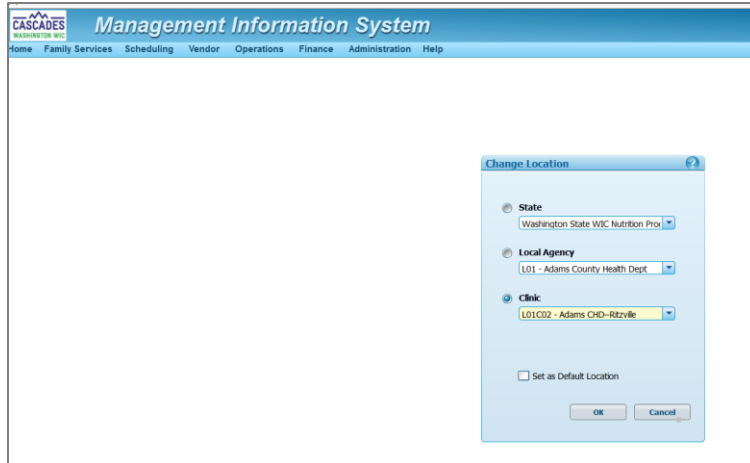


Figure 5 –Change Location

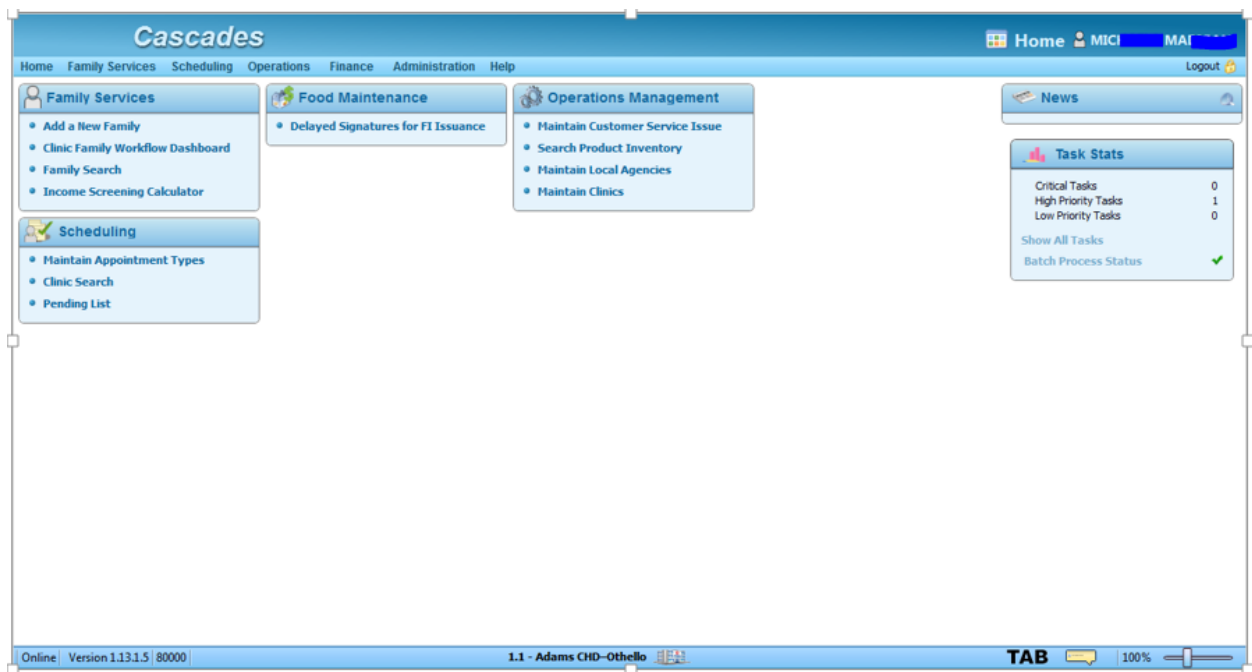


Figure 6 -Cascades Home Page



## 2. PARTICIPANT SCENARIO LOG

### 2.1. Participant Scenario Log

Family ID / Last Name:	Test Case ID
	3.1.1
	3.1.2
	3.1.3
	3.1.4
	3.1.5
	3.1.6
	3.1.7
	3.1.8
	3.1.9
	3.1.10
	3.1.11
	3.1.12
	3.1.13
	3.1.14
	3.1.15
	3.1.16
	4.1.1
	4.1.2 N/A
	4.1.3
	4.1.4 N/A
	4.1.5
	4.1.6 N/A
	4.1.7
	4.1.8
	4.1.9
	4.1.10
	4.1.11
	4.1.12
	4.1.13
	4.1.14

Family ID / Last Name:	Test Case ID
	4.1.15
	4.1.16
	4.1.17

## 2.2. Child’s Weight and Height by Age

Stage	Age	HEIGHT		WEIGHT	
		Boys	Girls	Boys	Girls
Baby	Birth	19.1 - 20.1 inches	18.9 - 19.8 inches	6.7 - 8.1 pounds	6.5 - 7.8 pounds
Baby	3 months	23.6 - 24.7 inches	23.0 - 24.1 inches	13.0 - 15.2 pounds	11.8 - 14.0 pounds
Baby	6 months	26.1 - 27.2 inches	25.3 - 26.5 inches	16.2 - 18.8 pounds	14.8 - 17.5 pounds
Baby	9 months	27.7 - 28.9 inches	27.0 - 28.3 inches	18.2 - 21.1 pounds	16.7 - 19.7 pounds
Toddler	12 months	29.2 - 30.5 inches	28.5 - 29.8 inches	19.8 - 22.9 pounds	18.2 - 21.4 pounds
Toddler	15 months	30.5 - 31.8 inches	29.9 - 31.2 inches	21.1 - 24.5 pounds	19.5 - 23.0 pounds
Toddler	18 months	31.7 - 33.1 inches	31.0 - 32.5 inches	22.4 - 26.0 pounds	20.8 - 24.5 pounds
Toddler	21 months	32.7 - 34.3 inches	32.1 - 33.8 inches	23.6 - 27.5 pounds	22.0 - 26.0 pounds
Preschooler	24 months	33.8 - 35.4 inches	33.2 - 34.9 inches	24.8 - 28.9 pounds	23.3 - 27.5 pounds
Preschooler	27 months	34.1 - 36.1 inches	33.7 - 35.6 inches	27.0 - 31.2 pounds	25.8 - 30.0 pounds
Preschooler	30 months	35.0 - 37.0 inches	34.6 - 36.6 inches	27.8 - 32.2 pounds	26.7 - 31.1 pounds
Preschooler	33 months	35.8 - 37.8 inches	35.4 - 37.4 inches	28.6 - 33.2 pounds	27.6 - 32.3 pounds
Preschooler	36 months	36.5 - 38.6 inches	36.0 - 38.1 inches	29.5 - 34.3 pounds	28.4 - 33.4 pounds
Preschooler	4 years	39.2 - 41.5 inches	38.6 - 41.0 inches	33.3 - 39.1 pounds	32.2 - 38.5 pounds
Big Kid	5 years	41.7 - 44.2 inches	41.3 - 43.8 inches	37.5 - 44.7 pounds	36.3 - 44.0 pounds
Big Kid	6 years	44.2 - 46.9 inches	43.9 - 46.7 inches	41.9 - 50.6 pounds	40.8 - 50.0 pounds
Big Kid	7 years	46.6 - 49.5 inches	46.5 - 49.4 inches	46.5 - 56.8 pounds	45.6 - 56.6 pounds
Big Kid	8 years	48.9 - 52.0 inches	48.8 - 51.9 inches	51.5 - 63.6 pounds	50.9 - 64.3 pounds

Figure 6 - Child's Weight and Height by Age

### 3. PRACTICE SCENARIOS

The following scenarios do not include all the details you'll need to complete the activities. You'll be required to come up with most of the information about your participant(s). The following scenarios were demonstrated in the computer-based training (CBT) units:

#### 3.1.1. *Certify a Pregnant Woman and Child*

<b>Scenario</b>	A pregnant woman comes into a clinic to apply for WIC Benefits for herself and her child. Create a family and certify the woman and child.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Add the pregnant woman by selecting Add a New Family (<b>Note:</b> Required fields are indicated with a yellow star.)</li> <li>2. Add the child in the Add Participant container. Remember to add the names of the applicants on the log (page 5).</li> <li>3. Complete the Quick Links to certify the woman and child.</li> </ol>
<b>Data/Demographics</b>	<ul style="list-style-type: none"> <li>♦ Woman's DOB: 08/11/1988</li> <li>♦ Child's DOB: 01/05/2015</li> <li>♦ Infant's Expected Delivery: 4 weeks from today</li> <li>♦ Proof of Income: Monthly LES paystub/military stub of \$1150</li> <li>♦ Anthro / Lab (woman): 12 Hgb</li> <li>♦ Anthro / Lab (child): 13 Hgb</li> <li>♦ Other Required Fields: Learner choice</li> </ul>

#### 3.1.2. *Create a Care Plan for a Pregnant Woman and Child*

<b>Scenario</b>	Using the participants from 3.1.1, complete a nutrition education contact, set a goal and a referral for the woman and child.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Complete a Nutrition Education contact for the woman and child.</li> <li>2. Set goals for the woman and child (Learner's Choice).</li> <li>3. Make a referral for the woman and child (Learner's Choice).</li> </ol>
<b>Data/Demographics</b>	♦ N/A

#### 3.1.3. *Prescribe Food and Issue Benefits for a Pregnant Woman and Child*

<b>Scenario</b>	Using the participants from 3.1.1, prescribe food and issue benefits.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Under the Issue Benefits quick link, open the Prescribe Food link and review the default food prescription the woman and save. Do the same steps for the child.</li> <li>2. Select the Issue Food Instruments quick link and populate the check box under Family Issuance Members. Click the Issue button on the bottom right of the screen.</li> </ol>
<b>Data/Demographics</b>	♦ N/A

### 3.1.4. Schedule the Next Appointment for Pregnant Woman and Child

<b>Scenario</b>	Using the participants from 3.1.1, schedule a subsequent certification and a Nutrition education appointment in 3 months.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Schedule the subsequent certification for the woman and nutrition education appointment in 3 months for the child.</li> <li>2. Click on the Quick Appointments link and filter your search for a slot for food benefit issuance for 3 months in the future.</li> <li>3. Book an appointment for the family for benefit issuance.</li> </ol>
<b>Data/Demographics</b>	♦ N/A

### 3.1.5. Certify a Breastfeeding Woman and Infant

<b>Scenario</b>	A breastfeeding woman comes into a clinic to apply for WIC Benefits for herself and her infant. Create a family and certify the woman and infant.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Add a fully-breastfeeding woman by selecting New Family. (<b>Note:</b> Required fields are indicated with a yellow star.)</li> <li>2. Add the infant in the Add Participant container. Complete the Quick Links to certify the woman and infant.</li> </ol>
<b>Data/Demographics</b>	<ul style="list-style-type: none"> <li>♦ Woman's DOB: 09/07/1990</li> <li>♦ Infant's DOB: 2 weeks ago from today</li> <li>♦ Proof of Income: Monthly LES paystub/military stub of \$950</li> <li>♦ Anthro / Lab (woman): 12 Hgb</li> <li>♦ Anthro / Lab (infant): Select an Exempt Reason</li> <li>♦ Fully breastfeeding/no formula</li> <li>♦ Other Required Fields: Learner choice</li> </ul>

### 3.1.6. Create Care Plans for a Breastfeeding Woman and an Infant

<b>Scenario</b>	Using the participants from 3.1.5, create a Care Plan for each family member. Please add at least one Nutrition Education topic for the woman.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Select a nutrition education topic to discuss with the woman in the Nutrition education screen.</li> <li>2. Set goals for woman and infant (Learner's Choice).</li> <li>3. Make a referral for the woman and infant (Learner's Choice).</li> </ol>
<b>Data/Demographics</b>	♦ N/A

### 3.1.7. *Prescribe Food and Issue Benefits for a Breastfeeding Woman and Infant*

<b>Scenario</b>	Using the participants from 3.1.5, prescribe food and issue benefits.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Under the Issue Benefits quick link, open the Prescribe Food link and review the default food prescription for the woman and save.</li> <li>2. Select the Issue Food Instruments quick link and populate the check box under Family Issuance Members. (<b>Note:</b> The baby will not receive benefits because of fully breastfeeding status.) Click the Issue button on the bottom right of the screen.</li> </ol>
<b>Data/Demographics</b>	♦ N/A

### 3.1.8. *Schedule the Next Appointment for a Breastfeeding Woman and an Infant*

<b>Scenario</b>	Using the participants from 3.1.5, schedule an appointment for benefit issuance and nutrition education appointment in 3 months.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Schedule the food benefit issuance and nutrition education appointments in 3 months for the woman and infant.</li> <li>2. Click on the Quick Appointments link and filter by start and end date for a week that is 3 months in the future.</li> <li>3. Select the Add check box for each family member you're scheduling the appointment for, populate the appointment type for benefit issuances, set the duration for 15 minutes, and search.</li> <li>4. Select the radio button for desired time slot, select In Person as the Contact Method, and then click the Book button.</li> </ol>
<b>Data/Demographics</b>	♦ N/A

### 3.1.9. *Certify a Non-Breastfeeding Woman and Infant*

<b>Scenario</b>	A non-breastfeeding woman comes into a clinic to apply for WIC Benefits for herself and her infant. Create a family and certify the woman and infant.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Add non-breastfeeding woman by selecting New Family. (<b>Note:</b> Required fields are indicated with a yellow star.)</li> <li>2. Add the infant in the Add Participant container. Complete the Quick Links to certify the woman and infant.</li> </ol>
<b>Data/Demographics</b>	<ul style="list-style-type: none"> <li>♦ Woman's DOB: 09/07/1990</li> <li>♦ Infants DOB: 3 months ago from today</li> <li>♦ Proof of Income: Monthly LES paystub/military stub of \$900</li> <li>♦ Anthro / Lab (woman): 12 Hgb</li> <li>♦ Anthro / Lab (infant): Select an Exempt Reason</li> <li>♦ Other Required Fields: Learner choice</li> </ul>

**3.1.10. Create Care Plan for a Non-Breastfeeding Woman and Infant**

<b>Scenario</b>	Using the participants from 3.1.9, create a Care Plan for each family member. Please add at least one Nutrition Education topic.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Select a nutrition education topic to discuss with the woman in the Nutrition education screen.</li> <li>2. Set goals for the woman and infant (Learner's Choice).</li> <li>3. Make a referral for the woman and infant (Learner's Choice).</li> </ol>
<b>Data/Demographics</b>	♦ N/A

**3.1.11. Prescribe Food and Issue Benefits for a Non-Breastfeeding Woman and Infant**

<b>Scenario</b>	Using the participants from 3.1.9, prescribe food and issue benefits.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Under the Issue Benefits quick link, click the Prescribe Food link, review the default food prescription for the woman, and then save. Do the same steps for the infant.</li> <li>2. Select the Issue Food Instruments quick link and select the check box under Family Issuance Members. Click the Issue button on the bottom right of the screen.</li> </ol>
<b>Data/Demographics</b>	♦ N/A

**3.1.12. Schedule Next Appointment for a Non-Breastfeeding Woman and Infant**

<b>Scenario</b>	Using the participants from 3.1.9, schedule an appointment for benefit issuance and Mid-Cert Health Assessment appointment in 3 months.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Schedule the Mid-Cert Health Assessment and food benefit issuance appointments in 3 months for the infant.</li> <li>2. Click on the Quick Appointments link and filter by start and end date for a week that is 3 months in the future.</li> <li>3. Select the Add check box for the family member you're scheduling the appointment for, populate the appointment type for benefit issuances, set the duration for 15 minutes, and then search.</li> <li>4. Select the radio button for desired time slot, select In Person as the Contact Method, and then click the Book button.</li> </ol>
<b>Data/Demographics</b>	♦ N/A

**3.1.13. Certify a Foster Child in a Foster Family**

<b>Scenario</b>	A foster family comes into a clinic to apply for WIC Benefits for a foster child. Create a foster family and certify the foster child.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Add a foster family by selecting New Family. (<b>Note:</b> Required fields are indicated with a yellow star.)</li> <li>2. Add the child in the Add Participant container. Complete the Quick Links to certify the foster child.</li> </ol>
<b>Data/Demographics</b>	<ul style="list-style-type: none"> <li>◆ Foster Guardian DOB: 04/01/1988</li> <li>◆ Child's DOB: 3 years from today's date</li> <li>◆ Income: Foster Care documentation</li> </ul>

**3.1.14. Create a Care Plan for a Foster Child in a Foster Family**

<b>Scenario</b>	Using the participants from 3.1.13, create a Care Plan for the foster child.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Select a nutrition education topic for the foster child to discuss with the caretaker and document in the Nutrition education screen as Complete.</li> <li>2. Set goals for the foster child (Learner's Choice).</li> <li>3. Make a referral for the foster child (Learner's Choice).</li> </ol>
<b>Data/Demographics</b>	◆ N/A

**3.1.15. Prescribe Food and Issue Benefits for a Foster Child in a Foster Family**

<b>Scenario</b>	Using the participants from 3.1.13, prescribe food and issue benefits.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Under the Issue Benefits quick link, click the Prescribe Food link, review the default food prescription, and then save.</li> <li>2. Click the Issue Food Instruments quick link and select the check box for the foster child. Click the Issue button on the bottom right of the screen.</li> </ol>
<b>Data/Demographics</b>	◆ N/A

**3.1.16. Schedule the Next Appointment for a Foster Child in a Foster Family**

<b>Scenario</b>	Using the participants from 3.1.13, schedule an appointment for Nutrition education topic and benefit issuance in 3 months.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Schedule a Nutrition education topic and food benefit issuance appointment in 3 months for the foster child.</li> <li>2. Click the Quick Appointments link and filter by start and end date for a week that is 3 months in the future.</li> <li>3. Select the Add check box for the appointment you are scheduling the foster child for, populate the appointment type for Nutrition Education and Benefit Issuance, set the duration for 15 minutes, and then search.</li> <li>4. Select the radio button for desired time slot, select In Person as the Contact Method, and then click the Book button.</li> </ol>
<b>Data/Demographics</b>	♦ N/A



## 4. POST TRAINING: PRACTICE SCENARIOS

The following list includes the post- training practice scenarios:

Note: if you need a future schedule in the Master Calendar, ask you're Champions

### 4.1.1. *Block an Appointment Slot with a Booked Appointment*

<b>Scenario</b>	For this scenario, use the Family ID from scenario 3.1.12. A clinic staff member has to reschedule a participant's appointment because the staff member will be out of the office the day of the appointment. Using the Family Appointment quick link, locate the appointment from 3.1.12. After talking with the participant, reschedule the appointment for the next day. Once the appointment is scheduled, block the slot that was rescheduled.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Under the Scheduling System, click the Family Appointments quick link.</li> <li>2. Locate the appointment and reschedule for the next day.</li> <li>3. Select Block Appointment Slots on the Scheduling menu and complete the necessary information to block the previous appointment slot.</li> </ol>
<b>Data/Demographics</b>	♦ N/A

### 4.1.2. *Block an Open Appointment Slot(s)*

<b>Scenario</b>	An internal meeting is needed for clinic staff for a day in the future for 1 hour. Use the Clinic Master Calendar to review the clinic schedule for the desired day in the future and block a 1-hour time period.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Review the master calendar and pick an hour to block in the future.</li> <li>2. Select Block Appointment Slots on the Scheduling menu and complete the necessary information to block the desired slot.</li> </ol>
<b>Data/Demographics</b>	♦ N/A

### 4.1.3. *Reschedule an Appointment*

<b>Scenario</b>	The participant from scenario 3.1.5 walks into a clinic and asks to reschedule an appointment due to a conflict with a doctor appointment.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. From the Home screen, perform a family search using the Family ID of the family from scenario 3.1.5.</li> <li>2. Click the Family Appointment Quick link to view appointments to be rescheduled.</li> <li>3. Search by appointment type, select the radio button for the new time slot, select a contact method, select a reschedule reason, and then click the Book button to reschedule.</li> </ol>
<b>Data/Demographics</b>	♦ N/A

#### 4.1.5. *Cancel an Appointment*

<b>Scenario</b>	The participant from scenario 3.1.5 walks into a clinic and asks to cancel an appointment.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. From the Home screen, perform a family search using the Family ID of the family from scenario 3.1.5.</li> <li>2. Click the Family Appointment Quick link to view the appointment to cancel.</li> <li>3. Click the Cancel option.</li> <li>4. Select the appointment to cancel and select a Cancellation Reason.</li> <li>5. Click the Cancel Appointment(s) option.</li> </ol>
<b>Data/Demographics</b>	♦ N/A

#### 4.1.6. *Create an Appointment Slot*

<b>Scenario</b>	In this scenario, you will need to create a time slot. This function provides the user an alternative to using templates when needing to add slots for a single day.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Click the Master Calendar quick link under the Scheduling System.</li> <li>2. Double-click the day to create a time slot. The Day view displays for the day selected.</li> <li>3. In the Quick Links, click Create Time Slot.</li> <li>4. Select the desired configurations in the Add Master Calendar Slot pop-up window.</li> <li>5. Click Save.</li> </ol>
<b>Data/Demographics</b>	♦ N/A

#### 4.1.7. *Subsequent Certification of a Pregnant Woman as Breastfeeding and Certify Her Infant*

<b>Scenario</b>	Using the participant from 3.1.1, subsequently certify a breastfeeding woman and newborn infant.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Log in to your clinic.</li> <li>2. Use the participant from 3.1.1.</li> <li>3. Add the infant to the family as a participant using the Add Participant container.</li> <li>4. Complete the steps to certify the infant.</li> <li>5. Complete the steps to subsequently certify the woman.</li> </ol>
<b>Data/Demographics</b>	♦ N/A

#### 4.1.8. *Transfer a Foster Child into Different Family*

<b>Scenario</b>	Transfer the child from scenario 3.1.13 into a different family.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Search for the Foster Child from scenario 3.1.13.</li> <li>2. If there are future food benefits, go to Food Instrument List and void all future benefits.</li> <li>3. Click Transfer Between Families under Transfers on the Family Services menu.</li> <li>4. Check "Child" in the Individual's box inside the In-State Transfer box.</li> <li>5. Select the family to receive the foster child.</li> <li>6. Click Transfer.</li> <li>7. Review and confirm the transfer.</li> <li>8. Go back to the initial family (where the child transferred from) and re-issue the family's benefits that were voided when you voided the child's benefits (if current benefits in #2).</li> </ol>
<b>Data/Demographics</b>	♦ N/A


#### 4.1.9. *Transfer a Child from a Family to a Foster Family*

<b>Scenario</b>	Transfer the child from scenario 3.1.1 into the Foster Family in scenario 3.1.13.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Search for the Child from scenario 3.1.1.</li> <li>2. Click the Food Instrument List quick link and void all future benefits.</li> <li>3. Click Transfer Between Families under Transfers on the Family Services menu.</li> <li>4. Check "Child" in the Individual's box inside the In-State Transfer box.</li> <li>5. Select the family to receive the child.</li> <li>6. Select Transfer.</li> <li>7. Review and confirm the transfer.</li> <li>8. Go back to the initial family (where the child transferred from) and re-issue the family's benefits that were voided when you voided the child's benefits</li> </ol>
<b>Data/Demographics</b>	♦ N/A


#### 4.1.10. Substitutions initial prescription – Yogurt for Milk

<b>Scenario</b>	A non-breastfeeding woman comes into a clinic to sign up for WIC benefits. She explains she would like to have yogurt instead of milk. The staff needs to substitute yogurt for milk in her food prescription. ( <b>Note:</b> This is for a current-day substitution, to make the substitution permanent you will need to change the food prescription items and save.)
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Create and certify a new non-breastfeeding woman with an infant 2-weeks old, then tailor her initial food prescription with alternatives for milk by substituting 32 ounces of yogurt for 1 quart of milk.</li> <li>2. Save the prescription screen.</li> </ol>
<b>Data/Demographics</b>	<ul style="list-style-type: none"> <li>♦ Woman's DOB: 08/11/1988</li> <li>♦ Infant's Age: 2 weeks old today</li> <li>♦ Proof of Income: bi-weekly pay stub of \$576.25</li> </ul>

#### 4.1.11. Substitutions modify existing prescription – Tofu for Yogurt

<b>Scenario</b>	Use the child participant in scenario 4.1.9 to substitute one 32-ounce yogurt container with 1lb. of tofu. ( <b>Note:</b> This is for a current-day substitution, to make the substitution permanent you will need to change the food prescription items and save.)
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Start on the Replace Current Benefits screen.</li> <li>2. Click Change Rx button.</li> <li>3. Click the  button next to Food Prescription date.</li> <li>4. Add 1 pound of tofu in the Add Item to Food Prescription box.</li> <li>5. Adjust the milk quantity.</li> <li>6. Click Save.</li> </ol>
<b>Data/Demographics</b>	♦ N/A

#### 4.1.12. Replacement modify existing prescription – Soy for Milk

<b>Scenario</b>	Use the woman participant in scenario 3.1.1 to replace 2 gallons of low-fat milk with 2 gallons of Soy milk. ( <b>Note:</b> Due to system constraints this exercise needs to be performed on a subsequent day after 3.1.1 was completed to allow for a new prescription to replace Soy for Milk.)
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Start on the Replace Current Benefits screen.</li> <li>2. Click the Change Rx button.</li> <li>3. Click the  button next to Food Prescription date.</li> <li>4. Save new prescription date.</li> <li>5. Reduce Milk by 2 gallons and add 2 gallons of Soy milk.</li> </ol>
<b>Data/Demographics</b>	♦ N/A

**4.1.13. Formula exchanges**

<b>Scenario</b>	Use the participant in scenario 3.1.9 to perform a formula exchange. ( <b>Note:</b> Due to system constraints this exercise needs to be performed on a subsequent day after 3.1.9 was completed to allow for a new prescription to perform a formula exchange.)
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Choose the product you wish to exchange and create (prescribe) a new prescription.</li> <li>2. Go to the Exchange/Increase Formula screen.</li> <li>3. In the Select the Formula Being Returned box, select the Food Category, Food Subcategory, and Quantity from the EBT account.</li> <li>4. In the Select the Replacement Formula box, select the Food Category and Food Subcategory of the formula to be exchanged.</li> <li>5. Click Save.</li> </ol>
<b>Data/Demographics</b>	♦ N/A

**4.1.14. Add or Increase Formula**


<b>Scenario</b>	Use the test case from scenario 4.1.9 and issue benefits to the infant. In this scenario add a can of formula to the infant's food package.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. After prescribing formula to the infant, go to the Exchange/Increase screen to add a can of formula.</li> <li>2. Then go to the Food Instrument List and search for the most recent date and serial number.</li> <li>3. Click the serial number and verify the correct details for the formula display.</li> </ol>
<b>Data/Demographics</b>	♦ N/A

**4.1.15. Food Package for Breastfeeding infants in first 30 days**

<b>Scenario</b>	Use the participant from scenario 3.1.5 to complete the following scenario. A fully breastfeeding woman and her 2-week-old newborn come into a clinic needing to receive some formula because the woman is not producing enough milk. The staff will change the breastfeeding amount from fully breastfeeding to partially to be able to add a can of formula for the baby.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Search for the family from scenario 3.1.5.</li> <li>2. Go to the Health Information screen and indicate that the infant is drinking a small amount of formula.</li> <li>3. The woman changes to partially breastfeeding by changing to a small amount of formula. (<b>Note:</b> Do the infant's health information before the woman's.)</li> <li>4. Go to the food prescription screen and add a prescription for the infant.</li> <li>5. Once you have the infant's prescription saved, go to the quick link for exchange increase.</li> <li>6. At the bottom of the Exchange/Increase screen, select the food category and subcategory of the formula you added to the infant's prescription. The only formula available should be the one added to the infant's prescription.</li> </ol>

<b>Data/Demographics</b>	◆ N/A
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#### 4.1.16. Exchange/Replace with Special Formula

<b>Scenario</b>	Using the participant in scenario 3.1.9, replace the current formula with a formula which requires medical documentation. ( <b>Note:</b> Due to system constraints this exercise needs to be performed on a subsequent day after 3.1.1 was completed to allow for a new prescription to replace standard formula with a Special Formula.)
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Start at the Prescribe Food screen.</li> <li>2. Click the  button next to Food Prescription date. Save new prescription date.</li> <li>3. Add the new Exempt Infant Formula with the current quantity of the existing formula.</li> <li>4. A Medical Documentation popup displays when the special formula is added. Complete the required information (doctor's name, phone number, and "N/A" for Diagnosis code).</li> <li>5. Click Save.</li> <li>6. Delete the old formula and click Save.</li> <li>7. Navigate to the Exchange/Increase screen and populate the quantity of the formula to be returned from the EBT account and input new special formula to be added to the EBT account.</li> </ol>
<b>Data/Demographics</b>	♦ N/A

**4.1.17. Infant (6-month old) Health Assessment**

<b>Scenario A</b>	A woman moves to Washington and comes into the local WIC clinic to request WIC benefits. She has a 6-7 month old infant and needs to be VOC Transfer in.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Add a non-breastfeeding woman and 6-7 month old infant into the new Washington clinic.</li> <li>2. Select the Transfer option under the Family Services drop down.</li> <li>3. Select the Transfer In option.</li> <li>4. Update the required fields on the Transfer Into State screen for the woman and click the Transfer In button.</li> <li>5. Repeat the process for the infant.</li> </ol>
<b>Data/Demographics</b>	<ul style="list-style-type: none"> <li>◆ Woman's DOB: 8-11-1985</li> <li>◆ Infant DOB: choose a date that will make the infant 6-7 months old</li> </ul>
<b>Scenario B</b>	Use the participant in scenario (A) 4.1.17 . During the Mid-Cert Health Assessment appointment, perform the necessary steps required to do a mid-certification health assessment on the infant.
<b>Tasks</b>	<ol style="list-style-type: none"> <li>1. Update Health Information.</li> <li>2. Update Anthro/Lab.</li> <li>3. Update Family Assessment.</li> <li>4. Update Dietary &amp; Health.</li> <li>5. Update Care Plan Summary.</li> <li>6. Add Free-form Goal for the infant.</li> <li>7. Update Referral for Immunizations and Food Bank</li> </ol>
<b>Data/Demographics</b>	◆ N/A



## 5. EXHIBITS/CHEAT SHEETS

### 5.1. Special Keys

Cascades provides for the use of special keystroke combinations for various purposes. (See Figure 7.)

Cascades System Key Mappings			
UI Element	Function	Modifier	Key
Date Picker	Set to today's date	Ctrl+Shift	T
Date Picker	Show calendar	Ctrl	Down Arrow
Date Picker	Show calendar	Ctrl	C
Tab Navigation State	Set to Standard tab navigation		ESC
Tab Navigation State	Set to Error validation tabbing	Ctrl+Shift	E
Tab Navigation State	Set to Required field tabbing	Ctrl+Shift	R
Validation Summary	Minimize/Restore	Ctrl+Alt	E
Datagrid	Toggle floating details on/off	Ctrl+Shift	V
Datagrid	Delete a row (select row first)		DEL
Flippy Page	Switch to prev page	Ctrl+Shift	Left Arrow
Flippy Page	Switch to next page	Ctrl+Shift	Right Arrow
Slider Control	Close slider	Ctrl+Shift	Left Arrow
Slider Control	Open slider	Ctrl+Shift	Right Arrow
Slider Control	Move all items to Target list	Ctrl+Shift	M
Slider Control	Clear all selected items	Ctrl+Shift	C
Slider Control	Set focus to Target list	Ctrl+Shift	T
Slider Control	Set focus to Source list	Ctrl+Shift	S
Pop-up Windows, Messages, and Sticky Notes	Close all pop-ups (including pop-up windows, messages, and sticky notes)		ESC

Figure 7 - Special Keystroke Combinations

### 5.2. Keyboard Shortcuts and Helpful Hints

Pressing the Alt key gives the menu bar keyboard focus and selects the Home menu. Once the menu bar has keyboard focus, the following actions are available:

- ◆ To select the menu to the right of the selected menu, press the Right-arrow key on the keyboard. (If a sub-menu is selected but not displayed, pressing the Right-arrow key displays the sub-menu instead.)
- ◆ To select the menu to the left of the selected menu, press the Left-arrow key on the keyboard. (If a sub-menu displayed, pressing the Left-arrow hides the sub-menu instead.)
- ◆ To display the selected menu, press the Up-arrow or Down-arrow key. (The command link at the top of the menu selected by default.)
- ◆ To display the selected menu or the dashboard for the system module, press the Enter key.
- ◆ To select a menu item below a selected item, press the Down-arrow key.
- ◆ To select a menu item above a selected item, press the Up-arrow key.
- ◆ To display a selected sub-menu, press the Right-arrow key.

- ◆ To hide a displayed sub-menu, press the Left-arrow key.

When the menu bar has keyboard focus, pressing the Alt key on the keyboard returns keyboard focus to the screen or popup in the content area.

When working with a date picker, the following options are available using the keyboard:

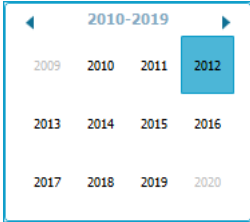
- ◆ Press the Left-arrow key to move the selection to the previous day.
- ◆ Press the Right-arrow key to move the selection to the following day.
- ◆ Press the Up-arrow key to move the selection to the day 6 days prior.
- ◆ Press the Down-arrow key to move the selection to the day 6 days later.
- ◆ Press the Home key to move the selection to the first day of the month.
- ◆ Press the End key to move the selection to the last day of the month.
- ◆ Press Ctrl+Page Up to move the selection to the closest day in the previous month.
- ◆ Press Ctrl+Page Down to move the selection to the closest day in the following month.
- ◆ Press Ctrl+Up-arrow to display the **Months** drop down for the selected year. The current month is initially selected on the **Months**, drop down.
- ◆ Press the Enter key to accept the selected date. The **Monthly Calendar** (Figure 8) drop down is dismissed and the edit box is populated with the day, month, and year selected.



Figure 8 - Monthly Calendar Drop Down

The following additional options are available using the keyboard:

- ◆ Press the Left-arrow key to move the selection to the previous month.
- ◆ Press the Right-arrow key to move the selection to the following month.
- ◆ Press the Home key to move the selection to the first month of the year.
- ◆ Press the End key to move the selection to the last month of the year.
- ◆ Press Ctrl+Page Up to move the selection to the same month in the previous year.
- ◆ Press Ctrl+Page Down to move the selection to the same month in the following year.
- ◆ Press Ctrl+Up-arrow to display the **Years** drop down (see **Error! Reference source not found.**) for the 10-year range that includes the selected year. The current year is initially selected on the **Years**, drop down.
- ◆ Press the Enter key to accept the selected month. The **Months** drop down is dismissed and the selected month displays on the **Monthly Calendar** drop down.



**Figure 9 - Year Calendar Drop Down**

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