

Connecticut Local Agency Nutrition Services Clinic Observation Tool-2016

This tool was developed for use with all types of WIC appointments. All sections may not apply to all appointments. The gray shaded areas should be used for certifications, re-certification and mid-certification appointments. The light-yellow shaded areas can be used for all appointments and participant categories.

Local Agency staff:

Local agency/Site:

Reviewer:

Date:

Appointment and Participant Description	
Appointment type	<input type="checkbox"/> Initial Certification <input type="checkbox"/> Re-certification <input type="checkbox"/> Mid-Cert <input type="checkbox"/> High risk <input type="checkbox"/> Second NE contact(s) <input type="checkbox"/> Other _____
Participant Category (Check main, circle sub-category)	<input type="checkbox"/> Pregnant (PG) <input type="checkbox"/> Breastfeeding (BE, BP) <input type="checkbox"/> Postpartum (NP) <input type="checkbox"/> Infant (IBE, IBP, IFF) <input type="checkbox"/> Child (C1, C2, C3, C4)
Time scheduled:	Time in clinic:
Participant or Family ID #:	
Customer Service	Time
<input type="checkbox"/> Participant greeted by receptionist or other clinic staff <input type="checkbox"/> If paperwork/forms are required, staff explains to participant (see next section) <input type="checkbox"/> Participant is notified of expected wait time (as appropriate) <input type="checkbox"/> Participant is informed that nutrition education is an integral part of the WIC Program and is offered at every visit Notes:	
Income, Residency and Identity	Time:
<input type="checkbox"/> Income is checked and documented (Adjunctive income eligibility is verified) <input type="checkbox"/> Residency is checked and documented <input type="checkbox"/> Physical presence requirement is followed <input type="checkbox"/> Separation of duties is observed <input type="checkbox"/> Appropriate use of Self-Declaration Form(s) is observed <input type="checkbox"/> WIC Participant Rights and Responsibilities Form is explained to participant, document is e-signed and copy is provided to participant <input type="checkbox"/> Applicant/Participant Authorization is completed and scanned into CT-WIC as appropriate <input type="checkbox"/> Caretaker Form is provided, completed and scanned. Information is documented in Family Information Screen CT-WIC <input type="checkbox"/> WIC Selected Referrals Brochure is reviewed and provided Notes:	
Anthropometrics and Blood work	Time:

If done at local clinic, proper technique is used for measurements (Height/Length and Weight)
No shoes, clean diaper, coat removed. Unusual circumstances are documented.

Lab Screen is completed and Growth Chart or Prenatal Weight Gain Grid is reviewed

Height/Length*:

Weight:

Bloodwork result:

Check one: Hct Hgb

*Children should have recumbent length taken until age 2 years.

Notes:

Nutrition Assessment (Risk) and Nutrition Education **Time:**

WIC Nutrition Assessment:

- Nutritionist or paraprofessional reviews required Guided Script Screens in CT-WIC (Breastfeeding/Health/Nutrition)
- If WIC Certification/ Medical Referral Form is completed, staff reviews, countersigns and scans into CT-WIC participant record
- Auto-assigned risks are reviewed for accuracy and appropriate manual risks are selected
- Nutrition risk eligibility is explained to participant
- If Breastfeeding, appropriate assessment is conducted

Notes:

Nutrition Education:

- Nutrition education is relevant to nutrition risk
- Counseling is individualized for participant's category, nutrition risk etc.
- Motivational Interviewing techniques are employed
- Nutrition goal is selected by participant
- Nutrition education materials provided are reviewed with participant

List materials provided:

- Appropriate referrals are made and documented in Referrals Screen (Family/Individual)
- Nutritionist reinforces the value of nutrition education and discusses participant's role in determining relevant nutrition education topics
- Nutrition education type and topic are documented
- Notes are documented

Notes:

Food Prescription and Benefit Issuance **Time:**

- Appropriate staff discusses Food Package selection
- If enrollment appointment, the WIC Food delivery system (i.e. How to use WIC benefits and eWIC card) is explained. WIC Food Guide provided and explained
- Participant is asked about any Food Package changes at re-certification and second nutrition education contacts
- Information is provided on how to use WIC foods (recipes)
- Family Benefits List is reviewed, printed and provided to participant
- WICShopper App is offered and explained
- Questions You May Have About Your WIC Food Benefits (fraud and abuse) is explained

Notes:

High Risk Follow-up

Time:

Reason for HR Assignment:

- Qualified staff provides nutrition assessment and education
- Appropriate referrals are provided, documented
- Follow-up on prior referrals is documented
- Nutrition education is relevant to nutrition risk and is documented in CT-WIC
- Participant concerns/questions adequately addressed

Notes:

- Nutrition education materials provided are explained

List materials provided:

Notes:

Individual/Group Second Nutrition Education Contact

Time:

- Qualified staff provides nutrition education building upon nutrition education at previous visit
- Second contact is relevant to participant category
- Participant(s) questions are addressed
- Appropriate follow-up on previous referrals and documented
- New referrals are appropriate and documented
- Prenatal participants are weighed at every visit and weight is documented
- Nutrition education materials provided and explained

List materials provided:

Notes:

Breastfeeding Education and Support

Time:

- Qualified staff provides breastfeeding assessment and information
- Breastfeeding education is tailored to participant's needs
- Appropriate intervention and referrals are made and documented
- Follow up on prior referrals and documented
- During pregnancy, Breastfeeding Preparation Checklist is reviewed
- Breastfeeding education materials provided and explained

List materials provided:

- Breastfeeding in CT: What Are Your Rights?

Breast Pumps: Review HUSKY Breast pump requirements and assist in obtaining HUSKY pump

- Staff follows WIC Breast pump issuance policy and procedures

Notes:

Breastfeeding Status Change

Time:

Breastfeeding Status:

- Qualified staff updates Breastfeeding Screen
- Prior to issuance of supplemental formula, participant's new breastfeeding goals are documented
- Nutritionist contacts HCP with questions as needed
- Appropriate referrals are provided and documented
- Participant concerns/questions adequately addressed

Questions:

- Changes to WIC Food Packages are discussed. If appropriate, safe formula preparation and storage is reviewed
- Nutrition education materials provided are explained

List materials provided:

Notes:

WIC Medical Documentation Form (Formula Change)

Time:

Reason for Medical Documentation Form:

- Qualified staff provides nutrition assessment and education
- WIC Medical Documentation Form is reviewed for accuracy by Nutritionist
- Nutritionist contacts HCP with questions as needed
- Appropriate referrals are provided and documented
- Participant concerns/questions adequately addressed

Questions:

- Is special formula issuance process reviewed and explained? Is pharmacy selected?
- Nutrition education materials provided are explained

List materials provided:

Notes:

In-eligible Applicant/Participant

Time:

Reason for In-Eligibility:

- Notice of Participant Action Form (NOPA) is completed, participant is asked to sign and Fair Hearing rights are explained.
- Appropriate referrals are provided and documented
- Applicant/Participant concerns/questions adequately addressed

Questions:

Notes: