

**COLORADO WIC**  
**CERTIFICATION PROGRAM**  
**ORIENTATION MANUAL**

**Level I**



Colorado Department of Public  
Health and Environment  
Nutrition Services/WIC Program  
4300 Cherry Creek Drive South  
Denver, Colorado 80246-1530

## Module Evaluation Questionnaire Orientation Manual

Dear Reader:

Your comments on this module would be helpful. After completing the module, please respond to the following questions and fax or mail them to:

Training Coordinator  
Colorado Department of Public Health and Environment  
FCHSD-NS-A4 WIC Program  
4300 Cherry Creek Drive South  
Denver, CO 80246-1530  
Fax: 303-756-9926

Check the appropriate title of your position:

- Educator, Clerk, Assistant
- Nutritionist
- Nurse
- Supervisor
- Director

1. How many hours did it take you to complete this module (actual hours spent)? \_\_\_\_\_
2. On a scale of 1-3, how understandable were the concepts? Circle the number that most closely describes your thoughts.  

1 = Easy to understand      2 = Understandable      3 = Hard to understand
3. On a scale of 1-3, how understandable were the activities? Circle the number that most closely describes your thoughts.  

1 = Easy to understand      2 = Understandable      3 = Hard to understand
4. On a scale of 1-3, how readable was the module? Circle the number that most closely describes your thoughts.  

1 = Easy to read      2 = Okay to read      3 = Difficult to read
5. A different print was tested with this module. Please respond and comment on it.  

\_\_\_\_\_ I liked it      \_\_\_\_\_ I didn't like it
6. Please share any questions, comments, suggestions that you generated while working through this module.

*Thank you for completing this questionnaire.*

WIC CERTIFICATION PROGRAM

LEVEL I

ORIENTATION MANUAL

Many thanks to the staff in the Boulder, El Paso, Jefferson and Tri-County agencies for their valuable contributions to this manual.

Your questions and comments are welcome. Please forward them to:

Training Coordinator  
Colorado Department of Public Health and Environment  
Nutrition Services/WIC Program  
4300 Cherry Creek Drive South  
Denver, Colorado 80246-1530  
303-692-2400

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## Preface



Welcome as a new team member to the Special Supplemental Nutrition Program for Women, Infants, and Children, better known as WIC! After observing in the clinic for a few days, you may be wondering how you will ever know all of the WIC Program's details and be able to start serving clients any time in your life time! Most of us feel this way when we start a new job.

Fortunately, in the Colorado WIC Program there is a training program that will gradually help you to develop the knowledge and skills necessary to successfully do your job. Going through the WIC training program is somewhat like the steps a beginning hiker takes to adequately prepare for his/her goal, even if it is as lofty as climbing Pikes Peak.

Step-by-step you will learn all of the WIC Program components; some in formal training and others on-the-job. In your WIC agency you may be responsible for any of the following: introducing WIC to members in your community, determining applicant eligibility, collecting nutrition/health data, assessing nutritional status, promoting and supporting breastfeeding, using WIC's computer system, providing nutrition education and counseling, issuing WIC checks and linking clients to other health care providers.

1 This manual will guide you through some of the first steps necessary to gain the skills for your new position. Namely, to learn background information about the WIC Program, its functioning and your role.

2 The second step to become skilled in your job is to attend the **New Employee Training**. At this training, you will quickly learn about and practice using WIC's computer program, ASPENS. You will also participate in the discussion of and practice using the skills needed for successful interactions when educating WIC participants about nutrition. Ideas on breastfeeding promotion and support are also included in this training.

3 The third step, which is really a set of smaller steps, is to work through and master a series of Self-Guided Modules. Completing these and passing the post tests will enable you to be a full-fledged Certified WIC Authority (CWA).

2 And, when you can, take the opportunity to observe other staff in clinic! This is how you will pick up many Atricks of the trade® and learn the bigger picture of your new position and organization.

1 So let's begin on the path that leads to the top of Pikes Peak.



## HOW TO USE THIS MANUAL

The Orientation Manual is the foundation for learning about the WIC Program. Each section contains a number of learning activities which could include:

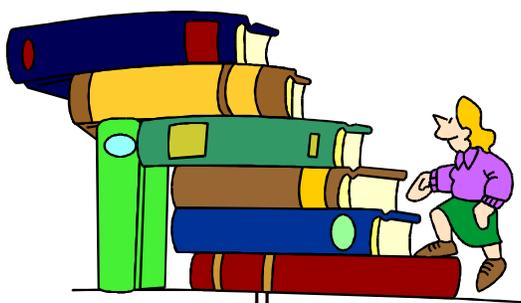
- ◆ reading,
- ◆ responding to questions,
- ◆ viewing a video,
- ◆ discussing or role playing topics with another staff member, and
- ◆ practicing on-the-job.

Each section begins with performance objectives that you should be able to achieve at the completion of the manual. It is best to complete the sections in the sequence they are presented. Before beginning, discuss the training with your supervisor. Someone in your clinic should be available to demonstrate the techniques and skills you will need to become proficient in your job. Find out from your supervisor if there are any special instructions for you and who you should go to for assistance, such as a trainer or preceptor. Attached to the back of this module is a sheet entitled "Supervisor Check List." Please remove this sheet and give it to your supervisor as soon as possible.

The reference books you will use along with the Orientation Manual are the Colorado WIC Procedure Manual and the ASPENS Clinic User Procedures Manual. Have these within reach as you begin this manual. These manuals will become as important to you on the job as a trail map is to a hiker.

You must study, think, and practice to acquire the skill and gain the confidence needed to provide WIC services. If you have questions during your training, do not hesitate to ask your supervisor or your trainer for the answers.

The WIC Program provides specific, nutritious foods, nutrition education and health care referrals to pregnant, breastfeeding and postpartum women, and to infants and children up to their fifth birthday. Take pride in knowing that you are contributing to a program that improves its recipients' quality of life.



## SECTION I: WELCOME TO THE CERTIFICATION PROGRAM

### PERFORMANCE OBJECTIVES

Upon completing this section, you should be able to:

1. Describe two main parts of the WIC Certification Program.
2. Create a schedule for your completion of the WIC Certification Program.
3. Identify and locate resources in the clinic that will provide information to do your job.

### The Colorado WIC Certification Program

The Colorado WIC Program has over 40 agencies. Each agency is required to incorporate the Colorado WIC Certification Program into their own local training program. Some agencies will provide a separate training for you while others may use primarily on-the-job training in conjunction with the certification program.

At the WIC Clinic, the Certified WIC Authority (CWA) is the person who determines the applicant's risk factors. This person has completed the certification program and will review your work until you become a CWA. Think of them as the mountain guide who takes the beginning hiker on their first trek. For WIC Educators in training, a CWA should initial care plans and assessment forms and ensure that all eligibility criteria are correct.

To prepare you to become adept at almost any WIC situation, the certification program is specially designed to provide a variety of learning experiences.

The Certification Program has two main parts: New Employee Training and Certification Modules.

- ◆ New Employee Training - A three-day training held at the State WIC Office that provides an introduction to the WIC Program, Colorado WIC's computer system --ASPENS (Automated Systems Project for Enhanced Nutrition Services), nutrition education, and breastfeeding promotion and support.
- ◆ Certification Modules - Individual study modules which are divided into three levels. Level I focuses on WIC policies and procedures while Level II and III contain information on nutrition, health, and providing nutrition education.

The modules are designed for self-paced learning. At the end of this unit is a form you will use to set up timelines to plan your learning journey, following the guidelines. Your supervisor or trainer is available to assist with your questions, keep you on track, and evaluate your performance throughout the modules.

The modules contain a wealth of information you may need to refer to from time to time. It is recommended you keep them in a binder for future reference. And, as modules are revised, keep a copy of the most recent revision on hand. A description of each module level follows.

## **Level I**

Level I consists of training experiences that enable you to:

- discuss the purpose of WIC;
- understand and perform the procedures to determine eligibility of clients, including collecting height, weight, and hematocrit data, and screening dietary information;
- enroll WIC participants and provide explanation for their eligibility;
- refer participants to other health care providers/agencies; and
- issue WIC checks (includes tailoring food packages).

### **Level 1 materials include:**

- ▶ Orientation Manual and "Introduction to WIC" video (Complete before attending New Employee Training.)
- ▶ Diet Screening Module and Post Test
- ▶ Screening Module and Post Test
- ▶ WIC Food Package Module and Post Test
- ▶ Explanation of the Colorado WIC Program Nutrition Risk Factors Module
- ▶ Providing Drug Abuse Information & Referrals/Study Guide "Video" and Post Test
- ▶ Civil Rights Module
- ▶ Observation Checklist - Supervisor will complete
- ▶ Chart Audit Checklist - Supervisor will complete

All of these must be completed within three months of employment. A minimum score of 90% must be achieved on all tests. Anyone scoring less than 90% on a test must retake it until a passing grade is obtained. Find out from your supervisor who will grade your tests. Smaller agencies typically send the tests to their Nutrition Consultant at the State WIC Office.

## **Level II**

Level II consists of information and learning experiences to develop and reinforce your understanding, confidence and ability to work with clients on nutritional issues of pregnancy, infancy, childhood, breastfeeding, and adolescence.

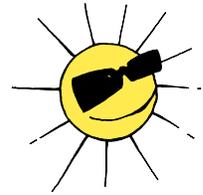
### **Level II materials include:**

- ▶ Prenatal Nutrition Module and Post Test
- ▶ Breastfeeding Module and Post Test
- ▶ Infant Nutrition Module and Post Test
- ▶ Preschool Nutrition Module and Post Test
- ▶ Adolescent Nutrition Module and Post Test

All module post tests in Level II must be completed within six months of employment. A score of 90% must be achieved. Anyone scoring less than 90% on a test must retake it until a passing grade is obtained.

### Level III

Level III consists of learning experiences to develop and reinforce the trainee's skills and techniques used in interviewing and providing nutrition education.



Presently, there is one module to complete:

- ◆ *Bright Ideas* Nutrition Education Skills Module with Activity Worksheets, a video and an Evaluation Tool.

This module requires that each unit be practiced and short discussions take place with your supervisor or trainer. The *Bright Ideas* Nutrition Education Skills Module must be completed within **18 months** of employment. Find out from your supervisor who will collect your Activity Worksheets. Smaller agencies typically send these to their State Nutrition Consultant.

Well, what are you thinking about these three levels? A little overwhelming? Have you ever stood at the base of a mountain and wondered how you or anyone could walk to the top? Step by step one can reach the summit. In WIC, proceed the same way, one step at a time. Take the first step by gathering up the materials (modules and videos) and completing the WIC certification program "Plan for Learning" (following this section).

### Modifying the Certification Program

Occasionally local agencies delegate various WIC duties to non-WIC staff. Most common examples of this are when an agency assigns the tasks of collecting heights, weights, and hematocrits to a screener, or when the evaluation of a person's eligibility is determined over the phone or in person by an intake worker.

To ensure these individuals are adequately trained, it is required they complete the appropriate portions of the Colorado WIC Certification Program within 6 months of employment and with a passing score of 90% or above as well.

For example, the recommended training materials for a screener with the responsibilities of measuring and plotting height and weight and collecting blood specimens would be to complete the Orientation Manual, Screening Module, Civil Rights Module and the Observation Checklist.

The recommended training materials for an intake worker who performs clerical duties (e.g., determines eligibility over the phone, makes appointments), would be to complete the Orientation Manual, New Employee Training if using ASPENS, and the Civil Rights Module.

### Professional Development

In addition to the certification program it is required that all WIC staff are periodically trained and updated on nutrition and related health issues. In fact, all staff are expected to attend at least two training sessions each year. The State WIC Office typically offers at least one educational opportunity each year such as a State Meeting or regional workshop. Find out from your supervisor what other training opportunities are available each year.

## Resources

Many resources are available from the State Office to help you stay current on health and nutrition topics. Some of these resources you will receive directly in mailings from the State Office and others you can obtain by contacting the State WIC Office.



Resources you will receive directly in the mail include:

- ◆ *Colorado WIC News* - a monthly newsletter which highlights program and nutrition information specific to the Colorado WIC Program. This is your primary source of new information.
- ◆ *Nutrition Update* - a newsletter (published 3-4 times a year) which focuses on specific nutrition and health topics and is distributed to all nutritionists and nurses.
- ◆ *Breastfeeding Communique* - a semi-annual newsletter highlighting breastfeeding topics. It is distributed to all WIC staff.
- ◆ *Colorado Breastfeeding Update* - a quarterly newsletter for health care providers which is sent to agencies for distribution in their communities.
- ◆ *WIC's World* - a quarterly newsletter which is distributed to WIC vendors (i.e., stores participating in the WIC Program) and a copy is sent to each WIC agency.

Resources that should be available already in your clinic:

- ◆ *Alcohol and Drug Abuse Division Licensed Treatment Program Directory* - This directory provides a list of substance abuse treatment programs throughout the State.
- ◆ *ASPENS Clinic User Procedures Manual* - This manual provides step by step instructions to using the WIC computer program.
- ◆ *Colorado WIC Formula and Medical-Nutritional Product Guide* - This is primarily a reference book for use by the nutritionist or nurse. It provides general information on commercial formulas, special infant formulas, and medical foods. It identifies the products that are available through WIC.
- ◆ *High and Moderate Risk Protocols* - This is a reference for the WIC nutritionist or nurse. It outlines protocols for providing care to participants as being at moderate or high nutritional risk.
- ◆ *WIC Policy and Procedure Manual* - This manual contains all of the regulations, procedural, financial and reporting requirements of the USDA and the Colorado WIC Program.
- ◆ *Colorado WIC Mini-Manual* - This manual is a condensed version of the WIC Policy and Procedure Manual. It is to be used as a reference for routine WIC procedures. You will either inherit a copy from a WIC predecessor or receive a copy in new employee training.

There are also resources at the State Office that are available to you on loan. The lending library consists of books, videos, journals and slide presentations covering topics such as breastfeeding, children with special needs, counseling, dental, drug, alcohol, and other substance abuse, general health, general nutrition, management and training, pregnancy, teen pregnancy, cultural health and nutrition. Locate these two directories in your clinic: *Book List* and *Audio Visual Lending Library* to learn what resources are available and how to order them.

REINFORCEMENT ACTIVITIES

1. Take a moment now to locate a copy of each of the newsletters, manuals, guides and directories listed on the previous page. If you can not find all of them, ask your supervisor or trainer to show them to you. Place a check by the titles to verify that you were able to locate these resources.

     *Colorado WIC News*

     *Nutrition Update*

     *Colorado Breastfeeding Update*

     *Breastfeeding Communique*

     *WIC Policy and Procedure Manual*

     *High and Moderate Risk Protocols*

     *Alcohol and Drug Abuse Division Licensed*

     *Treatment Program Directory*

     *ASPENS Clinic User Procedure Manual*

     *WIC's World*

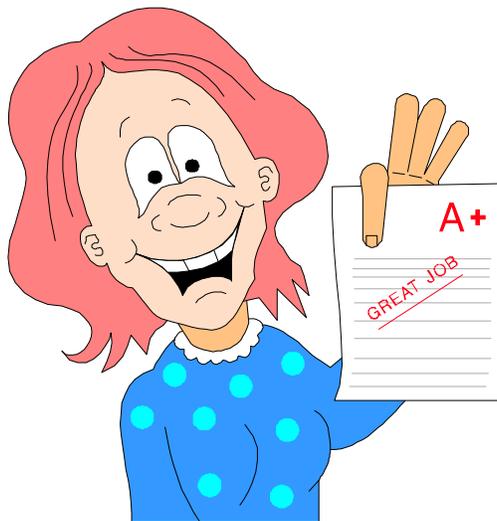
     *Colorado WIC Formula and Medical-Nutritional*

     *Product Guide*

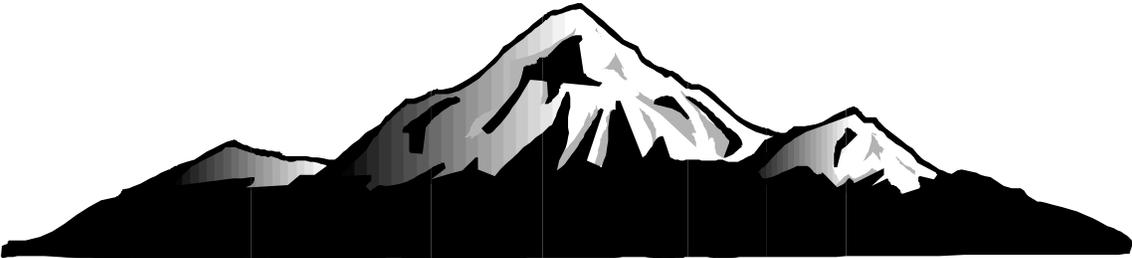
2. What is the newsletter that provides you with monthly up-to-date Colorado WIC Program information?  
\_\_\_\_\_

3. On the next page, complete the form to plan your journey through the certification modules.  
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GREAT JOB! No matter what position you have in the WIC Program, your new job will be exciting, rewarding, and challenging!!







## SECTION II: INTRODUCTION TO THE WIC PROGRAM

If you are setting out to climb Pike's Peak for the first time, you probably would want to know a few things. You might like to know the height of the mountain, the amount of time it takes to climb for most people, what the terrain is like, how much experience you should have, etc. It helps to have some facts and information in order for you to prepare. The same idea is true when you begin working with the WIC Program. Background information can help you to feel more confident and be more successful in your job.

### PERFORMANCE OBJECTIVES

Upon completing this section, you should be able to:

1. Define and describe the WIC Program to an applicant.
2. Identify which federal agency administers the WIC Program.
3. Identify which state agency directs the WIC Program in Colorado.
4. Discuss at least three ways the State's role differs from the local agency's (county's) role in the administration of the WIC Program.
5. Use the Colorado WIC Program Procedure Manual as the source to retrieve information on policies and procedures for the WIC Program.

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So, what is WIC? Let's find out. Complete the following activities, then respond to the questions to check how well you captured the details.

### LEARNING ACTIVITY - IIA

#### UNDERSTANDING THE WIC PROGRAM



View the video *Introduction to WIC* (a copy should be available at your clinic, otherwise call the State Office). Listen to information about who is eligible for WIC, what the WIC foods are and who they are for, and how WIC checks are used in the store.

Read Overview of the WIC Program on the following pages. This overview will let you know just how important the WIC Program is to our nation and to Colorado. You will be more successful when you talk to people about WIC if you have some enthusiasm and a general understanding of the WIC Program.

Then, answer the Self Check questions following the overview.

### OVERVIEW OF THE WIC PROGRAM



What is WIC?

WIC is a program officially named the "Special Supplemental Nutrition Program for Women, Infants, and Children." Congress created the WIC Program because studies showed that when women suffer from malnutrition during pregnancy, they and their unborn children are likely to have health and nutrition problems.

The most important times of a person's development are as a fetus, infant and young child. During these stages the body's future capacity for both physical and mental growth is determined. A proper supply of nutrients, from nutritious foods, can make the difference between a healthy child and one whose nervous system and brain cells never develop to their full potential.

Because women and children with lower incomes are more vulnerable to poor nutritional status, Congress formally recognized the need for free and nourishing foods by passing specific legislation to establish the WIC Program in 1972.

The WIC Program's Three Main Benefits

There are three main benefits to the participant on the WIC Program: nutritious foods, nutrition education and health care referrals.

**Nutritious Foods** - The WIC Program provides nutritious food to supplement the regular diet of pregnant women, new mothers, infants, and children under age five who meet income standards and qualify as "nutritionally at risk" based on a health assessment.

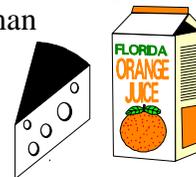
The WIC food package is an **individual monthly food prescription** determined by the WIC staff. Some of the foods available include: milk, cheese, eggs, cereal, juice, dried beans, infant formulas, tuna, carrots and peanut butter. The foods in the packages vary. For example, the mother of an exclusively breastfed baby (that is, she doesn't receive WIC formula) obtains a few additional types of foods (e.g., carrots and tuna) and larger quantities of some foods (e.g., juice), than a breastfeeding woman who feeds her baby with some WIC formula too.

The foods offered on the WIC Program were selected because they are rich nutrients especially important for proper growth and development. These nutrients include:

- protein      calcium      Vitamin A
- iron          folate          Vitamin C

The full effect of improving nutritional status is achieved only if the WIC foods are consumed by the Program participant, not other family members.

**Nutrition Education** - The Program also provides nutrition education to adult participants and to the parents and caretakers of child participants. They learn about the participant's specific nutritional needs, the nutrients necessary in the human diet and the foods that contain them. They are taught to shop for nutritious foods and to prepare well-balanced, economical meals.



## Section II: Introduction to the WIC Program

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**Health Care Referrals** - A major benefit of the WIC Program is the linkage to health care and community services for families that might otherwise have little contact with those services. WIC encourages all participants to obtain complete preventive and social service support through referrals to:

- |  |                            |
|--|----------------------------|
| P immunizations                                | P dental care              |
| P prenatal care                                | P substance abuse help     |
| P food banks                                   | P Medicaid                 |
| P Food Stamps                                  | P well child clinics       |
| P breastfeeding support services               | P other community services |
| P HIV testing, counseling, and treatment sites |                            |



Studies have shown that WIC participants are more likely to visit health clinics for early prenatal care and periodic health exams for their children.

### Getting On the WIC Program Is Easy

To be eligible, applicants must:

- fit into a category as an infant, child up to five years of age, pregnant or breastfeeding woman (up to one year postpartum), or a woman who delivered up to six months ago,
- meet income guidelines (income less than or equal to 185% of the poverty level),
- live in the county where they are seeking eligibility, and
- have a documented nutrition and/or medical risk.

To apply, the applicant contacts the WIC clinic --usually by phone--and answers brief questions about their place of residence and income. At the first appointment, WIC staff perform basic assessments to determine the presence of nutrition risk factors. These assessments are made through the collection and review of anthropometric data (height or length and weight), hematological data (hematocrit or hemoglobin), and diet assessment. Examples of nutrition risk factors for women are obesity, poor weight gain during pregnancy, anemia, a history of a premature birth, and poor dietary patterns. Examples of nutrition risk factors for children and infants are under-weight, obesity, slowed growth, anemia, and poor dietary patterns. If eligible, participants receive checks imprinted with their food package to redeem at approved grocery stores.



### Who Supports the Local WIC Program?

Funding for WIC originates with the United States Department of Agriculture (U.S.D.A.). All WIC services are provided at no cost to eligible participants. The USDA provides funds to State health agencies, Native American agencies, and other organizations to administer the WIC Program. In Colorado it is the Department of Public Health and Environment that receives the funds. This money is used for food, nutrition education, breastfeeding promotion, nutrition assessments, and administration. The State WIC Office distributes the money to local WIC Programs.

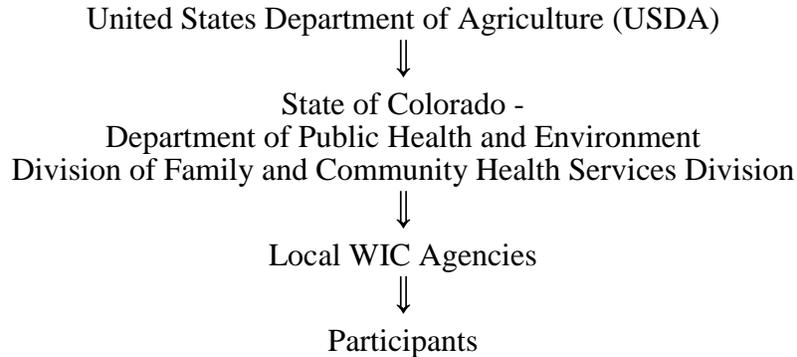
In Colorado, the local programs are part of health care agencies such as health departments, community health centers, and nursing services. Colorado also has a Native American agency which operates independently from the State Department of Public Health and Environment.

## Section II: Introduction to the WIC Program

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The State agency approves the local sponsors, develops the food delivery systems, and monitors the operations of all local WIC Programs in the State. The local agencies certify participants, keep medical records, provide nutrition education, and distribute WIC food checks.

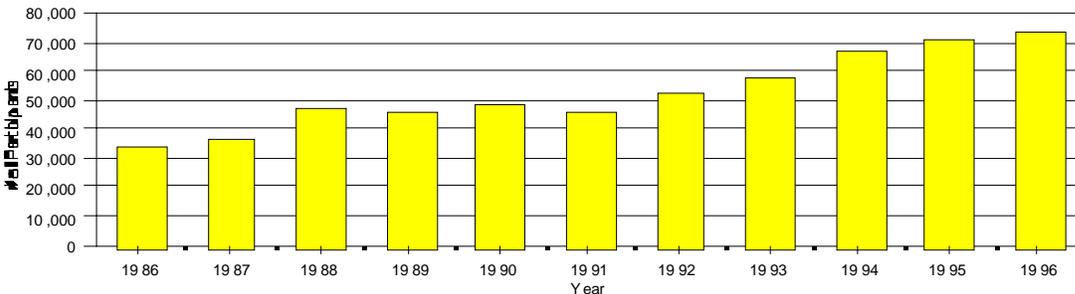
The WIC funding pattern is summarized in the diagram below:



### WIC's 25-year Climb: Highlights of WIC's History

The WIC Program was established on September 26, 1972 and authorized by Public Law 92-433. Initially, WIC was a small two-year pilot project serving approximately 205,000 participants with a \$20 million annual budget. By the mid-nineties, the Program was serving 7.4 million people, including 1.8 million infants and 3.89 million children, with an annual cost of about \$3.7 billion. The Program now operates in 50 State agencies, 32 Indian Tribal Organizations, the District of Columbia, the Virgin Islands, American Samoa, Guam, and Puerto Rico.

Participation in Colorado



The WIC Program in Colorado began in 1974. Local agencies served a total of 2,870 participants at the end of 1974. Participation in Colorado has more than doubled in the ten years between 1986 (with 33,439 participants) and 1996 (with 73,764 participants). See the figure above.

### WIC Research Findings

Over 70 evaluation studies demonstrate the effectiveness of WIC and prove medical, health, and nutrition success for women, infants and children.

Numerous studies show that pregnant women who participate in WIC seek earlier prenatal care and consume a more healthy diet. They have longer pregnancies leading to fewer premature births; have fewer low and very low birth weight babies and have fewer fetal and infant deaths. A low birth weight infant is twenty times more likely to die than a normal birth weight infant.

## Section II: Introduction to the WIC Program

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In 1997, it cost \$544 a year for a pregnant woman to participate in WIC. By contrast, it cost \$22,000 per pound to nurture a low or very low birth weight baby to the normal weight of seven pounds in a neonatal intensive care unit. WIC prenatal care benefits reduce the rate of very low birth weight babies by 44%.

One study by the Massachusetts State Health Department found that the WIC Program also significantly decreases the death rate of newborns. In the WIC group, there were 12 deaths per 4,128 live births compared to 37 deaths per 4,128 live births in the non-WIC comparison group.

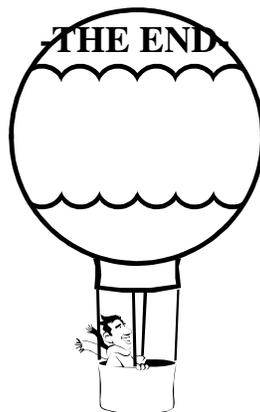
Another study found that for every \$1 spent on pregnant women in WIC produces \$1.92 to \$4.21 in Medicaid savings for newborns (due to the reduced number of low birth weight infants needing extended hospital care) and their mothers.

Breastfeeding helps mothers feel close to their baby, and the breastmilk contains all the nutrients infants need to grow and develop. Breastfed infants tend to be healthier. In Colorado, exclusively breastfeeding a WIC infant saves approximately \$160.00 in the first six months of life from lower WIC and Medicaid costs.

Additionally, infants with low birth weights who do survive often continue to need services such as the Special Supplemental Income (SSI) provided under the Social Security Act and often need special education. The cost of providing SSI to 540 survivors at an average level of \$2,400 per year for 30 years would be \$39 million. The cost of providing special education to the same survivors at \$5,000 per individual for 12 school years would be another \$23 million.

The benefits of WIC also apply to the child population of WIC. The National WIC Evaluation found that WIC improves children's dietary intake, reduces iron deficiency anemia, improves cognitive development and improves immunization rates.

These findings illustrate the success of WIC's primary elements; namely, nutritious food, nutrition education and health care referrals, on the health and well-being of women, infants, and children nationwide. There are many documented studies that prove WIC's effectiveness. So now you understand the value of the work you will do in WIC!



Now that you have watched the video and read the Program overview, look over the questions listed below. Can you answer all of them? If not, mark those questions with an "x" to remind yourself to discuss these with your trainer.



**SELF CHECK:**

1. Which categories of women and children are eligible for the WIC Program?
  
2. What four requirements must an applicant meet to be eligible for the WIC Program?
  
3. What are 6 of the main nutrients supplied in the WIC foods?
  
4. What are three main benefits the WIC Program provides?
  
5. Circle the foods that are provided on the various food packages.
  - eggs
  - dried beans
  - fresh carrots
  - canned beans
  - Hi-C Fruit Drink
  - peanut butter
  - iron rich cereals
  - domestic cheese
  - imported cheese
  - milk
  - canned carrots
  - enriched bread
  - juice
  - cream cheese
  - tuna fish
  
6. Who should eat the WIC foods?
  
7. Does the WIC food package provide all the foods necessary for good health?

8. Can a participant change the size or amount of a food prescribed on the WIC food package?
  
9. At the grocery store, when should the WIC participant present her WIC check to the cashier?
  
10. Should the WIC participant pay money and/or receive change for the WIC foods?

**ANSWERS** Check and learn how you did. Discuss any questions with your trainer.

1. Pregnant women  
Breastfeeding women for up to one year postpartum  
Postpartum non-breastfeeding women for up to their sixth month postpartum  
Infants up to their first birthday  
Children 1 to 5 years of age
2. Categorical eligibility (as described above)  
Live in Colorado in a WIC Program service area  
Household must meet income guidelines (185% of the poverty level)  
Individual must be determined to be at medical/nutritional risk
3. Vitamin A, vitamin C, calcium, iron, protein and folate
4. Nutritious supplemental foods  
Nutrition education  
Health care referrals
5. Circled: eggs, peanut butter, dried beans, juice, iron rich cereals,  
fresh carrots, canned carrots, tuna fish, domestic cheese, milk
6. The WIC participant
7. No
8. No
9. Before the clerk rings up the foods
10. No

**REINFORCEMENT ACTIVITIES:**



1. Observe a WIC staff person providing WIC services to a new applicant. As you watch, listen to how she/he discusses and describes the following:
  - The services provided by WIC.
  - The client's eligibility.
  - The food package the client will receive.
  - Use of the WIC checks.Jot down some of the main ideas you observed and heard in the space below:

Section II: Introduction to the WIC Program

2. Below is a WIC check. Locate a copy of the AWIC Allowable Foods List<sup>®</sup> in your clinic. The next time you are in the store, take a copy of this check and see if you can find and select the appropriate foods on your check. How long did it take to find the approved items? \_\_\_\_\_  
 What difficulties or experiences did you have?

<b>WIC</b>		<b>Special Supplemental FOOD PROGRAM for Women, Infants and Children</b> <small>COLORADO DEPARTMENT OF PUBLIC HEALTH AND ENVIRONMENT (303) 692-2400          4300 CHERRY CREEK DRIVE SOUTH, DENVER, COLORADO 80222</small>		<b>No. 00000247</b>		
SEQUENCE NO.	WIC I.D. NO.	NAME OF PARTICIPANT	PACKAGE	CLINIC		
00000247	003-6831091	NEW WIC STAFF	BX100 1	01607		
PAY TO THE ORDER OF: <b>KING SOOPERS #33                  TABLE MESA</b>		Norwest Bank Denver, N.A. 1700 Broadway Denver, Colorado 80274		23-7 1020		
36 OUNCES WIC APPROVED CEREAL 4 CANS 12 OZ FROZEN JUICE 3 GALLON(S) MILK (ANY WIC APPROVED) 2 POUND CHEESE (DOMESTIC, NO DELI) 1 DOZEN GRADE AA LARGE EGGS 1 JAR PEANUT BUTTER 18 OUNCE 26 OUNCE TUNA FISH (WATER PACKED)		FIRST DATE TO USE	LAST DATE TO USE			
		AUG/21/97	SEP/21/97			
		<b>ACTUAL</b>	<b>\$</b>	<b>VOID</b>		
		NAME OF ENDORSER				
<b>JUST PRACTICE!</b>						
SIGNATURE OF ENDORSER OR AUTHORIZED PROXY						
<small>ONLY ABOVE ITEMS MAY BE PURCHASED – CUSTOMARY PRICES MUST BE CHARGED                  RETAILERS MUST DEPOSIT WITHIN 60 DAYS OF FIRST DATE TO USE.</small>						

3. **Practice explaining the steps involved in using a WIC check in the store.** Have your trainer explain the process to you and then you role play the WIC staff and your trainer can role play a client.

Person who role-played with

you: \_\_\_\_\_

4. **Now you practice talking about the WIC Program!** After work, talk to friends or relatives about your new job. Tell them what WIC stands for and explain what kind of a program it is. Mention who is eligible, what criteria they must meet and what benefits the applicant receives.

- Write down some of the questions that people raised about the WIC Program here.



If you make this effort, you will be great at your new job! If the people you talk to ask questions you are unable to answer, write them down. You can probably find most of the answers in the *Colorado WIC Procedure Manual* or from fellow workers and respond to their questions later.

**LEARNING ACTIVITY - IIB**



**TOURING THE COLORADO WIC PROGRAM PROCEDURE MANUAL-  
Your Trekkers Guide To Survival With WIC**

The beginning hiker needs a variety of information to feel prepared when setting out on a new adventure. Particularly if they find themselves alone, it is comforting to know that they have their guide book for reference if needed. In the WIC Program, the *Colorado WIC Program Procedure Manual* will be your central source of information regarding state and federal policies and procedures for administering the Program. It is the most valuable tool a WIC staff member has for the proper operation of the WIC Program. The *Procedure Manual* contains detailed explanations of all aspects of the Program. This manual is updated annually so make sure you always use the most recent version.

So find a comfortable seat and open your manual with this next activity! Below are brief descriptions of each section. Follow along and flip through the pages with each sections.:



- I. Introduction - This section introduces you to the staff that make Colorado WIC possible. You will find a list of the state staff at the Colorado Department of Public Health and Environment who operate the WIC Program from a five story building (without a view of Pikes Peak!) in Denver, and also compiled is the local agency directory which lists staff names, positions and clinics around the state.
- II. General Information - This section provides a series of questions and answers about the WIC Program. Here you will learn who administers the Program, who is eligible for Program benefits, and which foods are provided to eligible participants.
- III. Federal Regulations - This section contains a copy of the federal rules and regulations which govern the operation of the WIC Program in all states. It may look like a challenging reading experience, but it does discuss Program fundamentals.
- IV. Program Policy Letters - This section contains all new policy statements that have been distributed by the State WIC Office to local agencies during the current year. Your agency must update this section throughout the year as policies are rewritten and distributed.
- V. Fiscal Administration - This section describes the financial record and reporting systems required of local WIC agencies by the State WIC Office.
- VI. Retailer Participation - This section provides necessary information about how the WIC Program coordinates with the grocery stores that accept WIC food instruments (checks). You will learn what the responsibilities of the state and local WIC Program are, as well as the duties of the retailer (grocer).
- VII. Eligibility Guidelines - This section describes the standards used to determine whether applicants are eligible for WIC Program benefits.
- VIII. Clinic Procedures - This section describes in detail how the WIC Program operates in Colorado. It provides instructions on daily clinic procedures including, enrolling applicants, selecting food packages, producing and using food instruments and scheduling and appointment policies and implementing the Breastpump Loan Program.

## Section II: Introduction to the WIC Program

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- IX. Nutrition Education - This section provides information about how nutrition education services are delivered to WIC participants and documented in the WIC records. It also contains a list of WIC's Breastfeeding Education Standards.
- X. Special Populations - This section describes the procedures for providing WIC benefits to populations needing special assistance such as homeless and migrant populations. If your agency serves a Spanish-speaking population, peruse this section to learn about special materials and teaching suggestions offered through the state office.
- XI. Monitoring - This section describes the procedures for evaluating local agency Program operation including Program management, nutritional assessment, education, civil rights compliance, accountability, and financial management. Directors, administrators and supervisors should read this section completely.
- XII. Fair Hearings - This section is a guide for local and state administrators on how to implement fair hearing procedures for WIC participants who feel they have been denied benefits or treated unfairly by the local WIC agency.
- XIII. Civil Rights - This section outlines the procedures for complying with the Civil Rights Act of 1964 and USDA Regulations regarding civil rights, including processing complaints, collecting ethnic/racial data, and reviewing local agency compliance.
- XIV. Legislation - This section provides information describing the process which affects the regulations and funding levels of the WIC Program bill.
- XV. Outreach/Referral/Substance Abuse Referral - This section describes techniques to promote and advertise the WIC Program to potential participants. The section also describes the role of the WIC Program in directing participants to other services in the community, as necessary.
- XVI. Local Staffing - This section outlines suggested job descriptions for each local agency WIC position. The section also includes an outline of the WIC Certification Program requirements.

**LEARNING ACTIVITY - IIC**



**USING THE WIC PROCEDURE MANUAL**

Answer the following questions using the WIC Procedure Manual and the hints as needed or indicated. Remember: the Index and Section tabs can guide you too.

1. What department administers the Program at the Federal level? (Hint: See Section II - General Information)
  
2. Discuss at least three ways the State role differs from the local agency (county) role in the administration of the WIC Program. (Hint: See Section II - General Information)  
-  
-  
-
3. What is the name of the retailer newsletter published by the State? (Hint: This has to do with Retailer Participation)
  
4. Your agency's caseload is decreasing and you are encouraged by the State Office to increase numbers. Where would you look for ideas on reaching more of the county's eligible population? (Hint: "Outreach" is the buzz word)
  
5. A participant requests an address at the State level where they can write to someone because they feel they have been unfairly removed from the WIC Program in your agency. Where would you look for the address in the Colorado WIC Procedure Manual? What is the address? (Hint: This has to do with requesting a fair hearing)
  
6. Where will you look in the Procedure Manual to find a copy of the steps to perform a retailer monitoring? (What section and page?) (Hint: This has to do with Retailer Participation)
  
7. What should a participant do if she/he cannot keep a WIC appointment? (Hint: This one you may think is common sense.)
  
8. Where will you look in the Procedure Manual to respond to a participant who believes she has been treated unfairly by the clinic staff because of ethnic differences? (Hint: This has to do with a Civil Rights complaint.)
  
9. Check the publication that is the primary source of information on policies and procedures for the WIC Program:  
  
\_\_\_\_ The WIC State Plan  
\_\_\_\_ The Colorado WIC Program Procedure Manual  
\_\_\_\_ The Colorado WIC News

## Section II: Introduction to the WIC Program

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10. Check all that apply. In order to be eligible for WIC, a person must:

- live in a WIC Program service area
- meet financial eligibility requirements
- be identified by a certified WIC authority to be at nutritional risk
- be in an eligible participant category

ANSWERS Check and learn how you did. Discuss any questions with your trainer.

1. The United States Department of Agriculture. At the State level it's the Department of Public Health and Environment that operates the Program. Find in Section II - General Information, under Questions and Answers about WIC.
2. State - approves applications from local agencies
  - administers Program and fiscal operations
  - develops and directs food delivery system
  - monitors operations, nutrition, and fiscal components
  - develops and coordinates nutrition education componentsLocal- Certifies participants as eligible
  - conducts medical and nutritional assessments
  - distributes checks to participants
  - keeps financial and administrative records
  - submits monthly financial reports to state
  - provides nutrition education program
  - monitors approved food retailersFind in Section II - General Information, Questions and Answers about WIC.
3. WIC's World (Section VI - Retailer Participation under State Agency Responsibilities).
4. Find in Section XV - Outreach/Coordination/Referral/Targeting.
5. Find in Section XII - Fair Hearing, under Procedures.  
Office of Health Care Services  
Colorado Department of Public Health and Environment  
4300 Cherry Creek Drive South  
Denver, CO 80246-1530
6. Find in Section VI - Retailer Participation under Retailer Monitoring Report
7. Recommending to all participants to call and reschedule if they cannot keep a WIC appointment is a gentle reminder. Calling to reschedule appointments is not always common sense.
8. Find in Section XIII - Civil Rights under Complaint Processing.
9. The Colorado WIC Program Procedure Manual. The one you are using to answer these questions.
10. Check all. Find in Section VII - Eligibility under Eligibility Requirements.

**Congratulations  
on completing this section.**

**Take a break.  
Picture the view from the mountains!**



### SECTION III: INTRODUCTION TO ELIGIBILITY REQUIREMENTS

Just because a novice hiker has two working legs does not necessarily mean they are equipped to hike Pikes Peak in a day. There are many things that make someone eligible for this type of a climb (e.g., adequate water, food, knowledge of the trail, good foot protection, etc). The same thoughts can be applied to the WIC Program. Even though we may know the eligibility criteria, there remains much more we must know to have the best outcomes when we do our job.

#### PERFORMANCE OBJECTIVES

Upon completing this section, you should be able to:

1. Discuss the four criteria for an applicant to be eligible for the WIC Program.
  2. Determine if an applicant is eligible, given certain criteria.
  3. Use the Colorado WIC Procedure Manual to find information when eligibility questions arise.
  4. Identify the minimum medical nutrition data required at a certification appointment.
  5. Explain to an endorser the certification periods for a WIC participant.
  6. Discuss *categorical ineligibility* to a participant.
  7. Describe the priority system and identify which priorities are at higher medical/nutrition risk.
  8. Find the procedures for proper processing standards for new applicants in the Colorado WIC Procedure Manual.
  9. Describe process for making someone ineligible.
  10. Define and discuss the other USDA-funded sister nutrition Program in Colorado. Identify the counties who host both these Programs.
-

**LEARNING ACTIVITY - IIIA**



**USING THE ELIGIBILITY GUIDELINES**

**Time for your "Second Wind"**

Practice Using the Eligibility Guidelines Section of the Procedure Manual. You are asked to handle the front desk in your clinic today. That means you will need to answer the phone and handle walk-in applicants and participants= questions. But don't worry, you have your Procedure Manual by your side and patient customers today. First skim Section VII on Eligibility in the Procedure Manual to learn what is in the pages. Refer to the manual to answer these questions:

1. You receive a call from a woman who is breastfeeding her 13 month old. She wants to know if she is eligible. Is the mom eligible? \_\_\_\_\_ The three classifications of women eligible for the WIC Program are:
  - 
  - 
  -
  
2. The Diaz family walks in wanting to know if they are eligible for the WIC Program. The family consists of Maria, who is pregnant, Mark, her husband, and their two children: Alfonzo, a 2 year old boy and Sophie a 5 year old girl. The family makes \$30,000 annually.
  - Would the family be income eligible for the WIC Program? (Use the income guidelines in the manual.)
  
  - Which members of the family may be categorically eligible?
  
3. Debbie Morgan calls. She is a single parent of a one month old baby. The baby was born prematurely and is being fed a special formula through a tube to receive extra calories. The mother works full time and makes \$1,850 a month. No one in the family receives Medicaid.
  - Would the family be income eligible for the WIC Program?
  
  - Which members of the family may be categorically eligible?
  
4. A client calls to learn if she is income eligible for WIC. She is concerned that she does not have pay check stubs to show you just how little money she has. She tells you that she receives Medicaid. Describe to her adjunctive eligibility.

### Section III: Introduction to Eligibility Requirements

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5. Your phone is ringing off the hook! A student doing a special school project on federal nutrition programs wants to know who of the following persons would be categorically ineligible for the WIC Program:
  - a. A five-year old boy
  - b. A six-year old girl
  - c. A seventeen-year old boy
  - d. A woman who is breastfeeding her 28 month old baby
  - e. A two-month old girl
6. An applicant who has an appointment tomorrow calls to find out if she needs proof of her pregnancy. What would be your response?
7. How would you respond to a woman who calls to tell you that she lives in the neighboring county but sees a doctor in your county and therefore wants to receive WIC services here? (Hint: She is requesting that you "extend your service area.")
8. A pregnant woman calls who is anxious about her first WIC appointment. She has heard and fears that WIC Agives shots.@ What would you tell her are the minimum medical nutrition data required at certification? (Hint: You want to look up the required medical/nutritional data for certification.)
9. A woman comes in for a visit with her infant who is 9 months old, and tells you she is no longer breastfeeding and would like more formula. The mother is no longer eligible for the WIC Pro-gram. Describe one of the procedures to document and notify her of her ineligibility. (Hint: This is a Notification procedure.)
10. What form, completed at certification by the WIC staff, documents the date when the partici-pant-s certification periods ends? (Hint: This is a Certification procedure that informs partici-pants of their rights and responsibilities.)
11. A client walks-in who has been receiving WIC services in Texas. She would like to continue to receive services in Colorado. On what pages of the Procedure Manual can you locate informa-tion on Transfer Policies? (Identify which year Procedure Manual you are referencing.)
12. The following individuals are coming on your WIC Program this week. What will you explain is the length of their certification period: (Hint: This is part of the "Initial Explanation of the WIC Program.")
  - a 2 month old baby
  - a 7 month old baby
  - a 14 month old child
  - a woman in her first month of pregnancy
  - a woman in her fourth month of pregnancy
  - a breastfeeding woman of a 1 month old baby
  - a breastfeeding woman of a 8 month old baby
  - a three month postpartum non-breastfeeding woman
13. True or false      The WIC agency is required to make one contact, either by telephone or mail to those pregnant women who miss their initial certification appointment. (Hint: This has to do with Providing WIC Services to Pregnant Women.)

### Section III: Introduction to Eligibility Requirements

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ANSWERS Check and learn how you did. Page numbers in answers may vary depending on the Procedure Manual year.

1. No, because she doesn't fit into any of the 3 categories:  
pregnant,  
breastfeeding women up to their baby's first birthday,  
non-breastfeeding women up to 6 months postpartum.  
(Find under Eligibility - Definitions of WIC Population)
2. Yes, they would be income eligible. Because Maria is pregnant, both she and the fetus count as members of the household. Maria and Alfonzo would be categorically eligible.  
(Find under Eligibility - Definitions of WIC Population and Financial Eligibility Criteria - DHHS Income Poverty Guidelines)
3. No, she is over income for her family size. Both mom and baby are categorically eligible but not income eligible and therefore would not qualify for WIC.  
(Find under Eligibility - Financial Eligibility Criteria - DHHS Income Poverty Guidelines and Definitions of WIC Population)
4. You explain that she is still eligible for WIC if she is on Medicaid. The WIC Program accepts Medicaid, Temporary Assistance for Needy Families (TANF), or Food Stamps as a proof of income or as financial eligibility for the WIC Program.  
(Find under Eligibility - Financial Eligibility Criteria - Adjunctive Income Eligibility)
5. a, b, c, and d are all categorically ineligible.  
(Find under Eligibility - Definitions of WIC Population - Categorical Eligibility)
6. Proof of pregnancy is not required by the WIC Program as a condition of eligibility.  
(Find under Eligibility - Definition of WIC Population - Proof of Pregnancy Not Required)
7. Verify with her that it would be more convenient to receive WIC services in your county. Contact the other agency where she lives and discuss the situation. If the arrangement is agreed upon by both agencies, fill out WIC Form #24 ARequest to Extend Local Agency WIC Service Area and proceed with the participant's request.  
(Find under Eligibility - Residential Eligibility - Extending a Service Area)
8. The WIC Program does not give shots however some programs work closely with immunization clinics and may offer immunizations during a WIC visit. At certification the minimum medical nutritional data required are height, weight, hematocrit or hemoglobin and a nutrition assessment.  
(Find under Eligibility - Certification Procedures - Required Medical/Nutritional Data)
9. After issuing her last checks, the participant's file should be marked ineligible. Document her ineligibility by either printing a Notification of Ineligibility form from the computer system or complete WIC Form #51, ANotification of Ineligibility/Denial of Services. Review the form with the woman and file it in her chart.  
(Find under Eligibility - Notification of Ineligibility)
10. Participant Documentation Form  
(Find under Eligibility - Certification Procedures - Participant Documentation Form and Responsibilities Agreement)

### Section III: Introduction to Eligibility Requirements

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11. 1998 Procedure Manual: Section VII, Eligibility Transfer Policy, pages 44-50  
(Page numbers may vary from year to year.)
12. - a 2 month old baby: until first birthday  
- a 7 month old baby: 6 months certification period  
- a 14 month old child: 6 months certification period  
- a woman in her first month of pregnancy: the duration of pregnancy & 6 wks postpartum  
- a woman in her fourth month of pregnancy: the duration of pregnancy & 6 wks postpartum  
- a breastfeeding woman of a 1 month old baby: for the period up to 6 months postpartum  
can be recertified if still breastfeeding at that time  
- a breastfeeding woman of a 8 month old baby: the duration of breastfeeding but no later  
than 1 year postpartum  
- a three month postpartum non-breastfeeding woman: for the period of up to 6 months  
postpartum  
(Find under Eligibility - Initial Explanation of the WIC Program. See "Length of WIC Eligibility.")
13. True  
(Find under Eligibility - Providing WIC Services to Pregnant Woman. See "Contacting Pregnant Women who miss Certification Appointments.")

### **LEARNING ACTIVITY - IIIB**

### **BECOMING FAMILIAR WITH THE WIC CLIENTS RIGHTS AND RESPONSIBILITIES**

Sometimes you have to sign a log when you head into a wilderness area. This verifies that you know your responsibilities as a hiker.  The Participant Documentation Form is a form that describes the WIC participant's rights and responsibilities. It is very important that they sign this form to indicate that they understand all the information on the form.

Read the participant documentation form on the following page. Ask your preceptor about any part that you do not understand. Sometimes forms with lots of writing intimidate people, so they choose to skim or not read them at all. Use a highlighter pen as you read the form to identify the key points. Summarize these points in your head so that you will be able to explain the information to the person who chooses not to read the form or has questions.

Observe and listen to WIC staff explaining the WIC Program to participants and asking them to sign this form. Note there are items listed in the box at the bottom to remind you of what to discuss.

The form is currently available in English and Spanish only. So you may need to explain the points to an interpreter for a person who speaks another language.

## Participant Documentation Form and Responsibilities Agreement for the Colorado WIC Program

Participant's Name \_\_\_\_\_

### Participant's Rights

- WIC does not discriminate. Discrimination covers race, color, national origin, sex, age, and disability. If I am discriminated against, I can write to the Secretary of Agriculture, Washington, D.C. 20250 and/or The Office of Civil Rights, USDA-FCS, 1244 Speer Blvd. #903, Denver, CO 80204.
- I may appeal any action which affects my WIC eligibility by asking for a fair hearing.
- I will learn about food and health. I may be referred to other health service offices.

### Participant's Responsibilities

- I know I will be receiving federal assistance. Program officials may verify information I have given. I know that if I don't tell the truth I may not get WIC checks or I may have to pay back money for WIC checks already cashed. I may also be prosecuted under state and federal law.
- I know it is important to keep WIC appointments. If I cannot make an appointment, I will call in advance to reschedule. If I fail to pick up checks two months in a row I know I may be removed from the Program.
- I will treat clinic staff and store employees with respect by voicing complaints politely with no verbal or physical abuse.
- When using checks, I will **not**: sell or return WIC foods for cash, change items on checks, get credit instead of WIC foods, cash checks reported lost or stolen, use a store not approved by WIC, get foods not listed on the check, or cash checks in the wrong month or on dates not listed as valid on the check.
- I will **not** attempt to get benefits from more than one WIC clinic at a time. I understand that one individual cannot get benefits from both WIC and the Commodity Supplemental Food Program (CSFP) at the same time. If I wrongly accept benefits from both programs, I may be asked to pay back money for the WIC checks already cashed.

### Statement of Agreement

I agree to the statements above and know that if they are not followed I may be taken off the Program. The financial and eligibility information I provided is true to the best of my knowledge. I understand when this certification period ends.

I understand that information collected by WIC which will make it easier for my family to receive other services may be shared with the following programs: Immunizations, Public Health Nursing, Well Child, EPSDT, Prenatal or Prenatal Plus, Family Planning, the Health Care Program for Children with Special Needs, the Migrant Health Program, or other WIC Programs.

I do \_\_\_\_\_ do not \_\_\_\_\_ consent to the release of information to my primary health care provider,  
who is \_\_\_\_\_.

Date Certification will end	Participant/Endorser Signature	Date

### FOR STAFF USE ONLY

Topics Covered for Initial Explanation of WIC\*

- |                               |                                  |                      |
|-------------------------------|----------------------------------|----------------------|
| Q Purpose/Function of WIC     | Q Length of Certification Period | Q VOC Card           |
| Q Qualifying NRFs             | Q Importance of Health Care      | Q Fair Hearing       |
| Q WIC Foods/Nutrients         | Q Missed Appointment Policy      | Q How to Cash Checks |
| Q Foods for Participants only |                                  |                      |
| Q Certification Class         | Q Video or Slide Show            |                      |

\*For Recertification: Explain qualifying NRFs and length of certification period. Clarify other topics as needed.

**LEARNING ACTIVITY - IIIC**



**CERTIFICATION PERIODS**

One area where staff often find themselves confused is with certification periods and termination (end of eligibility) dates. Read this next activity very carefully.

**Practical Application of Certification Periods**

The certification period is the time during which a participant is eligible to receive services. The *term* date is the day a participant comes off the Program. The following example illustrates certification periods for a child (a six month certification period) using WIC's computer system, ASPENS.

**A child, John, is certified on June 1:**

His certification period is June 1 to December 1 (6 months)

His term date is December 1.

**If John is recertified on November 20 (before his term date of December 1):**

His new certification period will be December 1 to June 1.

His term date is now June 1.

(The new certification period is for a 6 month period and immediately follows the previous certification period.)

**If John is not recertified until December 5 (after his term date of December 1):**

His new certification period is December 5 to June 5.

His term date is now June 5.

(John is not eligible to receive benefits for the time period between December 1 and December 5 since he was not certified for the Program during that period of time. The new certification period reflects exactly a 6 month time period.)

**Note:**

The computer system allows you to recertify participants up to 30 days before a participant's term date and 30 days past their term date.



**SELF CHECK**

Now try this one-

Marsha was certified on the Program when she was two months old (November 14). Her term date is her first birthday, September 12.

Answer the following:

If Marsha is recertified on August 31, when will be her next term date?

If Marsha came in to be recertified on September 27, when will be her next term date?

---

**ANSWERS** Check and learn how you did.

- If Marsha is recertified on August 31 (before her term date of September 12), her next term date is March 12
- If Marsha is recertified on September 27 (after her term date of September 12), her next term date is March 27

**LEARNING ACTIVITY - IIID**



**APPLYING THE PRIORITY SYSTEM**

By now you may understand that women, infants and children on the WIC Program all have some nutrition concerns that qualify them on the WIC Program. These are Nutrition Risk Factors (NRFs).

Go to the Eligibility Section of the Procedure Manual, Appendix A - Nutrition Risk Factors. Note Appendix A lists and provides brief explanations of all the possible nutrition risk factors for each category of WIC applicants (e.g., pregnant women, breastfeeding women, infants, etc.). Familiarize yourself with the risk factors. Glance at the different risk factors. For practice, try to learn if you (if you were ever pregnant), your child, or a friend might have a risk factor that would potentially qualify them for WIC.

Unfortunately, there are times when changes in WIC funding affect who your Program can serve. Funding for the WIC Program is determined through a yearly budget process. If funding is adequate, all eligible people can participate on WIC. However, if funds are tightened or cut, some otherwise eligible people cannot be put on the Program.

There is a system to follow to know who can participate immediately and who must be placed on a waiting list. It is a "Priority System." In WIC there are six priorities (1-6); Priority 1 being the highest, and Priority 6 the lowest. When WIC clinics must cut back on who they serve, it is the Priority 6 people who are first put on a waiting list.

Now look at Appendix A: Nutrition Risk Factors again. You will note to the left of the nutrition risk factor definition is a column that lists the corresponding priority.



**SELF CHECK**

Refer to Appendix A: Nutrition Risk Factors to complete this activity.

List the letters of each WIC participant beside the corresponding Priority.

Priority 1 _____	Priority 2 _____
Priority 3 _____	Priority 4 _____
Priority 5 _____	Priority 6 _____

- A. Pregnant woman who smokes 1 cigarette/day.
- B. Postpartum non-breastfeeding 15-year-old woman.
- C. Healthy one-month-old whose mother was on WIC during her pregnancy.
- D. Child with a hematocrit of 30%.
- E. Breastfeeding woman with twins.
- F. Postpartum, non-breastfeeding woman who has a BMI of 27.2.
- G. Pregnant woman who doesn't eat dairy products, but is otherwise healthy.
- H. Infant with a length-for-age less than or equal to the 5th percentile.
- I. 17-year-old pregnant woman.
- J. 2-year-old child who takes a bottle to bed.
- K. 3-year-old child with cystic fibrosis.

How did you do?

---

**ANSWERS**

Priority 1 A, E, H, I

Priority 3 D, K

Priority 5 J

Priority 2 C

Priority 4 B, G

Priority 6 F

- A. Pregnant woman who smokes 1 cigarette/day.
- B. Postpartum non-breastfeeding 15-year-old woman.
- C. Healthy one-month-old whose mother was on WIC during her pregnancy.
- D. Child with a hematocrit of 30%.
- E. Breastfeeding woman with twins.
- F. Postpartum, non-breastfeeding woman who has a BMI of 27.2.
- G. Pregnant woman who doesn't eat dairy products, but is otherwise healthy.
- H. Infant with a length-for-age less than or equal to the 5th percentile.
- I. 17-year-old pregnant woman.
- J. 2-year-old child who takes a bottle to bed.
- K. 3-year-old child with cystic fibrosis.

**LEARNING ACTIVITY - IIIE**



**NUTRITION ASSESSMENT TOOLS**

We assess mountain climbing success on physical things like breathing, heart rate, and lack of pain. In WIC, we assess nutritional status using several tools. They are described below.

WIC Nutrition Assessment Tools

To assess or measure a person's nutritional status in WIC we collect four types of information: 1) general health and nutrition information, 2) dietary, 3) hematological or blood-related, and 4) anthropometric or body measurements. We gather this information from the participant in a variety of ways including an interview, a nutrition questionnaire, a dietary screening tool and by taking the client's measurements. Below is a brief description of some of these screening tools.

**Nutrition Questionnaires**

The nutrition questionnaire is a series of questions designed to discover an individual's eating habits as well as medical conditions which may affect the client's eating or nutritional status. Sometimes clients will write important information they may otherwise not share with you in conversation. Learn where copies of these questionnaires are in your clinic. There are four nutrition questionnaires: Pregnant Woman, Breastfeeding/Postpartum Woman, Infant (Birth to 5 months), Infant (6-12 months) and Child. The nutrition questionnaire forms are available in English and Spanish.

Understanding the forms:

Collect one of each of the nutrition questionnaires. Skim down through the questions. After the individual participant information at the top, note that there are questions where the participant will circle responses as *Yes* or *No* in the next two columns. Any response circled in the right-hand column (may be a *Yes* or a *No*) suggests a potential risk factor. The column on the far right-hand side of the form lists the nutrition risk factors (NRFs). By identifying NRFs on this form, you will know which risk factors to add to the group of risk factors to discuss with the client and which to add to the computer. (Circle the risk factors that apply.)

In Learning Activity IIID, you became familiar with the tables of Nutrition Risk Factors. Note the column titled AO/S@ of each table. AO@ means Objective. This means that once you enter related information into the computer, the computer will automatically enter the risk factor code. For example, if you enter a woman's birth date and the computer calculates her age as 15 years, she will automatically be risked with NRF 40 (age less than 16 years old at the time of conception). On the other hand, the NRFs with an AS@ beside them are not picked up by the computer. AS@ means Subjective. Subjective risks must be added to the computer--you tell the computer that this is an additional risk factor.

Circling the NRF listed on the far right-hand corner of the nutrition questionnaire as they apply for a participant, serves as reminder to enter the subjective risks into the computer. It is important to add all of the identified subjective risk factors.

### **Weight and Height/Length Monitoring Tools**

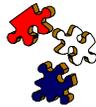
The other part of assessing nutritional status is to weigh and measure clients and record the results on different grids and graphs. There is a weight gain grid used for pregnant women and weight and length/height monitoring graphs for boys and girls. Find out where these grids and graphs are kept in your clinic. You will learn more about weighing, measuring and monitoring in the Screening Module.

### **Diet Assessment Tools**

The tools used in the WIC clinic to assess participants' diets include forms which collect either a *Dietary Recall* or a *Food Frequency*. The dietary recall is a screening tool on which an individual is asked to record everything they ate and drank for a 24-hour period. An evaluation of this tool allows you to determine if the foods and beverages consumed on that day were adequate in nutrients. It also helps to give an indication as to the pattern of meals and snacks.

Some agencies use a food frequency tool. This tool helps determine food intake over an extended period of time. It has two parts: a list of foods and a scale for checking frequency of use. You will learn more about how to use these tools in the Diet Screening Module. Learn where copies of the form your clinic uses are located.

### **REINFORCEMENT ACTIVITY**



#### Observing in the Clinic

Now, observe in the clinic. Watch someone being enrolled. Jot down your observations and answer the following questions:

1. What questions are asked to determine eligibility? What forms are used?
2. What measurements are taken?
3. Are all applicants on this day eligible for WIC services? If not, why not?
4. What does the staff person tell the new enrollee about why she/he is eligible?
5. When and how does the staff person explain the participant's nutrition risk factor(s)?

Good Work!

Make sure to take a break!  
Imagine relaxing by the creek side . . .



## **SECTION IV: ORIENTATION TO WIC CLINIC PROCEDURES**

We all know that the State WIC Procedure Manual is huge! Twenty pound manuals are a "given" with WIC Programs nationwide. What you may not realize is that in some ways the procedure manual is a "lifesaver." The procedures mapped out in the manual streamline and standardize many of the processes that you will deal with daily in WIC.

Imagine if your hiking map falls out of your pocket while you are far into your hike and the trail is not well marked. You would hopefully find your way but you might encounter some problems along the way (e.g., you may end up getting lost for awhile and use up valuable daylight hours).

The WIC procedures may seem excessive, but in the long run, they may help you save time and are necessary for the Program's survival. The standard operating procedures enable states to report to their primary funding source (USDA) on what and how services are provided.

### **PERFORMANCE OBJECTIVES**

Upon completing this section, the trainee should be able to:

1. Identify when a WIC check may be issued to a proxy.
  2. Identify the key procedures for issuing low-iron fortified formulas.
  3. Encourage the use of contract formulas whenever possible and discuss why it is important to issue contract rather than non-contract formulas.
  4. Locate the correct procedures to follow for clients who report lost or stolen checks.
  5. Respond to the occurrence of a client cashing postdated checks.
  6. Locate information on providing breast pumps through the WIC Program in the Procedure Manual.
  7. Discuss the differences between the participant master record and education record.
-

**LEARNING ACTIVITIES - IVA**



**USING THE CLINIC PROCEDURES SECTION OF THE PROCEDURE MANUAL**

**ACTIVITY I**

Hikers need to be prepared. One part of preparation is finding the correct map for the trail and knowing how to read the map; after all, there are topographic, aerial photographs, geologic, and other types of maps. A map that one doesn't know how to read is useless.

**Familiarizing Yourself with WIC Clinic Procedures**

The Clinic Procedures (Section VIII) in the WIC Procedure Manual is a "map" that you will use often in WIC. The activities in this section of the Orientation Manual will have you reading and using some WIC clinic procedures.

Skim the WIC Procedure Manual Section VIII, Clinic Procedures. The main subjects of this section are:

- **Enrollment Procedures**: Steps for processing a participant using the computer system (also be covered in the New Employee Training held at the State WIC Office).
- **WIC Food Packages**: Explanations of the food packages (also covered in the Food Package Module).
- **Food Instrument Issuance**: Procedures for issuing checks (food instruments), the WIC Check Envelope, cashing checks, and using proxies.
- **WIC Allowable Foods**.
- **Proxy Procedures**.
- **Food Delivery**: Procedures for dealing with lost or stolen checks.
- **Scheduling and Missed Appointment Policy**.
- **Administrative Functions and Reports**: General information on WIC records and reports.
- **Security**: Security maintenance of agency automated systems.

The Appendices at the back of this section are a useful reference when dealing with the following procedures:

- ◆ Appendix A: Guidelines for the use of low-iron formula
- ◆ Appendix B: Procedures and Policies for use of milk- and soy-based contract, non-contract formulas, and special/metabolic formulas and nutrition products
- ◆ Appendix C: Food package tailoring and documentation
- ◆ Appendix D: Prevention and management of WIC Program Misuse
- ◆ Appendix E: Breastfeeding Pumps/Aids

**ACTIVITY II**

**Use the Procedure Manual to Respond to Questions**

Reference the Clinic Procedures Section to correctly answer the following questions. Use the Procedure Manual index when necessary. Compare your answers with those on the next page:

1. True or false (Hint: This is the Proxy Procedure)

If a participant cannot pick up checks because of illness, impending delivery, hospitalization, or sudden emergency she/he may designate a proxy to pick up the checks.

Section IV: Orientation to WIC Clinic Procedures

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2. Your clinic is closed because the entire community is snowed in. Where would you find regulations and procedures on mailing checks? List the page number and the Procedure Manual's Year. (Hint: You are looking for a procedure on mailing food instruments)
  
3. A participant comes in and tells you she lost her checks. Where would you find the procedures for responding to this? List the page number and the Procedure Manual's Year. What report needs to be completed? (Hint: You need a procedure on Lost or Stolen Food Instruments)
  
4. You are uncertain what the regulations are regarding issuing low fat food packages to an 18 month old participant. Where would you locate the information in the Procedure Manual? List the page number and the Procedure Manual's Year. (You will learn more about food packages in the Food Package Module.) (Hint: You are looking for Food Package Guidelines)
  
5. What might you say to a mother who requests a non-contract, milk-based formula for her one month old daughter? The only reason she gives for using this formula is that her daughter has been drinking this formula since birth. (Hint: Look up "Formula - Contract Formula" in index. Go to the page and read about the difference between contract and non-contract. Then, locate Appendix B - Use of Milk- and Soy-Based Contract and Non- Contract Formula." Read Appendix B.)
  
6. Your agency is interested in purchasing breastfeeding aids to help breastfeeding mothers. Which of the following are allowable aids: (Hint: Look up "Breastfeeding Pumps and Aids" in index)  

<input type="checkbox"/> manual breast pumps	<input type="checkbox"/> breast shells
<input type="checkbox"/> nursing pads	<input type="checkbox"/> topical creams
<input type="checkbox"/> breast shields	<input type="checkbox"/> electrical breast pumps
  
7. You receive a State report informing you that one of your clients cashed a check before its first date to use (i.e., postdated). This is a form of Program abuse. Where would you find the information to respond to this situation? List the page number and the Procedure Manual's Year. (Hint: Look up "Abuses" in index. When you locate the pages in the Procedure Manual, find the Appendix that outlines Endorser Misuse and Consequences)
  
8. Each participant on WIC will have a Master Record Report. This is a management report that the computer system will generate. How often should the Participant Master Record Report be printed? (Hint: Look under "Reports" in the index)

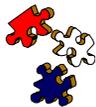
## Section IV: Orientation to WIC Clinic Procedures

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9. Each participant on WIC will also have records on the computer system of the nutrition education and counseling they received. These records are a management report known as "Participant Education Records." How often should the Participant Education Record be printed? (Hint: Look under "Reports" in the index)
  10. You are uncertain what the regulations are regarding issuing low-iron formula to a 4-month-old baby. What diagnosis would permit WIC's issuance of low-iron formula? (Hint: Read through all of Appendix A in the Clinic Procedures Section)
- 

### **ANSWERS Check and learn how you did. Page numbers may vary depending on the Procedure Manual year.**

1. True (Find under Clinic Procedures - Proxy Procedures)
2. Clinic Procedures AFood Instrument Issuance@ Mailing Food Instruments, Procedure Manual FY'98, page 44 (page numbers may vary from year to year)
3. Clinic Procedures Food Delivery- Lost or Stolen Food Instrument Report Procedure Manual FY'98, pages 62-64 (page numbers may vary from year to year) Lost or Stolen Food Instrument Report Form
4. Food Packages - Guidelines. Look under "Food Package Information@ - Children. Procedure Manual FY'98, page 33 (page numbers may vary from year to year)
5. You might explain that WIC currently provides (Brand) milk-based formula. Explain that if she gradually transitions from her brand to WIC's brand, her baby will most likely do very well as the composition of these two formulas is very similar. (Discuss how to describe transitioning formulas with your supervisor or trainer.)
6. Manual pumps, breast shells, and electric breast pumps
7. Endorser Misuse and Consequences Misuse Category V, Procedure Manual FY'98, page 145 (page numbers may vary from year to year)
8. Once per certification/recertification Find under Clinic Procedures, ACaseload and Management Reports.@ Procedure Manual FY'98, page 79 (page numbers may vary from year to year)
9. Printing varies by agency. Contact your trainer to learn if these are printed in your agency. Find under Clinic Procedures, "Caseload and Management Reports." Procedure Manual FY'98, page 79 (page numbers may vary from year to year)
10. Diagnoses include hemolytic anemia, iron overload secondary to chronic blood transfusions, or inherited blood disorders.



### **REINFORCEMENT ACTIVITY**

Practice Implementing Clinic Procedures. Role play the following with your trainer:

- Explain WIC's policy on contract formulas to a mother requesting a non-contract formula for her baby. The mother does not describe any medical need for the non-contract formula. Expand on how to transition to a different formula.  
Person who role played with

you: \_\_\_\_\_

### **SKILL ASSESSMENT**

Explain to a co-worker how you will respond to a request for a non-contract formula to make sure you are comfortable with the topic.

You are doing great!!

Take a minute to enjoy yourself.





Now, look at the keyboard. The computer keyboard is similar to a typewriter keyboard (note Tab key, Backspace key, and Typing keys) and has some additional keys that are used to give the computer instructions. Some keys you will use are:

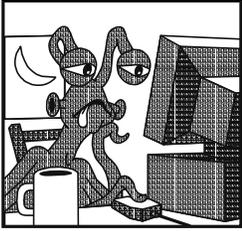
- ◆ Function keys: Used to do particular tasks such as F2-- moves you from one screen to the next and F10 takes you back through the screens.
- ◆ Cursor movement keys: Used to position the cursor on the display screen.
- ◆ Numeric keypad: Use digit keys 0-9 when *Num Lock* is on.

Check off the following as you locate them on your keyboard:

- \_\_\_ Tab key
- \_\_\_ Page Up and Page Down keys
- \_\_\_ Num Lock (numbers lock) key
- \_\_\_ F2, F5, and F10 keys
- \_\_\_ Backspace key
- \_\_\_ Enter key

**ACTIVITY II**

Familiarizing Yourself with Terms



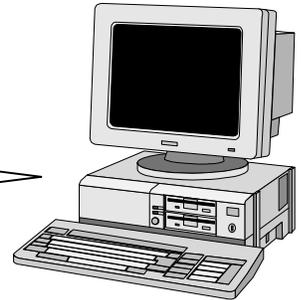
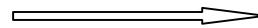
Sometimes you will need to call the WIC Help Desk to troubleshoot. You will probably feel more confident if you know some basic computer terms. Familiarity with these terms will be useful in the New Employee Training too.

Read through and think about the following terms you should know:

**TERMS YOU SHOULD KNOW TO USE ASPENS**

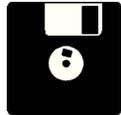
**ASPENS:** Automated Systems Project for Enhanced Nutrition Services

**Central Processing Unit (CPU):** "The brains of the computer"



**Cursor Movement Keys:** The keyboard keys used to position the cursor on the display screen.

**Disk:** A form of magnetic recording media used for storing information.



**Disk Drive:** A device used to read data or information from a disk onto a computer memory for processing or from a computer memory onto a disk for storage.

**Download/Upload:** To transfer information between a local agency PC and the State mainframe computer.

**Field:** A predetermined set of spaces for entry of specific data (i.e., a person's age is entered in a field that allows up to two digits to be entered).

**File:** An organized collection of related data records.

**File Server:** A computer that stores information from all other personal computers in a clinic.

**Food Instrument:** Same as check or food voucher.

**Function Keys:** Keys on a computer that do particular tasks such as moving from one screen to the next.

**Hardware:** The physical equipment (monitor, keyboard, CPU, and printer) that comprises your computer system.

**LAN (Local Area Network):** Links computers within one clinic to share information.

**Laptop:** A small, portable computer.

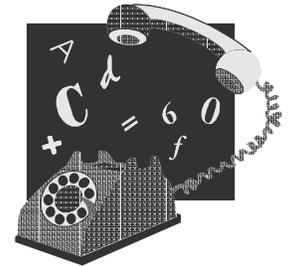
**Mainframe Computer:** The largest type of computer - State's computer.

**Master Workstation:** A designated workstation that is used for both daily operations and the uploading/downloading of data to/from the State Office.

**Memory:** Storage facility of the computer.

**Menu:** A computer screen that lists the options available to the user.

**Modem:** Device used to translate the output of a computer into signals that can be transferred over a telephone line.



**Numeric Keypad:** An input device on the keyboard that uses a set of decimal digit keys 0-9 and Special Function Keys.

**PC:** Personal computer which consists of the monitor, CPU, and keyboard.

**Password:** A security measure to limit computer use to specific users. Each employee will have a different password.

**Pop-up Box:** An information box that is available to assist the user in completing a field. The pop-up box lists the appropriate codes for a field.

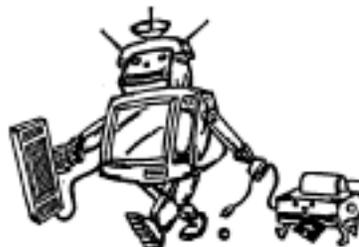
**Printer:** Main output device used to obtain a printed copy of your work (i.e., food instruments and reports).

**Sign-On:** Identifies each user so they can gain access to the system.

**Sign-Off:** Ends a computer session for a user (signing off of the computer).

**Software:** The programs of instructions that tell the computer what to do.

**Stand Alone Unit:** A self-contained workstation with all the equipment and processing power needed to function independently.



**Uninterruptable power supply (UPS):** A battery operated device that supplies a computer with electricity in the event of a power surge or blackout.

**Upload/Download:** To transfer information between a local agency PC and the State mainframe computer.

**User ID:** A five digit field that identifies the user.

---

ACTIVITY III

Knowing How Information is Transferred

The following diagram provides a visual description of how information is passed from the WIC clinic computer system to the State's computer system. Data is downloaded/uploaded between the State and local clinics via the modem.

-----  
Ask your supervisor or trainer how often this information is transferred in your clinic,  
e.g., daily, weekly, etc. and how the clinic prepares for this process.  
Write in the space below what you learned.  
-----

ACTIVITY IV

Understanding Your Clinic-s Set Up

There are three different configurations (arrangements) in which computers are used in the WIC Clinics. The type of scheme used is related to the number of employees at a location and the frequency of clinics. The following pictures depict these configurations.

Put an X by the configuration which is similar to the type you will most likely use in your clinic(s)?



**LEARNING ACTIVITY - VB**

USING THE ASPENS *Clinic Users Procedure Manual*

Most hikers don't radio the Rescue Team when mishaps occur. They usually have a hikers' guide as a familiar friend. In WIC, the ASPENS system has an accompanying manual to help you.

For many issues using ASPENS you will need to call the help desk for assistance. However, there will be times when the help desk answering machine takes your message and you may need an immediate response. The help desk will respond to your need as soon as possible. In the meantime, you have a reference available in your clinic-- the Clinic Users Procedure Manual where some of the answers can be found. The manual describes the procedures for doing all ASPENS system activities.

Locate your clinic's copy of the Manual.

At first glance this manual may appear intimidating, sort of like reading legal language if that's not your expertise. Fortunately, the manual can be easily demystified if you understand the numbering system for the pages and read the explanations slowly. The following activity will explain the manual's paging system and give you an opportunity to find answers to frequently asked questions.

Note the tabs that are used to divide each section. Each section heading is listed with a roman numeral, such as section I is Introduction, II is General Screen Flow, etc. This roman numeral is carried to the bottom of every page in that section and the section heading is in the upper right hand corner.

In each section are subsection topics. These topics are written under the section heading in the upper right-hand corner of the page. This subsection has a number identified with it and it follows the section heading. For example:

Page in Subsection  
Subsection page  
Section heading

<u>Now lets use the manual:</u>
1.) What is Section III?
2.) You want to learn how to recertify a woman who is now breastfeeding her newborn. You want to change a woman's category from pregnant to breastfeeding. Use the index and find the page that describes the procedure. What is the section heading, the subsection heading and what page is it on?

---

1-Participant Activities

2-Participant Activities, Other activities: Change in Pregnant/Postpartum Categories, page number will vary on manual date (through 1997—pages 5-7)

---

II. 1. 3

ANSWERS

**SELF CHECK ON ASPENS**

Using the glossary of terms and the brief computer discussion, respond to these questions:

1. Which of the following best describes the term Downloading?
    - a. Bringing a local agency's data system onto the ASPENS system.
    - b. The transfer of information from the state mainframe computer to a local agency computer system.
    - c. The transfer of information from a local agency PC to the state mainframe computer.
    - d. The transfer of information to and from the State Office and to and from the local agency.
  
  2. What is a food instrument?
    - a. WIC Check
    - b. Fork
    - c. Food voucher
    - d. a & c
  
  3. What will you use to enter data into your computer?
    - a. Monitor
    - b. Keyboard
    - c. Printer
    - d. Disk
  
  4. What best describes the term Uploading?
    - a. Bringing a local agency's data system onto the ASPENS system.
    - b. The transfer of information from the state mainframe computer to a local agency computer system.
    - c. The transfer of information from a local agency PC to the state mainframe computer.
    - d. The transfer of information to and from the State Office and to and from the local agency.
  
  5. List the type of configuration you will use in your clinic
  
  6. A pregnant woman is seeing you today for a follow up visit and she tells you that her estimated date of delivery has changed. You need to make the change in ASPENS but are unsure how. Where will you look in the Clinic Users Procedure Manual to find out how to update a pregnant woman's estimated date of delivery.
-

ANSWERS

1. b
2. d
3. b
4. c
5. (Have your trainer check this one.)
6. Section III Participant Activities, Subsection Other Activities: Update Estimated Date of Delivery Procedure manual through 1997 Pages III.6.2-III.6.4

**CONTRATULATIONS!  
YOU FINISHED!**

ORIENTATION MANUAL QUIZ

Name \_\_\_\_\_  
Date \_\_\_\_\_  
Agency \_\_\_\_\_  
Grade \_\_\_\_\_



Now you have the opportunity to incorporate what you learned!! Imagine that it is your first day to begin answering the phone and seeing clients by yourself. You have several appointments. Read the following questions and answer the corresponding questions. Make sure to use reference manuals to help you along the way.

#1 Today is April 20 and your 9:00 appointment is here. It is Paula Ortiz with her two year old daughter, Josie. Josie is here to be recertified. Her last certification period was October 26 of last year through April 26 of this year. You collect the following information from discussion and dietary review:

- ! There are 5 people in the household
- ! Paula's husband makes \$2,000/month
- ! Paula tells you that she inherited \$1,000 last month from her great Aunt who just passed away.
- ! You learn that Josie's height, weight, and weight for height are all on the 50th percentile and her hematocrit is 33%. (She lives at 6,000 feet.)
- ! You also learn that Josie has been diagnosed by her physician as lactose intolerant and refuses to drink milk. Her mom is willing to try Lactose-Reduced milk with her.

Answer the following questions:

- A. Is the family income eligible? Yes\_\_\_\_ No\_\_\_\_ Why? or Why not?
- B. What form will you go over with Paula to discuss her rights and responsibilities?  
\_\_\_\_\_
- C. What form would you have Paula fill out about Josie to learn about health and nutrition-related information?  
\_\_\_\_\_
- D. From the above information, what priority is Josie?\_\_\_\_\_
- E. From the information above, list one nutrition risk factor that may qualify Josie? (Name and code)  
\_\_\_\_\_
- F. What tailoring option will you consider with Paula as you select a food package for Josie?  
\_\_\_\_\_
- G. Once Josie is recertified today, what will her new certification period be?  
\_\_\_\_\_
- H. How long is Josie's certification period?\_\_\_\_\_

#2 The phone rings, it is someone wanting information about the WIC Program. Which of the following are correct? (Check all that apply.)

WIC is:

- \_\_\_\_\_ a.) a special supplemental nutrition program
- \_\_\_\_\_ b.) designed to supply all of the nutrients that a person needs
- \_\_\_\_\_ c.) for all people on Medicaid
- \_\_\_\_\_ d.) for pregnant women
- \_\_\_\_\_ e.) for breastfeeding women for as long as they breastfeed
- \_\_\_\_\_ f.) for infants and children up through the month of their fifth birthday
- \_\_\_\_\_ g.) a federally funded program
- \_\_\_\_\_ h.) directed by the Department of Health and Human Services

#3 Your 10:00 appointment arrives. It is Pamela Rhodes, a foster mother with a foster baby (a 3 month old) and her own two children (an 18 month old and a 3 year old). Pamela tells you she applied for WIC for her own children last year but was over income. The appointment today is to put the foster child on the program. She shares the above information:

- ! She receives \$300 a month from social services to care for the foster baby.
- ! Her two children and husband live with her.
- ! Her husband makes a gross amount of \$600 a week.

Answer the following question:

1. Is the foster baby income eligible for WIC? Yes\_\_\_\_\_ No\_\_\_\_\_
2. What is the amount of income you used to calculate if the foster baby was eligible?  
\_\_\_\_\_
3. What is the family size you used to calculate if the foster baby was income eligible?  
\_\_\_\_\_
4. Is the foster baby categorically eligible? Yes\_\_\_\_\_ No \_\_\_\_\_

#4 Judy Fry comes in with her newborn. Both Judy and her baby are to be certified today. Judy is breastfeeding her baby.

Which of the following information is required for enrolling Judy? (Check all that apply):

- \_\_\_\_\_ a.) Height
- \_\_\_\_\_ b.) Weight
- \_\_\_\_\_ c.) Blood Pressure
- \_\_\_\_\_ d.) Hematocrit or Hemoglobin
- \_\_\_\_\_ e.) Nutrition Questionnaire

Which of the following information is required for enrolling the baby? (Check all that apply):

- \_\_\_\_\_ a.) Height
  - \_\_\_\_\_ b.) Weight
  - \_\_\_\_\_ c.) Blood Pressure
  - \_\_\_\_\_ d.) Hematocrit or Hemoglobin
  - \_\_\_\_\_ e.) Nutrition Questionnaire
-

#5 What is the maximum amount of time you have to complete the modules in Level I, Level II, and Level III in order to become a Certified WIC Authority?

Level I \_\_\_\_\_ Level II \_\_\_\_\_ Level III \_\_\_\_\_

#6 Match the priorities with the participant classes:

Priority 1 \_\_\_\_\_  
Priority 2 \_\_\_\_\_  
Priority 3 \_\_\_\_\_  
Priority 4 \_\_\_\_\_  
Priority 5 \_\_\_\_\_  
Priority 6 \_\_\_\_\_

- a. Children demonstrating nutritional risk because of an inadequate nutritional intake.
- b. Infants (up to 6 months of age) born to a WIC participant or to a mother who was in medical/nutritional risk during pregnancy.
- c. Postpartum women 19 years and older at nutritional risk.
- d. Pregnant women, breastfeeding women, and infants demonstrating nutritional risk because of an inadequate nutritional intake.
- e. Pregnant women, breastfeeding women, and infants demonstrating nutritional risk by hematological or anthropometrical measures or other documented medical conditions.
- f. Children demonstrating nutritional risk by hematological or anthropometrical measures or other documented medical conditions.

#7. Which publication is the primary source of information on policies and procedures for the WIC Program?

- a. The Orientation Manual
- b. The Colorado WIC Program Procedure Manual
- c. The Colorado WIC News
- d. The WIC State Plan

## CONGRATULATIONS YOU HAVE REACHED THE SUMMIT AND COMPLETED THE ORIENTATION MANUAL!

Please hand in your entire manual to your supervisor for grading. They will check through your manual and may discuss or review with you some of your learning experiences. Once you have met with them, you may have it back to keep as a reference.



The first leg of your journey through the certification program is completed!



# SUPERVISOR'S CHECK LIST

(REMOVE THIS SHEET AND GIVE IT TO YOUR SUPERVISOR)

Dear Supervisor,

The learning experiences in the Orientation Manual are primarily hands-on. There are some activities that require the new employee to share their learning with you or a trainer. Someone in the clinic should be available to demonstrate techniques and skills. Please inform the trainee with whom you would like them to work. Additionally, until the trainer becomes a Certified WIC Authority, that is, completes Level I, a CWA must review and initial the trainee's work with WIC participants. (See Colorado WIC Procedure Manual, Clinic Procedures Section, page 2 for more information.)

When the new employee completes the manual they are to return their manual to you. The quiz should be treated like other quizzes in the certification program. Agencies who send quizzes to the State Nutrition Consultant for grading should forward this quiz as well. Agencies who grade their own quizzes will need to request the answer key for this manual from their State Nutrition Consultant.

Please take a moment to review the trainee's completed manual. Check that the activities were accomplished in each section. Read through the list below and check off the section they completed. If any of the activities were not completed, return the manual to them to review. It is recommended that staff keep their Orientation Manual for future reference.

## Section I--Welcome to the Certification Program

Reinforcement Activities, page 5

1. Check page 5- Are there check marks to indicate that the staff located a copy of each resource?
2. Is the publication, *Colorado WIC News*, written in?
3. Make sure you received a copy of the new employee's Plan for Learning. Please note you will need to complete the following three evaluation tools in order for the trainee to finish the Certification Program:
  - Observation Checklist
  - Chart Audit
  - Nutrition Education Evaluation Tool

## Section II-- Introduction to the WIC Program

Reinforcement Activities, pages 13-15  
Check and discuss experiences listed.

## Section III--Introduction to Eligibility Requirements

Learning Activity IIIB- Check page 26 to see that staff highlighted key points on the Participant Documentation Form  
Reinforcement Activities, page 31  
Check and discuss observations listed.

## Section IV--Orientation to WIC Procedures

Reinforcement Activities, page 36  
Check to learn if a staff member listened to the new employee describe the use of WIC contract formulas. Ask them to explain it to you.

## Section V-- Introduction to ASPENS

Learning Activity IV, page 43  
Check to learn if the employee identified the correct configuration(s) which they will use in WIC.  
Self-Check, page 45. Check that ASPENS self-check was completed.

## Manual Quiz

Collect quiz and grade or send to State Consultant for grading.