

## Referrals to Programs and Agencies

### Policy

**USDA Federal Regulations:** (a) To lend administrative efficiency and participant convenience to the certification process, whenever possible, Program intake procedures shall be combined with intake procedures for other health programs or services administered by the State and local agencies. Such merging may include verification procedures, certification interviews, and income computations. Local agencies shall maintain and make available for distribution to all pregnant, postpartum, and breastfeeding women and to parents or caretakers of infants and children applying for and participating in the Program a list of local resources for drug and other harmful substance abuse counseling and treatment.

(b) Program referral and access. State and local agencies shall provide WIC Program applicants and participants or their designated proxies with information on other health-related and public assistance programs, and when appropriate, shall refer applicants and participants to such programs.

(1) If such individuals are not currently participating in Medicaid but appear to have family income below the applicable maximum income limits for the program, the local agency shall also refer these individuals to Medicaid, including the referral of infants and children to the appropriate entity in the area authorized to determine eligibility for early and periodic screening, diagnostic, and treatment (EPSDT) services, and, the referral of pregnant women to the appropriate entity in the area authorized to determine presumptive eligibility for the Medicaid Program, if such determinations are being offered by the State.

(e) Nutritional risk data shall be documented in the participant's file and shall be used to assess an applicant's nutritional status and risk; tailor the food package to address nutritional needs; design appropriate nutrition education, including breastfeeding promotion and support; and make referrals to health and social services for follow-up, as necessary and appropriate.

### Authority

7 CFR Part 246.7 (a)

7CFR Part 246.7 (b)(1)*excerpt*

7CFR Part246.7(e)*excerpt*

### Procedures

Agencies and programs that Iowa WIC staff will provide information and referrals as appropriate shall include but are not limited to:

- Maternal Health and Child and Adolescent Health Services (MCAH)

- I-Smile
- Family Planning Services
- Immunization Programs
- Local Public Health Services (LPH)
- Home Visitation
- Lead Testing
- First Five
- Water Testing
- Dentists and Health Care Providers
- Food Banks and Pantries
- Low-Income Home Energy Assistance (LIHEAP)
- Head Start/Early Head Start Programs
- Child Care Referral and Assistance
- Medicaid and Hawk-I
- SNAP

Refer any WIC applicant who:

- wants to apply for or who is not currently participating in Maternal Health or Child Health services when on-site enrollment is not available in the WIC clinic, and
- Women 19 years old who want to apply for Presumptive Medicaid Eligibility for Pregnant Women or Medicaid.

Referrals will be made in private, and the participant's acceptance of a suggested referral is voluntary. Referrals may be formal or informal.

- Formal referrals are for more urgent needs and are usually written and include a referral form with a release of information. An example can be found in the Certification, Eligibility and Coordination of Service forms folder and is called the Referral from the WIC Program form. A formal referral would also be when you call the organization or office on their behalf to enroll them or make an appointment on their behalf, whether or not they are still in the office with you when the call is made.
  - If the participant agrees to a formal referral, have the participant sign the release of information section on the referral form, and scan it into the participant's record before sending.
  - A referral form/release of information must be signed by the WIC participant to release any information, including the participant's name, to another agency, program, or individual. The exceptions to this are the named programs listed in the Confidentiality of Participant Information policy in which the director of the Iowa Department of Public Health has authorized the use and disclosure of limited WIC participant data, also detailed within that policy and Head Start and Early Head Start. This authorization is disclosed to participants in the document Your Rights and Responsibilities as a WIC Participant. A copy of this document can be found in the Certification, Eligibility and Coordination of Service forms folder.

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- If the referral is related to substance abuse, HIV status, or mental health, the participant must check the box identifying the specific information released and sign the Authorization for Release of Information of the form as well. An example of this form can be found in the Certification, Eligibility and Coordination of Service forms folder.
- Informal referrals are when the intent is to provide basic information about an agency or program. WIC personnel are encouraged to provide appropriate print materials such as program brochures when such materials are available.

Assurances must be in place that all referrals, both formal and informal, are documented in the participant's record by local agency staff.

WIC staff will follow up with the participant for all referrals documented in their record. The outcome of the follow up will be documented in the Follow-up drop down box on the Referrals-Participant or Referrals- Family panel.

- For referrals about immediate concerns, the referring staff member will call the participant within a few days to see if the referral was completed and needed services obtained.
- For referrals of a less urgent nature, the referring staff member can follow up with the participant by phone or the follow up can be done at their next scheduled appointment by the staff person seeing them.

See Confidentiality of Participant Information policy for what WIC information can be shared without an additional release of information.

## **Best Practices**

Encourage all participants to follow-through on the referral(s) you've given them as soon as possible.

### MCAH Services

If a participant expresses any health-related concerns such as not having a medical or dental home, social or health concerns, or difficulty paying for health services, WIC staff should convey the availability of health services provided by the local MCAH agency.

- Explain how MCAH services could be helpful in the areas for which there is a concern
- Ask the participant/caretaker if interested in receiving MCAH services.
  - If not, give the participant/caretaker the name, address and phone number of the MCAH agency for future reference.
  - If yes, proceed as applicable.
    - If MCAH services are available within the same agency as WIC and may or may not be available at the WIC clinic then refer the WIC participant to the MCH staff person and complete the agency's en-rollment form.
    - If MCAH services are not available within the same agency as WIC but are available at the WIC clinic then refer the WIC participant to the

appropriate MH or CAH staff person within the WIC clinic.

- If MCAH services are not available within the same agency as WIC and are not available at the WIC clinic then complete the Referral/Request for Information form, have the participant/caretaker sign the form and forward the referral to the MCAH agency.

### Oral Health Services

For an oral health assessment, education and referrals to a dental home for infants, children, and women, refer eligible participants to Child Health or Maternal Health.

- A dental hygienist, serving as I-Smile Oral Health Coordinator, is available in each child health agency to provide oral health assessments, education, preventive services, and care coordination for children.
- Medicaid, hawk-i, and Title V funds will pay for a dental visit for eligible children. Medicaid and hawk-i (up to the age of 19 years) will cover dental care for eligible pregnant women.
- I-Smile Coordinators can also provide training to non-dental health professionals about completing open mouth assessments.
- For more information on oral health see the USDA Infant Nutrition and Feeding A Guide for Use in the Special Supplemental Nutrition Program for Women, Infants and Children (WIC).

### Family Planning

Ask every postpartum participant what decision she has made about family planning, and whether she has discussed it with a physician or other health care provider. This would also be a good time to ask about a reproductive life plan and introduce preconception planning for the next pregnancy but be considerate of religious and cultural beliefs about family planning. Family planning services or contraceptives are available from:

- Primary care providers (including OB/GYN), and
- Family planning programs funded through the Iowa Department of Public Health and the Family Planning Council of Iowa (also referred to as Title X Family Planning Programs). Call the Healthy Families Line at 1-800-369-2229 to locate a clinic near a client. Alternatively, go to <https://idph.iowa.gov/family-health/family-planning>.

If the participant has not made any decisions about family planning, follow these steps.

- Is the participant interested in information about obtaining family planning services?
  - If not, discontinue the topic.
  - If yes, offer to make an appointment at a family planning agency while she is at the WIC clinic but do not identify her as a WIC participant.
    - Does she want you to make an appointment?
      - If yes, telephone the family planning agency to make an appointment and give her the appointment information she will need.
      - If not, or if you were unable to make the appointment at that time, give the participant the name, address and phone number of the

local family planning agency.

### Public Health Services

Public health services are available in every county. WIC agencies are strongly encouraged to develop collaborative partnerships with the public health agencies and Boards of Health in their service area to develop referral criteria. Drinking Water Testing

Drinking water contaminated with bacteria (total coliform and/or E.coli) or nitrate may pose a health risk, especially for infants. In order to reduce health risks, the Iowa Department of Public Health and Iowa Department of Natural Resources provides *Grants to Counties Water Well Program*, a drinking water-testing program through the State Hygienic Laboratory for Iowans with private wells.

To refer a participant for water testing you will need to contact the local county sanitarian. To locate the local sanitarian in your area go to:

<https://www.iowadnr.gov/Environmental-Protection/Water-Quality/Private-Well-Program>

- Prior to referring a participant to the county sanitarian for a water test, the local agency should confirm referral procedures with the county specialist. Then follow these steps.
  - Generate a referral form and have the participant sign it.
  - Call the county specialist with the referral to collect the sample and follow-up by mailing the printed referral.
  - Follow-up with the participant about the test results that they receive from the county specialist.
    - If water testing indicates that a well is contaminated with bacteria or nitrate, contact:
      - Environmental health professional for that county, or
      - Iowa Department of Natural Resources at (515)725-0462, or
      - Iowa Department of Public Health at 515-281-7726
    - Recommend an alternative water supply such as public water or bottled water.
  - Follow your agency's policy for any other needed follow-up.