



Oregon WIC Program — Breastfeeding Peer Counseling Program Client Record Review Tool

INSTRUCTIONS: Review a representative sample of charts for this agency

- **Run the PC Client Participation report in TWIST found in Client Processes → Outputs → Nutrition Ed.**
- **Enter a “From” and “To” date range for several months in the past and select PC status “Completed.”**
- **Leave peer counselor blank if you want to run for all peer counselors, or select a specific peer counselor.**
- **Press the “Run” icon – this report will display all clients with a completed peer counseling status during the date range and peer counselor entered.**

CHART REVIEW SELECTION CRITERIA

- **Report setup: Lists Clinic, Client Name, WIC ID, EDD, ADD, and Language.**
- **Review all records for 15 peer counseling clients assigned to a variety of peer counselors.**



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Agency: _____

Reviewer: _____

Clinic: _____

Date: _____

Citations are made if a problem is found in greater than 20% of the records.

C = Compliance QA = Quality Assurance N/A = Not Applicable

WIC ID NUMBER →			# of NOs											
PEER COUNSELOR NAME →														
1	C	Are the required minimum peer counseling contacts made? If not, were reasonable attempts made to contact client?												
2	C	Are all required contacts made or attempted within the appropriate time frame?												
3	C	Did the peer counselor stay within her scope of practice and make appropriate referrals, if needed?												
4	C	Is there appropriate documentation for client contacts?												

