

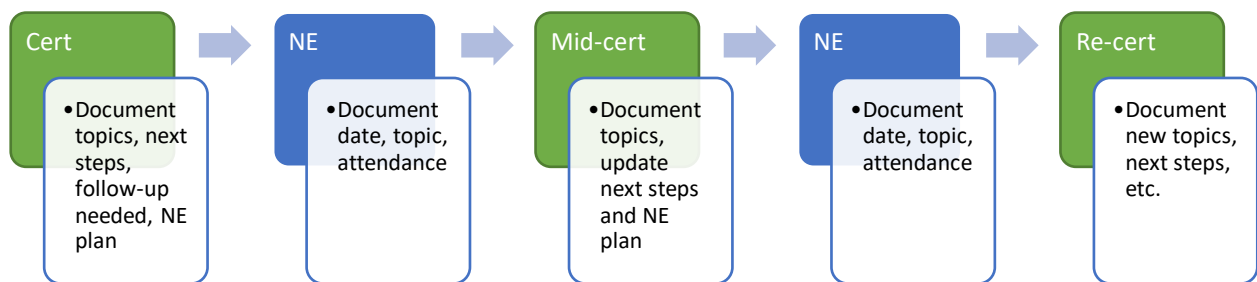
# 8-3 Documenting Quarterly Nutrition Education

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## Document every contact

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Documenting every quarterly contact in the participant record is required by federal regulations. At certification, the data system will remind you to enter documentation if you forget. For contacts that happen outside of the certification appointments, WIC staff need to remember to add the required documentation in the participant's record. Keeping a record of what happened during WIC appointments makes it easier for everyone. It also shows whether nutrition education policies are being followed.



## Documentation of nutrition-focused counseling at certifications

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The first quarterly nutrition education that happens in a certification period is the nutrition-focused counseling that happens during the certification. This initial nutrition-focused counseling must be documented in the participant's record.

### **NE documentation at certifications will include at a minimum:**

- The nutrition-focused counseling topics discussed;
- A next step, including updating the status of the previous next step;
- Future follow-up needed, if any (e.g. with RD, re-check of weight or labs);
- A progress note, if required (e.g. individual care plan, progress in resolving the issue);
- The recommended quarterly nutrition education contacts (e.g. individual sessions, group sessions, or online lesson.)

## Learning activity

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Review a participant's record. Does it include all the required documentation for nutrition education provided at the certification?



## Documenting group quarterly nutrition education contacts

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Quarterly nutrition education can be completed either as part of a group or individually. When participants attend or complete WIC nutrition education groups, online lessons, or support groups, there are places in the data system to capture the required documentation.



**Documentation of group quarterly nutrition education and online lessons includes:**

- The date of the group;
- The title of the group, which lets you know what content was covered; and
- Whether the participant attended or not.

In addition, if the participant has verification that they attended a group provided by one of our partners rather than a group provided by WIC (often referred to as non-WIC NE), the documentation required includes:

- The nutrition content provided;
- The name of the partner organization that provided the nutrition education;
- The date they attended.

**Note:** Group nutrition education can be documented by any WIC staff person.

## Learning activity

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Ask your training supervisor about what nutrition education groups, non-WIC nutrition education classes, and online lessons are provided in your agency.



1. Find and review the record of a participant who attended a group nutrition education class. What group class was attended? Does the record include all the required documentation for group nutrition education?

2. Find and review the record of a participant who took an online lesson. What online lesson was completed? Does the record include all the required documentation for online nutrition education?
3. If your agency offers it, find and review the record of a participant who attended a non-WIC nutrition education class. What non-WIC nutrition education was attended? What organization provided the class? Does the record include all the required documentation for non-WIC nutrition education?

## Documenting individual quarterly nutrition education contacts

If the quarterly nutrition education contact happens one-on-one with the participant, **you must document the topics that were covered at the individual appointment.** This includes individual follow-ups such as weight checks and high-risk appointments.

You must write a progress note if the individual quarterly contact was not completed in person at a clinic or satellite site. The progress note must include the alternative means used for the contact and note the special circumstances that required this.



### **Examples:**

- “Home visit. Participant seen in home by Rhonda Paine, RN due to vulnerable status of infant.”
- “Telephone contact. Participant unable to come to clinic due to physical injury.”
- “Interactive video call. Participant had transportation issues.”
- “Text message contact for quarterly nutrition education due to participant’s scheduling conflict.”
- “Email contact for quarterly nutrition education because of satellite clinic closure due to smoke.”

## Learning activity

Find and review a participant’s record that has an individual follow-up quarterly contact. Does it include all the required documentation for individual nutrition education?



What nutrition-focused counseling topics were discussed?

## Learning activity

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Write a progress note documenting the alternative method of providing nutrition education for the case studies below.

### **Case study 1**

Your agency uses skype technology for the WIC nutritionist to contact a high-risk pregnant woman who is on bed rest.

Progress note:

### **Case study 2**

There is a home-visiting nurse who works for the Maternal Child Health program in your organization. One of the babies they visit is on WIC. The nurse is going to visit the family anyway, so she plans to provide nutrition education during the visit.

Progress note:

## Documentation of nutrition-focused counseling at mid-certification health assessments

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The nutrition-focused counseling that occurs during the mid-certification health assessment is one of the quarterly nutrition education contacts. The certifier must document the nutrition-focused counseling that happens at the mid-certification appointment.

### **Documentation at the mid-certification health assessment will include:**

- The counseling topics discussed. Topics should address nutritional risk(s) previously identified and nutrition-related topics of interest identified by the participant.
- Updating the next step, including the status of the previous next step, when appropriate.
- Future follow-up (if any) needed.
- Identifying and scheduling the next quarterly nutrition education contact.

## Learning activity

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Find and review the record of a participant who attended a mid-certification health assessment. Does it include all the required documentation for mid-certification health assessment counseling?

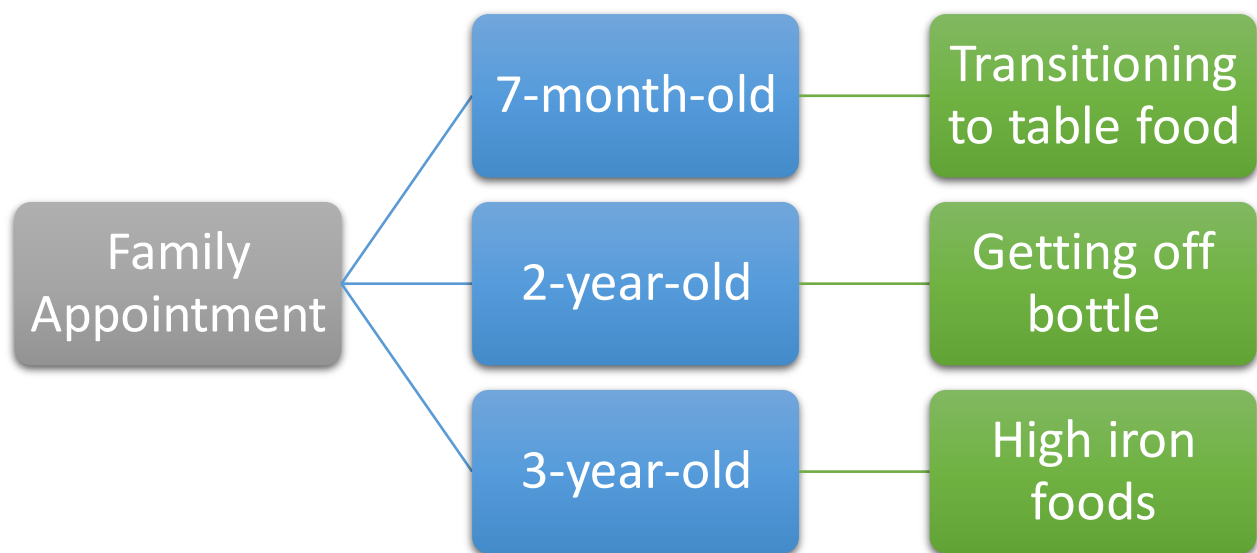
What nutrition-focused counseling was provided at the mid-certification health assessment?

## Documenting quarterly nutrition education for multiple family members

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Sometimes multiple family members on WIC are seen at the same nutrition education appointment. Remember that the topic of the nutrition education provided needs to be appropriate for the individual participant and documented in each participant's record.

**Example:** A family has a 7-month old baby, a 2-year old that is still on the bottle at bedtime with poor dental practices and a 3-year old with a low hemoglobin. All of the children are scheduled to be seen together at one time. The certifier documents the topics covered for each participant in the individual participant record. That way the next certifier to see one of the family, will be able to see at a glance the topics that were covered for that participant's needs.



## Learning activity

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What would you document in each participant's chart in this case study?



### Case study

Willow is a low-risk pregnant woman who is getting her quarterly nutrition education at the same time as her underweight 2-year-old, Wanda. Wanda is having her weight checked at an individual follow-up appointment.

Willow:

Wanda:

## Documenting refusal of nutrition education

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With the number of nutrition education options available in WIC, most participants can find a nutrition education option that meets their needs. In the rare instance when a participant refuses the future quarterly nutrition education contacts offered during the certification, you must document the refusal in the participant's record.

Documentation of refusal must include:

- The reason for refusal;
- How they will contact the WIC clinic, either in person or over the phone, the month their food benefits end so they can continue receiving WIC benefits.

See [Policy 810—Nutrition-Focused Education and Counseling](#) for further information.

## Learning activity

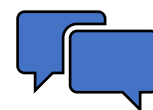
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Discuss with your training supervisor how to promote and offer nutrition education that best fits the needs of the participant to reduce the number of times a participant refuses all quarterly nutrition education. Ask your training supervisor to show you how to document refusal of nutrition education in the data system.



## Talk it over

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Ask your training supervisor any questions you have about documenting quarterly nutrition education contacts.

## References

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[Policy 810—Nutrition-Focused Education and Counseling](#)  
[Policy 840 – Documentation of Nutrition-focused Education and Counseling](#)

