

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 for all new employees to facilitate consistent training. The checklist identifies core tasks. However, it is not intended to use in documenting the cross-training between positions that happens over time.

The WIC Coordinator should periodically review the checklist with the experienced staff person assisting with the on-the-job training and the new employee until it is completed. The checklist should be completed within a reasonable period of time.

When a task has been discussed or observed, the trainer should initial the appropriate column. Policy references are included throughout the checklist, their names in parentheses.

Note: Some topics are covered through the NETC modules, however discussion with the **on the job training (OJT)** coach is still important.

Completing the Checklist

The table below provides general guidelines for completing the checklist.

Step	Action
1	Complete the first page.
2	Prioritize the training tasks to address first based on clinic schedules, primary task assignments, and other factors.
3	Initial each task as it is discussed and observed.
4	Write N/A for not applicable in the columns for any tasks that the new employee will not be assigned.
5	File the checklist and document completion in the data system.

New Employee Training Checklist

Name:
Position:
Start date:
NETC date:
OJT coach:

Overview

Tasks to be completed before completing Level 1 of the WIC New Employee Training Course. See Local Agency Personnel Training policy for more information.

Step	Activity	Date Completed
1	WIC Coordinator requests data system access from state WIC office (Local WIC Agency Data Processing policy)	
2	Complete local agency orientation (Local Agency Personnel Training policy)	
3	Record training and continuing education on training and education record in the data system	
4	Observe one family unit during a certification appt.	
5	Observe and work alongside a co-worker for one clinic	

Note: Local agency staff must be provided complete training in the data system before they are granted security rights to the production system.

Communication

	Discussed	Observed
Policy and Procedure Manuals		
Protocol when calling the state WIC office (what is your local agency policy?) <ul style="list-style-type: none"> • WIC HelpDesk • (800) 532-1579 • WICHHD@idph.iowa.gov 		

Clinic Set-Up

Clinic Setting

	Discussed	Observed
Confidentiality <ul style="list-style-type: none"> • Clinic set-up (Clinic Environment policy) • Position of computer screens (Clinic Environment policy) • Conversations and phone calls • Participant information • Security access 		
Nondiscrimination policy, statement (USDA Nondiscrimination policy)		
And Justice for All poster (Complaints policy)		
Clinic ID signs on outside door		
No smoking sign (Contract Agency Policies and Procedures policy)		
Clinic flow (what is your local agency policy?)		
Promotes and supports breastfeeding (Clinic Environment policy)		
Customer service expectations (what is your local agency policy?)		

Data System Overview

	Discussed	Observed
Set up computers & printer/scanner		
Set up eWIC card readers and signature pads		
Set up work area for clinic, etc. (what is your local agency policy?)		
Security access for: WIC Coordinator, CPA Admin, CPA, Non-CPA-Professional, Support Staff Admin, Support Staff, Scheduler Only, LA Reports Only, View Only, Breastfeeding Peer Counselor		
Two-factor authentication and passwords		
Log into data system training environment		
Navigating the data system and File menu		
Physical security of computers, printer/scanner, and food instruments		
Computer and printer/scanner care and maintenance		
E-signature		
WIC Helpdesk		

Clinic Set-Up, Continued

Data System Fundamentals

	Discussed	Observed
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.)		
Alerts and comments		
Required fields		
Best practices and non-required fields		
Family ID and participant ID		
Record dates		

Clinic Services

Appointments

	Discussed	Observed
Information to give those making appointments (Processing Standards and Notice of Eligibility policy) <ul style="list-style-type: none"> • What participants need to bring with them • Appointment notices • Special arrangements needed 		
10/20 day scheduling requirement (Processing Standards and Notice of Eligibility policy)		
Length of certification periods (when to recertify) (Participant Categories and Certification Periods policy)		
Follow-up on pregnant women who miss their WIC appointment (Missed Appointment Follow-up policy)		
Late arrivals and walk-ins (what is your local agency policy?)		
Clinic closings policy (what is your local agency policy?)		
Scheduling return appointments (Processing Standards and Notice of Eligibility policy)		

Clinic Services, Continued

Scheduler

	Discussed	Observed
Select clinic		
New appointment (Processing Standards and Notice of Eligibility, Health Updates, and Nutrition Education policies) <ul style="list-style-type: none"> • Certification • Nutrition education • Nutrition class • Health update • Non-WIC appointment 		
Schedule, reschedule, cancel, move appointments		
Refresh appointments		
Recent family		
Income guidelines		
Print an appointment notice		
Copy appointments		
Marking status of appointments		

Clinic Services, Continued

Family

	Discussed	Observed
New family members		
Participant, parent/guardian, proxy		
Processing Standards		
Mailing and physical address		
VOC (transfer family to and from other clinics) <ul style="list-style-type: none"> • Responding to requests for participant information when a participant moves to another state • Incoming out-of-state transfers • Incoming in-state transfers • Providing VOC information to participants planning to move 		
Add a foster child		
FI issuance		
Contact/Address		
Transfer family		
Retrieve participant		
Organization of names <ul style="list-style-type: none"> • Primary parent/guardian • Secondary parent/guardian • Active participant • Non-active participant • Proxies 		
New Member/Proxy hyperlink		
Enrollment information/dual enrollment		
New participant type pop-up/Participant type history		
Alias hyperlink		
Notations on screen: FM, Foster, L, HR, VOC, Prov, BP		
Referred to WIC by		
Mother's education level		
FI Issuance		
Output language		

Clinic Services, Continued

Eligibility

	Discussed	Observed
Participant type and certification periods (Participant Categories and Certification Periods policy) <ul style="list-style-type: none"> Serving applicants who live in another service area Address (not legal status) 		
Income guidelines		
Adjunctive eligibility (Adjunctive Eligibility policy)		
Voter registration (Voter Registration policy)		

Identity

	Discussed	Observed
Proof of identity <ul style="list-style-type: none"> Acceptable forms of identity Exceptions to policy 		
Physically seen at certification (Physical Presence Requirements policy)		

Income (Income Determination, Household Size and Adjunctive Eligibility policies)

	Discussed	Observed
Household or family size <ul style="list-style-type: none"> Definition of a household Pregnant women and household size Definition of homeless status Reported changes in household members 		
Adjunctive eligibility <ul style="list-style-type: none"> What it is and why Acceptable forms of proof Follow-up requirements Reported changes in program participation 		
Proof of income <ul style="list-style-type: none"> What is counted and what is not Acceptable forms of proof Exceptions to policy How to handle reports of zero income (Income Determination policy) Current income guidelines (Income Guidelines policy) Reported changes of income Income family and foster children Follow-up requirements 		

Print notice of ineligibility (Processing Standards and Notice of Eligibility policy)		
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Address (Residency Requirements policy)

	Discussed	Observed
Acceptable forms of proof		
Exceptions to policy		
Definition of homeless		
Definition of migrant status		
Definition of refugee status		
Follow-up requirements		

Other Issues

	Discussed	Observed
Voter Registration (Voter Registration policy) <ul style="list-style-type: none"> Who to give form to Filing forms/retention requirements 		
Participant violations overview (Participant Violations and Sanctions policy)		
Participant transfers (VOC) (Verification of Certification policy)		
Physical presence requirement (Physical Presence Requirements policy)		
Affidavit reasons		
Print signed Statement for Identity, Address and Income		
Scanning documents		

Health and Nutrition Assessment

Health and Nutrition

	Discussed	Observed
Pregnancy and postpartum data <ul style="list-style-type: none"> Autofill EDD or LMP Link to infant 		
Breastfeeding <ul style="list-style-type: none"> Feeding history of the infant Link to mother Issue breast pump 		

<p>Blood</p> <ul style="list-style-type: none"> • Referral data • Trend graph • Deferred results • Normal results • Lead level measurement 		
<p>Anthro</p> <ul style="list-style-type: none"> • Referral data • Birth measurements for children less than 2 years of age • Chart list (print a growth chart) • Growth charts age-adjusted for prematurity • Flexible weight controls • Weeks gestation • Inaccurate reasons 		
<p>Nutrition Interview</p> <ul style="list-style-type: none"> • Participant centered • Use of the starters/prompts • Print Release of Information form 		
<p>Risk</p> <ul style="list-style-type: none"> • Auto-assigned nutrition risks • Manually assign nutrition risks • Manually assigning someone as high risk 		
<p>Referrals</p> <ul style="list-style-type: none"> • Print Referral from the WIC Program form 		
<p>Nutrition Education</p> <ul style="list-style-type: none"> • Completed nutrition education • Planned nutrition education • Copy completed nutrition education topics for family members • WICHealth.org 		
<p>Care Plan</p> <ul style="list-style-type: none"> • High risk participants require complete SOAP note • Print a care plan 		

Health and Nutrition Assessment, Continued

Measurements (Anthropometric Measurements policy)

	Discussed	Observed
Using referral data for height and weight		
Weight measurements		
Recumbent length measurements		
Standing height measurements		
Growth charts		
Explain pediatric growth charts		
Explain a pregnancy weight gain chart		
Health and nutrition history cards		

Blood Tests (Blood Tests policy)

	Discussed	Observed
Puncture resistant container for lancets (Infection Control Guidelines policy)		
Gloves		
Regular hand washing		
Use of non-invasive pulse co-oximeter		
Blood drawing technique for hemoglobin		
HemoCue control sample and log		
Close cuvette container after each use		
Explain results of blood test		
Blood testing schedule		
Documenting on Hemoglobin log sheet		
Using referral data		
History of lead screening for all participant categories <ul style="list-style-type: none"> • Referrals for infants and children screened 		

Nutrition Assessment (Nutrition and Health Assessment policy)

	Discussed	Observed
Infant nutrition interview		
Child's nutrition interview		
Women's nutrition interview		
Dietary nutrition risks (Nutrition Risk Definitions policy) <ul style="list-style-type: none"> • Medical nutrition risks • Dietary risks • Auto-assigned vs. manual • High risk conditions 		

Care plans for high-risk participants (Nutrition Care Plans and Nutrition Education Contacts policy)		
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Other Issues

	Discussed	Observed
Care plans for high-risk participants (Nutrition Care Plans policy)		
Water testing for bacteria and nitrates (Referrals to Programs and Agencies policy)		
Fluoride status of household water supply (Referrals to Programs and Agencies policy)		
Time studies for nutrition education reporting (Reporting WIC Personnel Costs policy)		
Immunization status of infants and children (Immunizations policy)		
Substance use and abuse (Substance Abuse Screening and Referral policy) <ul style="list-style-type: none"> • Written information to all pregnant women • List of available treatment centers and programs 		
BF PC Documentation (if applicable)		

Final Eligibility Determination/Certification

	Discussed	Observed
Certification end date		
Categorical eligibility end date		
Troubleshooting unsuccessful certification		
Violations		
Termination		
Reinstate		
Applicant Rights and Responsibilities (Rights and Responsibilities policy) and use of the Signature Pad		
Print Notice of Termination (Terminations policy)		
Print Notice of Violation		
Print Notice of Ineligibility (Processing Standards and Notice of Ineligibility policy)		
Role and signature of Competent Professional Authority (CPA) (WIC Service Delivery policy)		

Referrals

Process

	Discussed	Observed
Referral from the WIC Program form (Referrals policy)		

Request for Information form		
Referral agencies (local agency specific)		
Follow-up on referrals (local agency specific)		
Participant/Family Referrals		
Sharing of WIC data (Confidentiality of Participant Information policy)		

Examples

	Discussed	Observed
Health Services Application (Referrals to Medicaid and hawk-I policy)		
<i>hawk-i</i> Application (Referrals to Programs and Agencies policy)		
Medicaid guidelines (Referrals to Programs and Agencies policy)		
Maternal Health (Referrals to Programs and Agencies policy)		
Child Health ((Referrals to Programs and Agencies policy)		
Family Planning (Referrals to Programs and Agencies policy)		
Public health nursing (Referrals to Programs and Agencies policy)		
Early ACCESS		
Immunizations (Immunizations policy)		
Blood lead levels (Lead Poisoning Screening policy)		
EFNEP and FNP		
Head Start and Early Head Start		
Oral health (Referrals to Programs and Agencies policy)		
Tobacco cessation		
Other community resources (local agency policy)		

Participant Education

Nutrition (Nutrition Education Contacts and Nutrition Education Materials policy)

	Discussed	Observed
Initial contacts at certification		
High-risk second contacts		
Low-risk second contacts		
Exit contacts for postpartum women		
Scheduling second ed contacts		
Documenting second ed contacts		
Print materials (nutrition education, breastfeeding, outreach, and program forms) and how to order		

Breastfeeding (Issuing Breastfeeding Equipment policy)

	Discussed	Observed
Issuing breast pumps and other equipment		
Breastfeeding teaching resources		
Keep breast pumps and breastfeeding equipment secure		

WIC Foods

Food Instruments

	Discussed	Observed
Food Package <ul style="list-style-type: none"> • Model food packages • Categories/Subcategories • Add/remove food • Tailor food packages Special formula documentation		
Issuing a PAN and eWIC card		
Participant PIN selection		
Deactivating eWIC cards		
Issuing benefits to the eWIC card		
Capturing a signature using the Signature Pad		
Calendar Month		
Proxy policy (Proxies policy) <ul style="list-style-type: none"> • Form or required information • Documenting in data system 		
Reissuing benefits as a result of a food package change		
Audit Trail		
Mailing food instruments (Issuing Food Instruments policy)		
Missed FI pick-up policy (L/A policy)		
Lost/stolen food instruments (Lost or Stolen Food Instruments policy)		
Supply and security of WIC FIs		
Use of the Participant Customer Service IVR or web portal		

Food Packages (All food package policies)

	Discussed	Observed
Approved foods for each participant category		
Maximum amount of formula		
Substitutions in food items		
Coupons with WIC benefits		
Special offers: extra ounces; buy 1, get 1 free		

WIC Foods, Continued

Formulas (Special Women and Children Food Packages, Infant Food Packages and Medical Documentation policies)

	Discussed	Observed
Current contract infant formulas		
Exceptions for non-contract infant formulas		
Approved special formulas		
Formula warehouse process (procedure)		
Locating a special purpose vendor		
Documentation for Medicaid regarding special formulas		
Returned formula (Infant Formula Returns policy)		
Keep returned formula secure and out of view of participants		

Other Issues

	Discussed	Observed
New participant education (New Participant Education policy)		
Describe how to use eWIC card (Participant brochure)		
Approved vendors in the service area (local agency list)		
Physical security of FIs (Local Agency Data Processing policy)		
Ordering eWIC cards		
Farmers' Market Nutrition Program		

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