



Oregon WIC Program — Client Record Review Tool

INSTRUCTIONS: Review a representative sample of charts for your agency

- In TWIST, run LA Chart Review report. This is found in Operations Management → Outputs → LA Chart Review.
- Enter a “From” and “To” date range for one or two months in the recent past. For example, if today is 4/1/05, then you could enter 2/1/05 – 3/31/05.
- Leave clinic blank if you want to run for the entire agency, or select a specific clinic.
- Press the “Run” icon – this report randomly selects clients, so that each time you run it, you will get a different sampling of clients to review.

CHART REVIEW SELECTION CRITERIA

- **Report setup: Lists WIC ID, Client Name, clinic, category, and cert start and end dates. The final column indicates the search criteria used to randomly select the client. These criteria are:**
 - Category of Participant; Type of formula (FM = medical formula); Tailored Food Package (T); Non-English language (SPN = Spanish); High Risk Appts (HR + type of appointment); and Group Education Appts (GE + category of client in class)
 - Note: You may not have client records meeting each of the above criteria depending on how you schedule your high risk clients and your GE classes.
- **Review records entered by a variety of LA staff and a variety of criteria as listed below:**

Category	2 from each category: WP, WE, WN, WB, IB, IE, IN, C1, C2
Food Package	2 with medical formula (FM)
Language	2 non-English
2 nd NE Contact	3 with high risk follow up (1 from each category W, I, C) 3 with group NE (1 from each category W, I, C)



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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			
Clinic →																
Cert Dates →																
Category/Criteria →																
Certifier Name →																
INTAKE																
1	C	Is income documented if client is adjunctively eligible?														
2	C	Is “No proof for special situation” checked if appropriate?														
3	C	Is eligibility pending checked if “no proof” is indicated in any field?														
MEDICAL DATA																
4	C	Are hemoglobin values taken within required timelines?														



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WIC ID Number →			# of NOs											
21	QA	If a partially breastfed infant, is the food package appropriate?												
CHECK DURING ONSITE REVIEW														
22	C	For special medical formula, is there a prescription on file at the clinic site?												
23	C	Is the “No proof for special situations” form on file for applicable clients?												
24	C	Is the participant signature form on file? (check 5 records)												

