# Key points document for Intake at Certification

*While this document is not meant to replace policies it is meant to summarize the key pieces during the intake process.

Some points will need to happen at every intake and some will be more specific to intake at the initial certification appointment.

- ✓ Introduce yourself and explain what is going to happen during the time you spend with the applicant.
- ✓ Verify spelling of all names entered or being entered in the data system.
- ✓ Verify date of birth for all participants in the data system.
- ✓ Applicants must be asked to identify their race and ethnicity, however they should be told providing this information is voluntary. Ethnicity, “Hispanic/Latino”, must be asked before Race.
- ✓ Fill out the Preferred Spoken Language and Printouts Language drop down boxes and check the Needs Interpreter checkbox (if applicable) on the bottom of the family panel.
- ✓ The Referred to WIC By field is required at the initial appointment only but it would be best practice to update it anytime the family hasn’t been on WIC for a long period of time (a year or more) to capture what or who reminded them about WIC. This can be helpful in evaluating outreach activities and partnerships.
- ✓ Ask about adding an additional parent/guardian and/or proxies. The additional parent/guardian does not need a proxy card filled out for them to do appointments. A proxy can be designated for one appointment or ongoing. The proxy card needs to be scanned into the participant record. Proxies should be reviewed at each certification appointment and inactivated as needed.
- ✓ Other Program Participation on the Identity panel is not required but asking about and checking the boxes of the programs the family uses has several benefits:
    - This can help give you a picture of the family’s situation.
    - Helps to set you up for asking about proofs of adjunctive eligibility if they answer they participate in any of those programs that confer eligibility.
    - The CPA can refer to this list to get a picture of what resources the family already uses and what referrals might still be helpful.
- ✓ The Contact/Address panel should be reviewed and updated at every contact by asking the participant to tell you the best address and phone number to reach them.
    - If you determine they are homeless, migrant or a refugee check the appropriate box in the physical address section.
- ✓ Household Size – Ask who lives in the household. Pregnant women must be given the option of whether or not to count their unborn baby in the household size prior to delivery.
    - To establish if there is more than one economic unit living under one roof, ask questions to determine if there is economic independence or not. See the Household Size policy’s procedure section for questions to ask.
    - In cases where the applicant is a minor, see the Household Size policy’s procedure section for help determining if the applicant should be considered a separate household or not.
- ✓ If it did not come up when asking about Other Program Participation, ask the family about adjunctive eligibility. Since a participant with this does not have to bring proof of income, ask about Adjunct Eligibility first.

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- ✓ Income Determination
  - o If the family has adjunct eligibility, tell them that the Medicaid/SNAP/FIP or Head Start automatically qualifies them for our program but we still need to collect a verbal estimate of their income sources and how much each is weekly, monthly or annually.
    - ▪ If the family reports zero income, they should be asked to describe their living circumstances and how they obtain basic living necessities such as food, shelter, medical care and clothing. Sources of income such as child support or assistance from sources not living in the economic unit, should be reviewed and recorded. Verbal can be used as the Proof in this case.
- ✓ If the family does not have Adjunct Eligibility, identify all of the sources of income the family has and require proof of these. Record in the data system.
  - o If the family reports zero income, they should be asked to describe their living circumstances and how they obtain basic living necessities such as food, shelter, medical care and clothing. Sources of income such as child support, or assistance from sources not living in the economic unit, should be reviewed.
    - ▪ If the applicant identifies a source of income in response to the questions leave the Proof field blank, tell participants to provide proof within 30 days, write an alert to follow-up, and issue only one month of food benefits.
    - ▪ If the applicant still reports zero income, print the Signed Statement from the Printouts drop down in the WIC data system and have them complete and sign the form. Select Affidavit for the Proof provided and consider the applicant income eligible. Scan the affidavit into the participant record.
- ✓ Ask if they are registered to vote where they currently live on the Voter Registration panel and select their "Yes" or "No" answer.
  - o If they say "Yes" to the first question, ask them to check "No" on the declination form (because they are already registered and this form just proves we did ask) and proceed per the Voter Registration policy on filing/scanning the declination form. Answer "No" to the question was a voter registration form completed today.
  - o If they say "No" to the first question, ask if they would like to register to vote today and select the appropriate answer to the question "Was a voter registration form completed today"
    - ▪ If they do register to vote, have them select "Yes" on the declination form, complete the voter registration form and proceed per the Voter Registration policy on filing/scanning the declination form and mailing in the voter registration form.
    - ▪ If they do not want to register to vote, have them select "No" on the declination form (this form proves we did ask) and proceed per the Voter Registration policy on filing/scanning the declination form.
- ✓ Is there anything you heard today that you should make sure to pass on to the CPA? (I.e. recent job loss, move, homelessness, new to the country, breastfeeding struggles?) Remember clients may say something to you about their situation and not repeat it because they have already told someone at WIC. Make sure to pass along this information to the CPA after assisting the family.