

## New Employee Training Checklist

New employees hired by local WIC agencies must learn many tasks before they can work independently. This form provides a standard training checklist to facilitate consistent training.

There is a New Employee Training (NET) Checklist for each staff type (CPA\*, Support Staff, Scheduler Only and Breastfeeding Peer Counselor) on the following pages. The checklist identifies core tasks and policies that need to be explained, and whenever possible, demonstrated to new staff by experienced staff or trainers.

Staff Type	NET Checklist found on page:
<a href="#">CPA</a>	2
<a href="#">Support Staff</a>	18
<a href="#">Scheduler Only</a>	28
<a href="#">Breastfeeding Peer Counselor</a>	35

\*A new WIC Coordinator is expected to complete the CPA New Employee Training checklist

The WIC Coordinator should periodically review the checklist with the trainer(s) assisting with the on-the-job training and the new employee until it is completed. The checklist should be completed within 60 days.

When a task or policy has been discussed and (whenever possible) observed, the trainer and new employee should initial the appropriate column(s).

### Completing the Checklist

The table below provides general guidelines for completing the checklist.

Step	Action
1	Go to and complete the first page of the checklist according to staff role (See table above for the page number)
2	Prioritize the training tasks to address first based on clinic schedules, primary task assignments and other factors
3	The new employee and trainer shall initial each task as it is discussed and/or observed
5	File the checklist and assure documentation of completion in the staff training record within the data system

## CPA\* New Employee Training Checklist

**Name:**

**Start Date:**

**Trainer(s) Name(s):**

**Overview**

The following tasks are to be completed before the new staff person completes the Level 1 modules of WIC New Employee Training. See the Local Agency Personnel Training policy and the New Employee Training Record form for more information.

Step	Activity	Date Completed
1	WIC Coordinator requests data system access from the state WIC office (See the Local WIC Agency Data Processing policy for the procedure on this)	
2	Complete local agency orientation	
3	Observe one family’s certification appointment from start to finish	
4	Observe and work alongside a co-worker (of same role) for one clinic	

**Note:** Local agency staff must complete training in the data system before they are given security rights.

\*A new WIC Coordinator is expected to complete the CPA New Employee Training checklist.

**Reminder:** Throughout new employee training, record all training completion dates on the New Employee Training Record and in the staff training record within the data system.

**Policy, Procedures and Communication with the State**

Topics	Discussed	Observed
Policy and Procedure Manuals: <ul style="list-style-type: none"> <li>● Where are they located</li> <li>● Basic structure of policies (Policy, Authority, Procedure, Best Practices)</li> <li>● Procedures</li> <li>● Forms</li> </ul>		
Protocol for contacting the state WIC office: <ul style="list-style-type: none"> <li>● What is your local agency policy?</li> <li>● State office phone number: (800) 532-1579</li> <li>● Local agency consultants</li> <li>● Consultant type questions</li> <li>● WIC Help Desk                             <ul style="list-style-type: none"> <li>○ (800) 532-1579 press 2</li> <li>○ <a href="mailto:wichd@hhs.iowa.gov">wichd@hhs.iowa.gov</a> is monitored M-F 8:00am – 4:30pm</li> <li>○ Help desk type issues/questions</li> </ul> </li> </ul>		

**The Clinic Environment**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>● Confidentiality of Participant Information</li> <li>● Clinic Environment</li> <li>● USDA Nondiscrimination Statement</li> <li>● Complaints</li> <li>● Breastfeeding Promotion and Support</li> </ul> Also read: <ul style="list-style-type: none"> <li>● Breastfeeding Promotion and Support Cheat Sheet</li> </ul>		
Confidentiality within the clinic and other settings where participant interactions are occurring: <ul style="list-style-type: none"> <li>● Set-up</li> </ul>		

<ul style="list-style-type: none"> <li>• Position of computer screens</li> <li>• Set up of work area for clinic</li> <li>• Conversations and phone calls</li> <li>• Participant information</li> </ul>		
USDA Nondiscrimination statement		
And Justice for All poster		
Civil Rights folder		
Clinic ID signs on outside door		
No Smoking sign		
Clinic Flow		
Promotes and supports breastfeeding		
Customer service expectations		
WIC Brand & Style Guide		
WIC Strategic Plan		

**Data System Set Up**

Topics	Discussed	Observed
Set up of computers & printer/scanner		
Security access within the system depends on staff role		
Two-factor authentication and passwords		
Physical security of computers, printer/scanner		
Computer and printer/scanner care and maintenance		
E-signatures in the data system		

**Data System Fundamentals**

Topics	Discussed	Observed
Navigating the data system and File menu		
Simple search vs. Advance search with wildcard (%)		
Navigation features (e.g., tabs, radio buttons, check boxes, drop down lists, record selector, calendar dates, new vs. edit, copy, cut, paste, etc.)		
Comments/Alerts panel		
Required fields		
Best practices and non-required fields		
Family ID and Participant ID and Economic Unit number		

Record dates		
--------------	--	--

**Appointments**

<b>Topics</b>	<b>Discussed</b>	<b>Observed</b>
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Processing Standards and Notice of Eligibility</li> <li>• Participant Categories and Certification Periods</li> <li>• Missed Appointment Follow-up</li> <li>• Missed Appointments and Food Instruments</li> </ul>		
Scheduling appointments <ul style="list-style-type: none"> <li>• What participants need to bring with them</li> <li>• Appointment notices</li> <li>• Special arrangements needed</li> </ul>		
10/20 day scheduling requirements		
Length of certification periods <ul style="list-style-type: none"> <li>• Participant type and length of certifications</li> <li>• When to recertify</li> <li>• Modifying a cert end date</li> </ul>		
TeleWIC <ul style="list-style-type: none"> <li>• When to utilize</li> <li>• Anthropometric/Bloodwork measurements</li> <li>• Collecting proofs</li> <li>• Use of Health Information Exchange (HIE)</li> </ul>		
Follow-up on participants who miss their WIC appointment <ul style="list-style-type: none"> <li>• What is your local agency policy for pregnant women?</li> <li>• For all other participants?</li> </ul> Late arrivals and walk-ins <ul style="list-style-type: none"> <li>• What is your local agency policy?</li> </ul>		
Clinic closings <ul style="list-style-type: none"> <li>• What is your local agency policy?</li> </ul>		
Scheduling return appointments (When? How? For what?) <ul style="list-style-type: none"> <li>• Follow ups</li> <li>• Health Updates</li> </ul>		

<ul style="list-style-type: none"> <li>• Nutrition</li> <li>• Certs/Re-certs</li> </ul>		
---	--	--

**Data System Scheduler**

Topics	Discussed	Observed
Selecting the right clinic		
Creating appointments <ul style="list-style-type: none"> <li>• Certification</li> <li>• Nutrition education</li> <li>• Nutrition class</li> <li>• Health update</li> <li>• TeleWIC</li> <li>• Non-WIC appointment</li> </ul>		
Schedule, reschedule, cancel, move appointments		
Refresh appointments		
Recent family		
Print an appointment notice		
Copy appointments		
Marking status of appointments		

**Intake and the Data System Family Panel**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Collecting Race and Ethnicity Data</li> <li>• Verification of Certification</li> <li>• Foster Care Procedure</li> <li>• Split Custody Procedure</li> <li>• Proxies</li> </ul> Also read: <ul style="list-style-type: none"> <li>• Intake Cheat Sheet</li> </ul>		
New family members <ul style="list-style-type: none"> <li>• New Member/Proxy hyperlink</li> <li>• Enrollment information/dual enrollment</li> </ul> Participant, parent/guardian, proxy definitions and organization of names in data system <ul style="list-style-type: none"> <li>• Primary parent/guardian</li> <li>• Additional parent/guardian</li> <li>• Inactive parent/guardian</li> </ul>		

<ul style="list-style-type: none"> <li>● Active participant</li> <li>● Non-active participant</li> <li>● Proxies</li> <li>● Inactive proxies</li> </ul>		
Proxy form/notes <ul style="list-style-type: none"> <li>● Documenting in data system</li> <li>● Scanning</li> <li>● Regularly reviewing</li> </ul>		
Alias hyperlink		
VOC (transfer family to and from other states) <ul style="list-style-type: none"> <li>● Responding to requests for participant information when a participant moves to another state</li> <li>● Incoming out-of-state transfers</li> <li>● Providing VOC information to participants planning to move</li> </ul>		
Incoming in-state transfers, retrieving participants, transferring families		
Adding a foster child		
Food Benefit issuance		
Notations on screen: FM, Foster, HR, VOC, Prov, BP, IN, SN, BW, MC		
Referred to WIC by <ul style="list-style-type: none"> <li>● When to update</li> </ul>		
Mother's education level		
Output language <ul style="list-style-type: none"> <li>● Is an Interpreter needed?</li> </ul>		
Preferred Spoken Language		

**Intake and the Data System Identity Panel**

<b>Topics</b>	<b>Discussed</b>	<b>Observed</b>
Policies to read and discuss include: <ul style="list-style-type: none"> <li>● Identification Requirements</li> <li>● Physical Presence Requirements</li> </ul>		
Proof of identity <ul style="list-style-type: none"> <li>● Acceptable forms of identity</li> <li>● Exceptions to policy</li> </ul>		
Physically seen at certification		
Other Program Participation		

**Intake and the Data System Contact/Address Panel**

<b>Topics</b>	<b>Discussed</b>	<b>Observed</b>
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Residency Requirements</li> </ul>		
Acceptable forms of proof		
Mailing vs physical address		
Address (not legal status)		
Exceptions to policy		
Definition of homeless		
Definition of migrant status		
Definition of refugee status		
Follow-up requirements		
Does the local agency collect/use email addresses?		
Privacy information for mail, texts, emails, and calls		
Serving applicants who live in another service area		

**Intake and the Data System Income Panel**

<b>Topics</b>	<b>Discussed</b>	<b>Observed</b>
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Household Size</li> <li>• Adjunctive Eligibility</li> <li>• Income Determination</li> <li>• Income Guidelines</li> <li>• Mandatory and Optional Mid-Certification Actions</li> </ul>		
Household or family size <ul style="list-style-type: none"> <li>• Definition of a household</li> <li>• Pregnant women and household size</li> <li>• Reported changes in household members</li> </ul>		
Adjunctive eligibility <ul style="list-style-type: none"> <li>• What it is</li> <li>• Acceptable forms of proof</li> <li>• Follow-up requirements</li> <li>• Reported changes in program participation</li> </ul>		
Proof of income <ul style="list-style-type: none"> <li>• What is counted and what is not</li> <li>• Acceptable forms of proof</li> <li>• Exceptions to policy</li> </ul>		

<ul style="list-style-type: none"> <li>• How to handle reports of zero income</li> <li>• Current income guidelines</li> <li>• Reported changes of income</li> <li>• Income family and foster children</li> <li>• Follow-up requirements</li> </ul>		
--	--	--

**Intake and the Data System Voter Registration Panel/Other**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Voter Registration</li> <li>• Participant Violations and Sanctions</li> </ul>		
Voter Registration <ul style="list-style-type: none"> <li>• When are we required to ask?</li> <li>• Filing forms/retention requirements</li> </ul>		
Participant violations overview		
Affidavit reasons		
Printing and use of a signed Statement/Affidavit for Identity, Address and Income		
Scanning documents		

**Assessment and the Data System Pregnancy Panel**

Topics	Discussed	Observed
Pregnancy and postpartum data <ul style="list-style-type: none"> <li>• Autofill EDD or LMP</li> <li>• Link to infant</li> <li>• Use of Health Information Exchange (HIE)</li> </ul>		

**Assessment and the Data System Breastfeeding and Breastfeeding Equipment Panel**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Breastfeeding Data Collection</li> <li>• Issuing Breastfeeding Equipment</li> </ul>		
Breastfeeding <ul style="list-style-type: none"> <li>• Feeding history of the infant</li> <li>• Link to mother</li> </ul>		
Issuing breast pumps and other equipment		
Breastfeeding teaching resources		

Keeping breast pumps and breastfeeding equipment secure		
---	--	--

**Assessment and the Data System Breastfeeding Peer Counseling Documentation Panel**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>WIC Breastfeeding Peer Counseling Programs in Iowa</li> <li>Staff Referrals to Peer Counselors</li> <li>Breastfeeding Peer Counselors – Scope of Practice and When to Yield</li> </ul> Also read: <ul style="list-style-type: none"> <li>BFPC Cheat Sheet</li> </ul>		
Referring to the BFPC Program		
BFPC Documentation screen in Focus		

**Assessment and the Data System Anthropometric Panel**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>Anthropometric Measurements</li> </ul> Also read: <ul style="list-style-type: none"> <li>Taking Anthropometric Measurements Cheat Sheet</li> </ul>		
<ul style="list-style-type: none"> <li>Referral data</li> <li>Birth measurements for children less than 2 years of age</li> <li>Chart list (printing a growth chart)</li> <li>Growth charts age-adjusted for prematurity</li> <li>Weeks gestation</li> <li>Inaccurate reasons</li> <li>Use of Health Information Exchange (HIE)</li> </ul>		
Using referral data for height and weight		
Weight measurements		
Recumbent length measurements		
Standing height measurements		
Growth charts		
Explaining pediatric growth charts		
Explaining a pregnancy weight gain chart		
Health and nutrition history cards		

**Assessment and the Data System Blood Panel**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>● Blood Tests policy</li> <li>● Measuring Hemoglobin with Hemocue Procedure</li> <li>● Measuring Hemoglobin with Pronto Procedure</li> <li>● Blood Lead Screening</li> <li>● Infection Control Guidelines</li> </ul> Also read: <ul style="list-style-type: none"> <li>● Taking Blood Measurements Cheat Sheet</li> </ul>		
<ul style="list-style-type: none"> <li>● Referral data</li> <li>● Trend graph</li> <li>● Deferred results</li> <li>● Normal results</li> <li>● Lead level measurement</li> <li>● Use of Health Information Exchange (HIE)</li> </ul>		
Puncture resistant container for lancets		
Gloves		
Regular hand washing		
Use of non-invasive pulse co-oximeter		
Blood drawing technique for hemoglobin		
Close cuvette container after each use		
Explain results of blood test		
Blood testing schedule		
Using referral data		
History of lead screening for all participant categories <ul style="list-style-type: none"> <li>● Referrals for infants and children screened</li> </ul>		

**Assessment and the Data System Nutrition Interview Panel**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>● Nutrition and Health Assessment</li> <li>● Substance Abuse Screening and Referral</li> <li>● Nutrition Care Plans</li> <li>● Immunizations</li> </ul> Also read:		

<ul style="list-style-type: none"> <li>● Assessment and Counseling Cheat Sheet</li> </ul>		
Nutrition Interview <ul style="list-style-type: none"> <li>● Participant centered</li> <li>● Use of the starters/prompts</li> </ul>		
Infant nutrition interview (Breastfeeding, Not Breastfeeding)		
Child’s nutrition interview		
Women’s nutrition interview (Pregnant, Breastfeeding, Not Breastfeeding)		
Substance use and abuse <ul style="list-style-type: none"> <li>● Written information to all pregnant and breastfeeding women</li> <li>● List of available treatment centers and programs</li> </ul>		
Immunization status of infants and children <ul style="list-style-type: none"> <li>● Use of Health Information Exchange (HIE)</li> </ul>		

**Assessment and the Data System Risk Panel**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>● Nutrition Risk Requirements</li> <li>● Nutrition Risk Priorities</li> <li>● Nutrition Risk Definitions</li> </ul> Also read: <ul style="list-style-type: none"> <li>● Nutrition Risk Cheat Sheet</li> <li>● Nutrition Risks for Consideration Tool</li> </ul>		
Risk <ul style="list-style-type: none"> <li>● Auto-assigned nutrition risks</li> <li>● Manually assign nutrition risks</li> <li>● Manually assigning someone as high risk</li> </ul>		
Nutrition risks <ul style="list-style-type: none"> <li>● Anthropometric risks</li> <li>● Biochemical risks</li> <li>● Medical risks</li> <li>● Dietary risks</li> <li>● Other risks</li> <li>● Auto-assigned vs. manual</li> <li>● High risk conditions</li> </ul>		

**Education and Care and the Data System Nutrition Education and Care Plan Panels**

<b>Topics</b>	<b>Discussed</b>	<b>Observed</b>
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Nutrition Education Contacts</li> <li>• Nutrition Education Materials</li> <li>• New Participant Education</li> </ul>		
New participant education requirements		
Initial contacts at certification		
High-risk subsequent nutrition contacts		
Low-risk subsequent nutrition contacts		
Scheduling subsequent nutrition contacts		
Documenting subsequent nutrition contacts		
Copying completed nutrition education topics for family members		
Print materials (nutrition education, breastfeeding, outreach, and program forms) and where to find		
Wichealth.org <ul style="list-style-type: none"> <li>• Lessons</li> <li>• Resource library for electronic handouts</li> <li>• Health eKitchen</li> </ul>		
Care Plan <ul style="list-style-type: none"> <li>• High risk participants require complete SOAP note</li> <li>• Printing a care plan</li> </ul>		

**Education and Care and the Data System Referrals Panel and Referrals Process**

<b>Topics</b>	<b>Discussed</b>	<b>Observed</b>
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Release and Requests of Information</li> <li>• Authorization for Release of Information Form</li> <li>• Referrals</li> <li>• Referrals to Medicaid and Hawki</li> <li>• Referrals to Programs and Agencies</li> <li>• Referral from WIC form</li> </ul>		
Referrals are part of the nutrition services WIC provides		
Referral agencies <ul style="list-style-type: none"> <li>• Medicaid/Hawki</li> </ul>		

<ul style="list-style-type: none"> <li>• Maternal Health</li> <li>• Child Health</li> <li>• Family Planning</li> <li>• Public Health</li> <li>• Early Access</li> <li>• Immunizations</li> <li>• EFNEP and FNP</li> <li>• Head Start/Early Head Start</li> <li>• Oral Health</li> <li>• Tobacco cessation</li> <li>• Other local community resources (local agency specific)</li> </ul>		
Water testing for bacteria and nitrates		
Fluoride status of household water supply		
Follow-up on referrals (local agency specific policy and procedures)		
Participant vs. Family Referrals		
Sharing of WIC data		

**Final Eligibility Determination/Certification Panel**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Rights and Responsibilities</li> <li>• Terminations</li> <li>• WIC Service Delivery</li> </ul>		
Certification end date		
Modifying Certification End Dates		
Categorical eligibility end date		
Troubleshooting unsuccessful certification		
Termination		
Reinstate		
Applicant Rights and Responsibilities		
Collecting Signatures		
Notice of Termination		
Print Notice of Ineligibility		

**Food Instruments**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Issuing Food Instruments</li> <li>• Lost or Stolen Food Instruments</li> <li>• Medical Documentation</li> </ul>		

Division of responsibilities among staff members		
Issuing a PAN/eWIC card (Card Operations Panel)		
Economic Unit <ul style="list-style-type: none"> <li>Foster children have their own</li> </ul>		
Participant PIN selection		
Describe how to use eWIC card <i>(Participant brochure)</i>		
Approved vendors in the service area (local agency list)		
Deactivating eWIC cards		
Issuing benefits to the eWIC card		
Capturing a signature using the Signature Pad		
Calendar Month		
Reissuing benefits as a result of a food package change		
Audit Trail Panel		
Mailing food instruments		
Missed FI pick-up policy (L/A policy)		
Lost/stolen food instruments		
Supply and security of WIC FIs		
Use of the Participant Customer Service IVR or web portal		

**Food Package**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>All Food Package policies (Infant, Children 1-4 Years, Pregnant or Partially (Mostly) Breastfeeding, Fully Breastfeeding Women, Postpartum or Mostly Formula Feeding Women, Special Children and Women)</li> <li>Food Package Nutrition Tailoring</li> <li>Food Package Administration Adjustments</li> </ul> Also read: <ul style="list-style-type: none"> <li>Food Package Cheat Sheet</li> </ul>		
Food Package <ul style="list-style-type: none"> <li>Model food packages</li> </ul>		

<ul style="list-style-type: none"> <li>• Categories/Subcategories</li> <li>• Add/remove food</li> <li>• Tailor food packages</li> <li>• Special formula documentation</li> </ul>		
Approved foods for each participant category		
Maximum amount of formula		
Providing formula to breastfed infants		
Substitutions in food items		
Special offers: coupons with WIC benefits, extra ounces; buy 1, get 1 free		
WIC Shopper App		

**Formulas**

<b>Topics</b>	<b>Discussed</b>	<b>Observed</b>
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Special Formula Warehouse Procedure</li> <li>• Infant Formula Returns</li> <li>• Medicaid Reimbursement for Enteral Nutrition</li> <li>• Local Agency Formula Warehouse Process Procedure</li> </ul>		
Current contract infant formulas		
Exceptions for non-contract infant formulas		
Approved special formulas		
Formula warehouse process		
Locating a special purpose vendor		
Documentation for Medicaid regarding special formulas		
Returned formula (and Returned Formula panel)		
Keep returned formula secure and out of view of participants		

**Other Issues**

<b>Topics</b>	<b>Discussed</b>	<b>Observed</b>
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Local Agency Data Processing</li> <li>• Reporting WIC Personnel Costs</li> </ul>		

Farmers' Market Nutrition Program		
Time studies for nutrition education reporting		

***Reminder: Return completed checklist to your WIC Coordinator for filing and document completion in the Staff Training panel of the WIC data system.***

## Support Staff New Employee Training Checklist

**Name:**

**Start Date:**

**Trainer(s) Name(s):**

**Overview**

The following tasks are to be completed before the new staff person completes the Level 1 modules of WIC New Employee Training. See the Local Agency Personnel Training policy and the New Employee Training Record form for more information.

Step	Activity	Date Completed
1	WIC Coordinator requests data system access from the state WIC office (See the Local WIC Agency Data Processing policy for the procedure on this)	
2	Complete local agency orientation	
3	Observe one family’s certification appointment from start to finish	
4	Observe and work alongside a co-worker (of same role) for one clinic	

**Note:** Local agency staff must complete training in the data system before they are given security rights.

**Reminder:** Throughout new employee training, record all training completion dates on the New Employee Training Record and in the staff training record within the data system.

**Policy, Procedures and Communication with the State**

Topics	Discussed	Observed
Policy and Procedure Manuals: <ul style="list-style-type: none"> <li>● Where are they located</li> <li>● Basic structure of policies (Policy, Authority, Procedure, Best Practices)</li> <li>● Procedures</li> <li>● Forms</li> </ul>		
Protocol for contacting the state WIC office: <ul style="list-style-type: none"> <li>● What is your local agency policy?</li> <li>● State office phone number: (800) 532-1579</li> <li>● Local agency consultants</li> <li>● Consultant type questions</li> </ul> WIC Help Desk (800) 532-1579 press 2 <a href="mailto:wichd@hhs.iowa.gov">wichd@hhs.iowa.gov</a> is monitored M-F 8:00am – 4:30pm Help desk type issues/questions		

**The Clinic Environment**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>● Confidentiality of Participant Information</li> <li>● Clinic Environment</li> <li>● USDA Nondiscrimination</li> <li>● Complaints</li> <li>● Breastfeeding Promotion and Support</li> </ul>		
Confidentiality within the clinic and other settings where participant interactions are occurring: <ul style="list-style-type: none"> <li>● Set-up</li> <li>● Position of computer screens</li> <li>● Set up of work area for clinic</li> <li>● Conversations and phone calls</li> <li>● Participant information</li> </ul>		

USDA Nondiscrimination statement		
And Justice for All poster		
Civil Rights folder		
Clinic ID signs on outside door		
No Smoking sign		
Clinic Flow		
Promotes and supports breastfeeding		
Customer service expectations		
WIC Brand & Style Guide		
WIC Strategic Plan		

**Data System Set Up**

Topics	Discussed	Observed
Set up of computers & printer/scanner		
Set up of eWIC card readers and signature pads		
Security access within the system depends on staff role		
Two-factor authentication and passwords		
Physical security of computers, printer/scanner		
Computer and printer/scanner care and maintenance		
E-signatures in the data system		

**Data System Fundamentals**

Topics	Discussed	Observed
Navigating the data system and File menu		
Simple search vs. Advance search with wildcard (%)		
Navigation features (e.g., tabs, radio buttons, check boxes, drop down lists, record selector, calendar dates, new vs. edit, copy, cut, paste, etc.)		
Comments/Alerts panel		
Required fields		
Best practices and non-required fields		
Family ID and Participant ID and Economic Unit Number		
Record dates		

**Appointments**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>● Processing Standards and Notice of Eligibility</li> <li>● Participant Categories and Certification Periods</li> <li>● Missed Appointment Follow-up</li> <li>● Missed Appointments and Food Instruments</li> </ul>		
Scheduling appointments <ul style="list-style-type: none"> <li>● What participants need to bring with them</li> <li>● Appointment notices</li> <li>● Special arrangements needed</li> </ul>		
10/20 day scheduling requirement		
Length of certification periods <ul style="list-style-type: none"> <li>● Participant type and length of certifications</li> <li>● When to recertify</li> <li>● Modifying a cert end date</li> </ul>		
TeleWIC <ul style="list-style-type: none"> <li>● When to utilize</li> <li>● Collecting proofs</li> </ul>		
Follow-up on participants who miss their WIC appointment <ul style="list-style-type: none"> <li>● What is your local agency policy for pregnant women?</li> <li>● For all other participants?</li> </ul> Late arrivals and walk-ins <ul style="list-style-type: none"> <li>● What is your local agency policy?</li> </ul>		
Clinic closings <ul style="list-style-type: none"> <li>● What is your local agency policy?</li> </ul>		
Scheduling return appointments (When? How? For what?) <ul style="list-style-type: none"> <li>● Follow ups</li> <li>● Health Updates</li> <li>● Nutrition</li> <li>● Certs/Re-certs</li> </ul>		

**Data System Scheduler**

Topics	Discussed	Observed
Selecting the right clinic		
Creating appointments <ul style="list-style-type: none"> <li>● Certification</li> <li>● Nutrition education</li> <li>● Nutrition class</li> <li>● Health update</li> <li>● TeleWIC</li> <li>● Non-WIC appointment</li> </ul>		
Schedule, reschedule, cancel, move appointments		
Refresh appointments		
Recent family		
Print an appointment notice		
Copy appointments		
Marking status of appointments		

**Intake and the Data System Family Panel**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>● Collecting Race and Ethnicity Data</li> <li>● Verification of Certification</li> <li>● Foster Care Procedure</li> <li>● Split Custody Procedure</li> <li>● Proxies</li> </ul> Also read: <ul style="list-style-type: none"> <li>● Intake Cheat Sheet</li> </ul>		
New family members <ul style="list-style-type: none"> <li>● New Member/Proxy hyperlink</li> <li>● Enrollment information/dual enrollment</li> </ul> Participant, parent/guardian, proxy definitions and organization of names in data system <ul style="list-style-type: none"> <li>● Primary parent/guardian</li> <li>● Additional parent/guardian</li> <li>● Inactive parent/guardian</li> <li>● Active participant</li> <li>● Non-active participant</li> <li>● Proxies</li> <li>● Inactive proxies</li> </ul>		

Proxy form/notes <ul style="list-style-type: none"> <li>• Documenting in data system</li> <li>• Scanning</li> <li>• Regularly reviewing</li> </ul>		
Alias hyperlink		
VOC (transfer family to and from other clinics) <ul style="list-style-type: none"> <li>• Responding to requests for participant information when a participant moves to another state</li> <li>• Incoming out-of-state transfers</li> <li>• Providing VOC information to participants planning to move</li> </ul>		
Incoming in-state transfers, retrieving participants, transferring families		
Adding a foster child		
Food Benefit issuance		
Notations on screen: FM, Foster, L, HR, VOC, Prov, BP, IN, SN, BW, MC		
Referred to WIC by <ul style="list-style-type: none"> <li>• When to update</li> </ul>		
Mother’s education level		
Output language <ul style="list-style-type: none"> <li>• Is an Interpreter needed?</li> </ul>		
Preferred Spoken Language		

**Intake and the Data System Identity Panel**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Identification Requirements</li> <li>• Physical Presence Requirements</li> </ul>		
Proof of identity <ul style="list-style-type: none"> <li>• Acceptable forms of identity</li> <li>• Exceptions to policy</li> </ul>		
Physically seen at certification		
Other Program Participation		

**Intake and the Data System Contact/Address Panel**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Residency Requirements</li> </ul>		

Acceptable forms of proof		
Mailing vs physical address		
Address (not legal status)		
Exceptions to policy		
Definition of homeless		
Definition of migrant status		
Definition of refugee status		
Follow-up requirements		
Does the local agency collect/use email addresses?		
Privacy information for mail, texts, emails, and calls		
Serving applicants who live in another service area		

**Intake and the Data System Income Panel**

<b>Topics</b>	<b>Discussed</b>	<b>Observed</b>
Policies to read and discuss include: <ul style="list-style-type: none"> <li>● Household Size</li> <li>● Adjunctive Eligibility</li> <li>● Income Determination</li> <li>● Income Guidelines</li> <li>● Mandatory and Optional Mid-Certification Actions</li> </ul>		
Household or family size <ul style="list-style-type: none"> <li>● Definition of a household</li> <li>● Pregnant women and household size</li> <li>● Reported changes in household members</li> </ul>		
Adjunctive eligibility <ul style="list-style-type: none"> <li>● What it is</li> <li>● Acceptable forms of proof</li> <li>● Follow-up requirements</li> <li>● Reported changes in program participation</li> </ul>		
Proof of income <ul style="list-style-type: none"> <li>● What is counted and what is not</li> <li>● Acceptable forms of proof</li> <li>● Exceptions to policy</li> <li>● How to handle reports of zero income</li> <li>● Current income guidelines</li> <li>● Reported changes of income</li> <li>● Income family and foster children</li> </ul>		

<ul style="list-style-type: none"> <li>• Follow-up requirements</li> </ul>		
--	--	--

**Intake and the Data System Voter Registration Panel/Other**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Voter Registration</li> <li>• Participant Violations and Sanctions</li> </ul>		
Voter Registration <ul style="list-style-type: none"> <li>• When are we required to ask?</li> <li>• Filing forms/retention requirements</li> </ul>		
Participant violations overview		
Affidavit reasons		
Printing and use of a signed Statement/Affidavit for Identity, Address and Income		
Scanning documents		

**Assessment and the Data System Breastfeeding Peer Counseling Documentation Panel**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• WIC Breastfeeding Peer Counseling Programs in Iowa</li> <li>• Staff Referrals to Peer Counselors</li> </ul>		

**Final Eligibility Determination/Certification Panel**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Rights and Responsibilities</li> <li>• Terminations</li> <li>• WIC Service Delivery</li> </ul>		
Certification end date		
Modify Certification End Dates		
Categorical eligibility end date		
Termination		
Reinstate		
Applicant Rights and Responsibilities		
Collecting Signatures		
Notice of Termination		
Print Notice of Ineligibility		

**Food Instruments**

<b>Topics</b>	<b>Discussed</b>	<b>Observed</b>
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Issuing Food Instruments</li> <li>• Lost or Stolen Food Instruments</li> <li>• Medical Documentation</li> </ul>		
Division of responsibilities among staff members		
Issuing a PAN/eWIC card (Card Operations Panel)		
Economic Unit <ul style="list-style-type: none"> <li>• Foster children have their own</li> </ul>		
Participant PIN selection		
Describe how to use eWIC card ( <i>Participant brochure</i> )		
Approved vendors in the service area (local agency list)		
Deactivating eWIC cards		
Issuing benefits to the eWIC card		
Capturing a signature using the Signature Pad		
Calendar Month		
Reissuing benefits as a result of a food package change		
Audit Trail		
Mailing food instruments		
Missed FI pick-up policy (L/A policy)		
Lost/stolen food instruments		
Supply and security of WIC FIs		
Use of the Participant Customer Service IVR or web portal		

**Food Package**

<b>Topics</b>	<b>Discussed</b>	<b>Observed</b>
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• All Food Package policies (Infant, Children 1-4 Years, Pregnant or Partially (Mostly) Breastfeeding, Fully Breastfeeding Women, Postpartum or Mostly Formula Feeding Women, Special Children and Women)</li> </ul>		
Food Package		

<ul style="list-style-type: none"> <li>• Model food packages</li> <li>• Categories/Subcategories</li> <li>• Special formula documentation</li> </ul>		
Approved foods for each participant category		
Maximum amount of formula		
Substitutions in food items		
Special offers: coupons with WIC benefits, extra ounces; buy 1, get 1 free		
WIC Shopper App		

**Formulas**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Infant Formula Returns</li> </ul>		
Current contract infant formulas		
Exceptions for non-contract infant formulas		
Locating a special purpose vendor		
Returned formula (and Returned Formula Panel)		
Keep returned formula secure and out of view of participants		

**Other Issues**

Topics	Discussed	Observed
Farmers' Market Nutrition Program		
Sharing of WIC data		

***Reminder: Return completed checklist to your WIC Coordinator for filing and document completion in the Staff Training panel of the WIC data system.***

## Scheduler Only New Employee Training Checklist

**Name:**

**Start Date:**

**Trainer(s) Name(s):**

**Overview**

The following tasks are to be completed before the new staff person completes the Level 1 modules of WIC New Employee Training. See the Local Agency Personnel Training policy and the New Employee Training Record form for more information.

Step	Activity	Date Completed
1	WIC Coordinator requests data system access from the state WIC office (See the Local WIC Agency Data Processing policy for the procedure on this)	
2	Complete local agency orientation	
3	Observe one family’s certification appointment from start to finish	
4	Observe and work alongside a co-worker (of same role) for one clinic (If the agency has no other Scheduler Only staff, work alongside a support staff for one clinic.)	

**Note:** Local agency staff must complete training in the data system before they are given security rights.

**Reminder:** Throughout new employee training, record all training completion dates on the New Employee Training Record and in the staff training record within the data system.

**Policy, Procedures and Communication with the State**

Topics	Discussed	Observed
Policy and Procedure Manuals: <ul style="list-style-type: none"> <li>● Where are they located</li> <li>● Basic structure of policies (Policy, Authority, Procedure, Best Practices)</li> </ul>		
Protocol for contacting the state WIC office: <ul style="list-style-type: none"> <li>● What is your local agency policy?</li> <li>● State office phone number: (800) 532-1579</li> <li>● Local agency consultants</li> <li>● Consultant type questions</li> <li>● WIC Help Desk                             <ul style="list-style-type: none"> <li>○ (800) 532-1579 press 2</li> <li>○ <a href="mailto:wichd@hhs.iowa.gov">wichd@hhs.iowa.gov</a> is monitored M-F 8:00am – 4:30pm</li> <li>○ Help desk type issues/questions</li> </ul> </li> </ul>		

**The Clinic Environment**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>● Confidentiality of Participant Information</li> <li>● USDA Nondiscrimination</li> <li>● Complaints</li> <li>● Breastfeeding Promotion and Support</li> </ul>		
Confidentiality and other settings where participant interactions are occurring: <ul style="list-style-type: none"> <li>● Set-up</li> <li>● Position of computer screens</li> <li>● Conversations and phone calls</li> <li>● Participant information</li> <li>● Sharing of WIC data</li> </ul>		
USDA Nondiscrimination statement		
Promotes and supports breastfeeding		
Customer service expectations		
WIC Brand & Style Guide		

WIC Strategic Plan		
--------------------	--	--

**Data System Set Up**

Topics	Discussed	Observed
Set up of computers & printer/scanner		
Security access within the system depends on staff role		
Two-factor authentication and passwords		
Physical security of computers, printer/scanner		
Computer and printer/scanner care and maintenance		
E-signatures in the data system		

**Data System Fundamentals**

Topics	Discussed	Observed
Navigating the data system and File menu		
Simple search vs. Advance search with wildcard (%)		
Navigation features (e.g., tabs, radio buttons, check boxes, drop down lists, record selector, calendar dates, new vs. edit, copy, cut, paste, etc.)		
Comments/Alerts panel		
Required fields		
Best practices and non-required fields		
Family ID and participant ID and Economic Unit Number		
Record dates		

**Appointments**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>● Processing Standards and Notice of Eligibility</li> <li>● Participant Categories and Certification Periods</li> <li>● Missed Appointment Follow-up</li> </ul>		
Scheduling appointments <ul style="list-style-type: none"> <li>● What participants need to bring with them</li> </ul>		

<ul style="list-style-type: none"> <li>• Appointment notices</li> <li>• Special arrangements needed</li> </ul>		
10/20 day scheduling requirement		
Length of certification periods <ul style="list-style-type: none"> <li>• Participant type and length of certifications</li> <li>• When to recertify</li> <li>• Modifying a cert end date</li> </ul>		
TeleWIC		
Clinic Closings <ul style="list-style-type: none"> <li>• What is your local agency policy?</li> </ul>		
Scheduling return appointments (When? How? For what?) <ul style="list-style-type: none"> <li>• Follow ups</li> <li>• Health Updates</li> <li>• Nutrition</li> <li>• Certs/Re-certs</li> </ul>		

**Data System Scheduler**

Topics	Discussed	Observed
Selecting the right clinic		
Creating appointments <ul style="list-style-type: none"> <li>• Certification</li> <li>• Nutrition education</li> <li>• Nutrition class</li> <li>• Health update</li> <li>• TeleWIC</li> <li>• Non-WIC appointment</li> </ul>		
Schedule, reschedule, cancel, move appointments		
Refresh appointments		
Recent family		
Print an appointment notice		
Copy appointments		
Marking status of appointments		

**Intake and the Data System Family Panel**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Collecting Race and Ethnicity Data</li> </ul>		

<ul style="list-style-type: none"> <li>• Verification of Certification</li> <li>• Foster Care Procedure</li> <li>• Split Custody Procedure</li> <li>• Proxies</li> </ul>		
<p>New family members</p> <ul style="list-style-type: none"> <li>• New Member/Proxy hyperlink</li> <li>• Enrollment information/dual enrollment</li> </ul> <p>Participant, parent/guardian, proxy definitions and organization of names in data system</p> <ul style="list-style-type: none"> <li>• Primary parent/guardian</li> <li>• Additional parent/guardian</li> <li>• Inactive parent/guardian</li> <li>• Active participant</li> <li>• Non-active participant</li> <li>• Proxies</li> <li>• Inactive proxies</li> </ul>		
Alias hyperlink		
<p>VOC (transfer family to and from other clinics)</p> <ul style="list-style-type: none"> <li>• Responding to requests for participant information when a participant moves to another state</li> <li>• Incoming out-of-state transfers</li> <li>• Providing VOC information to participants planning to move</li> </ul>		
Incoming in-state transfers, retrieving participants, transferring families		
Adding a foster child		
Food Benefit issuance		
Notations on screen: FM, Foster, L, HR, VOC, Prov, BP, IN, SN, BW, MC		
<p>Referred to WIC by</p> <ul style="list-style-type: none"> <li>• When to update</li> </ul>		
Mother's education level		
<p>Output language</p> <ul style="list-style-type: none"> <li>• Is an Interpreter needed?</li> </ul>		
Preferred Spoken Language		

**Intake and the Data System Identity Panel**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Identification Requirements</li> <li>• Physical Presence Requirements</li> </ul>		
Proof of identity <ul style="list-style-type: none"> <li>• Acceptable forms of identity</li> <li>• Exceptions to policy</li> </ul>		

**Intake and the Data System Contact/Address Panel**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Residency Requirements</li> </ul>		
Acceptable forms of proof		
Mailing vs physical address		
Address (not legal status)		
Exceptions to policy		
Definition of homeless		
Definition of migrant status		
Definition of refugee status		
Follow-up requirements		
Does the local agency collect/use email addresses?		
Privacy information for mail, texts, emails, and calls		
Serving applicants who live in another service area		

**Intake and the Data System Income Panel**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>• Household Size</li> <li>• Adjunctive Eligibility</li> <li>• Income Determination</li> <li>• Income Guidelines</li> <li>• Mandatory and Optional Mid-Certification Actions</li> </ul>		
Household or family size <ul style="list-style-type: none"> <li>• Definition of a household</li> <li>• Pregnant women and household size</li> </ul>		

<ul style="list-style-type: none"> <li>● Reported changes in household members</li> </ul>		
<b>Adjunctive eligibility</b> <ul style="list-style-type: none"> <li>● What it is</li> <li>● Acceptable forms of proof</li> <li>● Follow-up requirements</li> <li>● Reported changes in program participation</li> </ul>		
<b>Proof of income</b> <ul style="list-style-type: none"> <li>● What is counted and what is not</li> <li>● Acceptable forms of proof</li> <li>● Exceptions to policy</li> <li>● How to handle reports of zero income</li> <li>● Current income guidelines</li> <li>● Reported changes of income</li> <li>● Income family and foster children</li> <li>● Follow-up requirements</li> </ul>		

**Breastfeeding Peer Counseling Program**

<b>Topics</b>	<b>Discussed</b>	<b>Observed</b>
Policies to read and discuss include: <ul style="list-style-type: none"> <li>● WIC Breastfeeding Peer Counseling Programs in Iowa</li> </ul>		

***Reminder: Return completed checklist to your WIC Coordinator for filing and document completion in the Staff Training panel of the WIC data system.***

## Breastfeeding Peer Counselor New Employee Training Checklist

**Name:**

**Start Date:**

**Trainer(s) Name(s):**

**Overview**

The following tasks are to be completed before the new staff person begins working with participants independently.

See the Local Agency Personnel Training policy, Peer Counselor Training policy and the New Employee Training Record form for more information.

Step	Activity	Date Completed
1	WIC Coordinator requests data system access from the state WIC office (See the Local WIC Agency Data Processing policy for the procedure on this)	
2	Complete local agency orientation	
3	Observe one family’s certification appointment from start to finish	
4	Observe and work alongside a co-worker (of same role) for one clinic. When an agency has only one BFPC, new BFPCs are encouraged to shadow an experienced BFPC at a nearby agency.	

**Note:** Local agency staff must complete training in the data system before they are given security rights.

**Reminder:** Throughout new employee training, record all training completion dates on the New Employee Training Record and in the staff training record within the data system.

**Policy, Procedures and Communication with the State**

Topics	Discussed	Observed
<p>Policy and Procedure Manuals:</p> <ul style="list-style-type: none"> <li>● Where are they located</li> <li>● Basic structure of policies (Policy, Authority, Procedure, Best Practices)</li> <li>● Procedures</li> <li>● Forms</li> </ul>		
<p>Protocol for contacting the state WIC office:</p> <ul style="list-style-type: none"> <li>● Local agency policy/When to contact the state office/WIC Helpdesk</li> <li>● State office phone number: (800) 532-1579</li> <li>● WIC Help Desk                             <ul style="list-style-type: none"> <li>○ (800) 532-1579 press 2</li> <li>○ <a href="mailto:wichd@hhs.iowa.gov">wichd@hhs.iowa.gov</a> is monitored M-F 8:00am – 4:30pm</li> <li>○ Help desk type issues/questions</li> </ul> </li> </ul>		

**The Clinic Environment**

Topics	Discussed	Observed
<p>Policies to read and discuss include:</p> <ul style="list-style-type: none"> <li>● Confidentiality of Participant Information</li> <li>● Clinic Environment</li> <li>● USDA Nondiscrimination Statement</li> <li>● Complaints</li> <li>● Breastfeeding Promotion and Support</li> </ul>		
<p>Confidentiality within the clinic and other settings where participant interactions are occurring:</p> <ul style="list-style-type: none"> <li>● Set-up</li> <li>● Position of computer screens</li> <li>● Set up of work area</li> <li>● Conversations and phone calls</li> </ul>		

<ul style="list-style-type: none"> <li>Participant information</li> </ul>		
USDA Nondiscrimination statement		
And Justice for All poster		
Civil Rights folder		
Clinic ID signs on outside door		
No Smoking sign		
Clinic Flow		
Promotes and supports breastfeeding		
Customer service expectations		
WIC Brand & Style Guide		
WIC Strategic Plan		

**Data System/Cell Phone Set Up/Security**

Topics	Discussed	Observed
Set up of computers & cell phone		
Security access within the system		
Two-factor authentication and passwords		
Physical security of computers and cell phones		
Computer and cell phone care and maintenance		

**Data System Fundamentals/Breastfeeding Peer Counseling Documentation in Focus**

Topics	Discussed	Observed
Breastfeeding Peer Counselor Navigation of Focus Tutorial		

**Breastfeeding Peer Counseling Program**

Topics	Discussed	Observed
Policies to read and discuss include: <ul style="list-style-type: none"> <li>WIC Breastfeeding Peer Counseling Programs in Iowa</li> <li>Breastfeeding Peer Counselor</li> <li>Peer Counselor Training</li> <li>Staff Referrals to Peer Counseling</li> <li>Minimum Client Contact Schedule for Breastfeeding Peer Counselors</li> <li>Breastfeeding Peer Counselors – Scope of Practice and When to Yield</li> </ul>		

<ul style="list-style-type: none"> <li>● BFPC Contact Observation Procedure</li> <li>● Peer Counselor Contact Observation Tool</li> <li>● Peer Counselor Documentation Review Procedure</li> <li>● Breastfeeding Peer Counseling Time Study Procedure</li> <li>● Breastfeeding Peer Counseling Time Study Report</li> </ul>		
Local agency BFPC referral process		
Local agency BFPC caseload management <ul style="list-style-type: none"> <li>● Timeline expectation for initial contact with new participants</li> <li>● Tracking caseload (Focus, tickler file, etc.)</li> </ul>		
Local agency BFPC Yield Process		
Local agency process for exiting participants from BFPC Program		
Local agency Peer Counselor activity reporting (if applicable)		
BFPC Meetings <ul style="list-style-type: none"> <li>● Local agency BFPC Meetings</li> <li>● Quarterly Statewide BFPC Meetings with State Breastfeeding Peer Counseling Coordinator</li> </ul>		

***Reminder: Return completed checklist to your WIC Coordinator for filing and document completion in the Staff Training panel of the WIC data system.***