



Nutrition Services Documentation

February 2026

Overview

This in-service is the last part of Oregon WIC's management evaluation corrective action plan. It is also a requested topic heard during past training supervisor calls. Many programs experienced significant staffing and process challenges as a result of the COVID pandemic. This in-service offers some necessary technical assistance as programs transition back into a more stable, in-person environment.

Who must complete this training

This training was developed for all Oregon WIC Certifiers and Nutritionists. Staff must complete this training by April 15, 2026 as a part of the Oregon WIC Management Evaluation Corrective Action Plan. Submit documentation of completion by April 30, 2026.


How to use this guide

Use this guide as a companion to the PowerPoint slide deck. Much of what is included in this guide is also in the Notes section of the PowerPoint slides. The guide includes additional information about slide content and suggestions for activities.

Tips for facilitators

- Use the PowerPoint slides and this guide to share with groups.
- Tailor the slide show to fit your agency needs. For example, you may want to do the training in a series of short sessions rather than one.
 - Please do not edit the content of this training. The content meets the requirements for our corrective action plan with USDA-FNS.
- There are no slides with animation in this slide deck.
- Slide numbers are indicated at the top of each page.


Slide 2



Objective

Certifiers will be able to identify the required nutrition services documentation for:

- Mid-certification assessments
- Nutrition education offered or delivered
- Next steps discussed, and
- Referrals provided

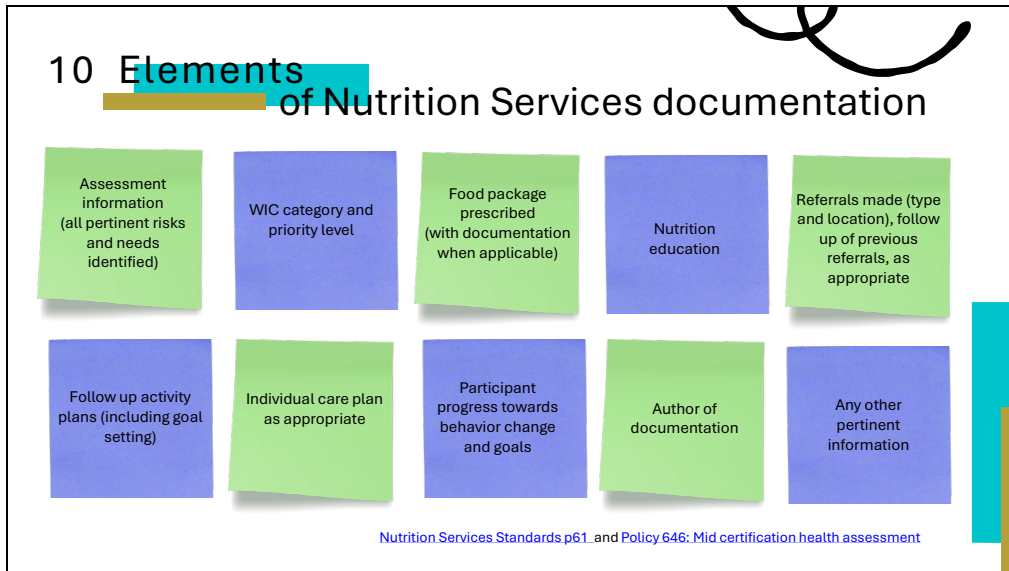


Objective

At the end of this training Certifiers will be able to identify the required nutrition services documentation for:

- Mid-certification assessments,
- Nutrition education offered or delivered,
- Next steps discussed with participants, and
- Referrals provided.

Slide 3



This in-service is the last part of Oregon WIC’s management evaluation corrective action plan. It also includes requested topics from past training supervisor calls. During the COVID pandemic many programs experienced significant staffing and process challenges. This in-service shares some necessary technical assistance as programs transition back into a more stable in-person environment.

Every certification, recertification and mid certification should contain all ten elements of nutrition services documentation. They are:

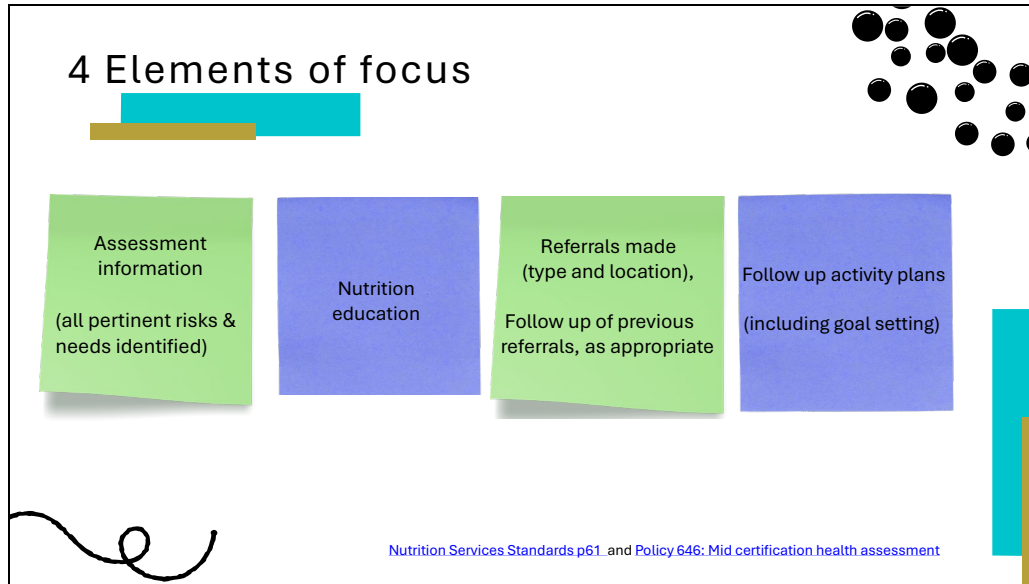
1. Assessment information
 - Identify all relevant risks and needs
2. WIC category and priority level
3. Food package selected
 - Include documentation when needed
4. Nutrition education
5. Referrals made this includes

- Type and location and
 - Follow-up of previous referrals as appropriate
6. Follow-up activity plans
 - This includes goal setting
 7. Individual care plan as appropriate
 8. Participant progress toward behavior change and goals
 9. Author of the documentation
 10. Any other pertinent information

Resources:

1. [WIC Nutrition Services Standards](#), page 61
2. [Oregon WIC Policy 646: Mid-Certification Health Assessment](#)

Slide 4



Four areas for improvement in documentation were identified during the management evaluation.

This training addresses those areas:

1. Assessment information
 - Particularly health and diet assessments at the mid certification.
2. Nutrition education
3. Referrals made
 - Type and location and
 - Follow up of previous referrals, as appropriate
4. Follow up activity plans

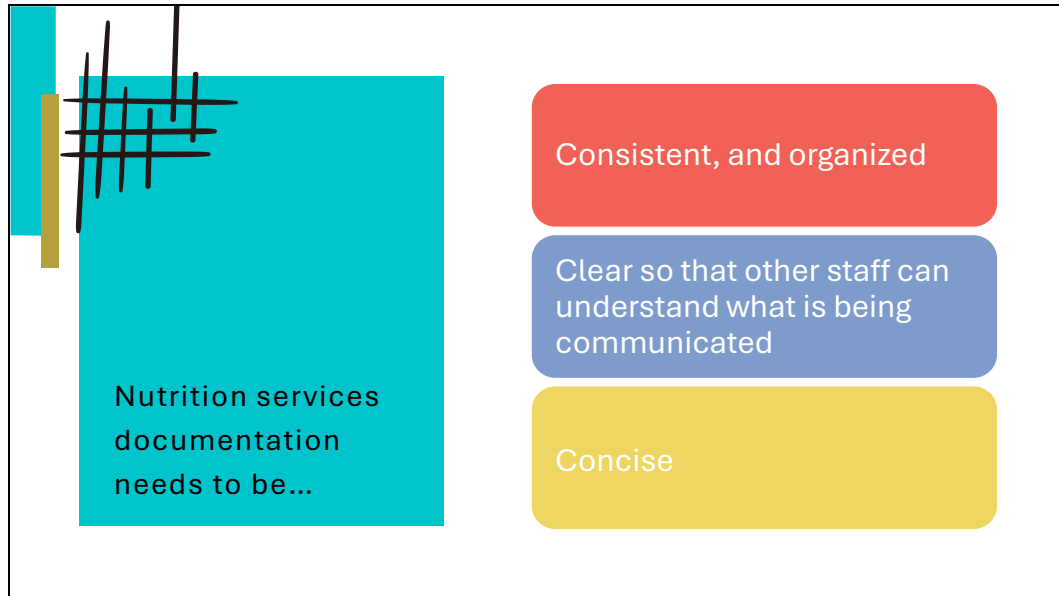
If you need more information about the other elements, please reach out to your Training supervisor or WIC coordinator.

References:

1. [WIC Nutrition Services Standards](#), page 61
2. [Oregon WIC Policy 646: Mid-Certification Health Assessment](#)

A key outcome of nutrition services documentation is to capture a complete picture of the participants visit in a manner that is easy to retrieve and review, enabling staff to build upon the follow up on prior visits. It provides invaluable information for managing and evaluating services delivered. It also serves as a primary way for staff to communicate and share vital information to each other about the nutrition services participant receives and the participant's specific issues and needs. Documentation can be electronic, or paper based. Quality documentation facilitates the delivery of meaningful nutrition services and ensures continuity of care for participants. It also improves program integrity and coordination with the healthcare community.

Slide 5



Nutrition services documentation needs to be:

- Consistent and organized
 - This helps others understand what you are sharing
- Clear
 - Other staff need to be able to understand what is being shared.
- Concise
 - Short and to the point in a participant-centered tone.

Slide 6

Nutrition services documentation needs to be...

Complete and correct so that it creates an accurate picture of:

- the participant
- the visit
- his/her relevant issues
- describes or lists the services provided over time
- outlines a plan for future services

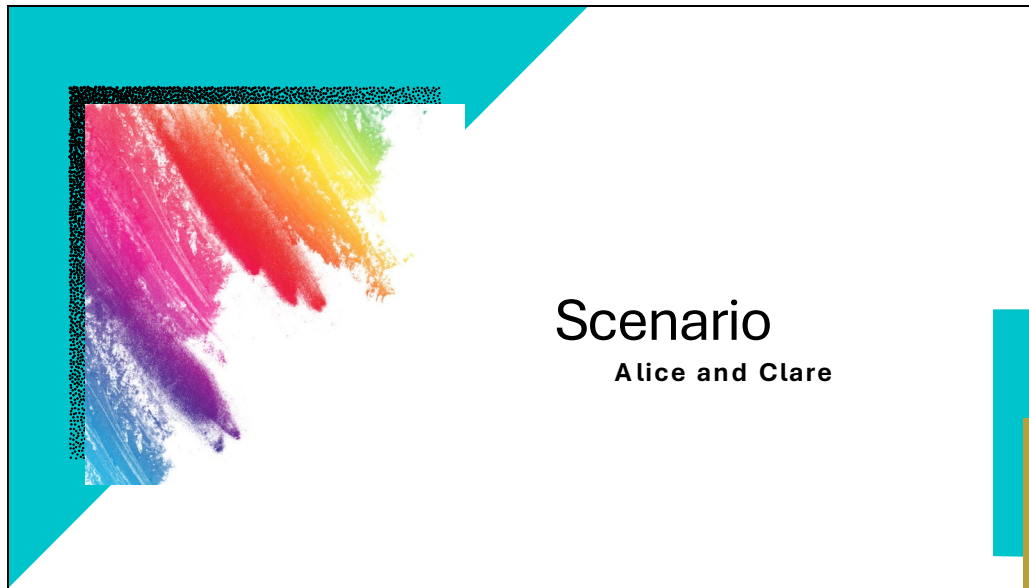
Nutrition services documentation should paint a complete and accurate picture of

- The participant
- The visit
- The person's relevant issues
- The services provided over time
- An outline for future services

This might include the following:

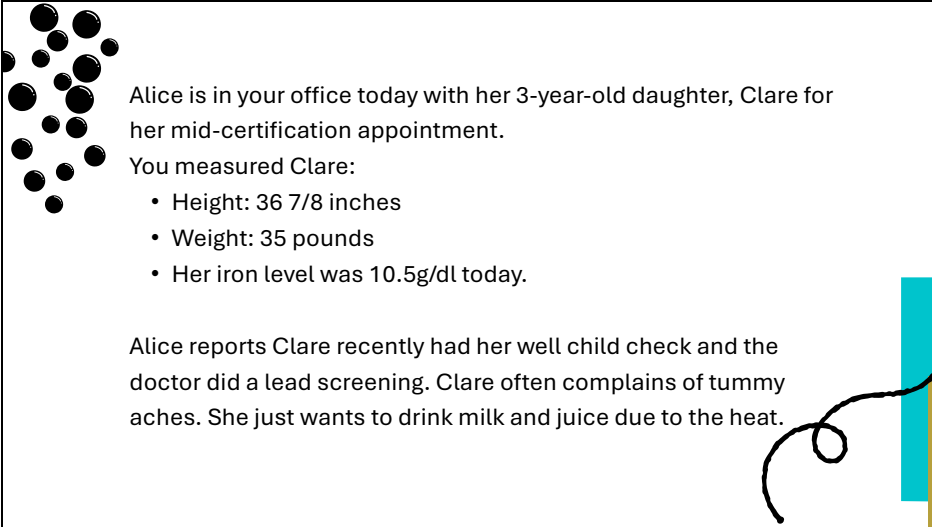
- Assessments
- Referrals offered/made in the appointment
 - Information shared by text, provided verbally, or handouts sent electronically
- Nutrition related next steps that participants set in collaboration with the certifier during the appointment
- Nutrition education topics covered in the appointment

- Slide 7



Follow along through one mid-certification appointment in the following slides. The examples will demonstrate what is expected for these four areas of nutrition services and documentation.

Slide 8



Alice is in your office today with her 3-year-old daughter, Clare for her mid-certification appointment.

You measured Clare:

- Height: 36 7/8 inches
- Weight: 35 pounds
- Her iron level was 10.5g/dl today.

Alice reports Clare recently had her well child check and the doctor did a lead screening. Clare often complains of tummy aches. She just wants to drink milk and juice due to the heat.

Note: Slides 8 and 9 provide information about Clare's visit.

This is the information you gather as part of Clare's initial assessment; we're starting to create an accurate picture of Clare's situation.

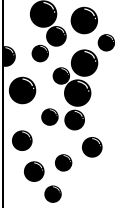
Alice is in your office today with her 3-year-old daughter, Clare for her mid-certification appointment.

You measured Clare:

- Height: 36 7/8 inches
- Weight: 35 pounds
- Her iron level was 10.5g/dl today.


Alice reports Clare recently had her well child check and the doctor did a lead screening. Clare often complains of tummy aches. She just wants to drink milk and juice due to the heat.

Slide 9



The doctor suggested Clare try lactose free milk to see if this helps her belly stop hurting. Alice is worried about the cost. Lactose free milk is expensive, and she isn't sure how it will taste. She doesn't want to waste food as she often runs out of food by the end of the month.

Alice doesn't mind Clare drinking juice. It is the 100% juice that WIC provides. Her dentist says Clare's teeth are fine. Alice shares she has tried diluting the juice with water. Clare really likes it when Alice makes popsicles this way.



The doctor suggested Clare try lactose-free milk to see if this helps her belly stop hurting. Alice is worried about the cost. Lactose free milk is expensive, and she isn't sure how it will taste. She doesn't want to waste food as she often runs out of food by the end of the month.

Alice doesn't mind Clare drinking juice. It is the 100% juice that WIC provides. Her dentist says Clare's teeth are fine. Alice shares she has tried diluting the juice with water. Clare really likes it when Alice makes popsicles this way.

Slide 10

What would you add to this medical data screen based on the information you've received so far?

Ask

What information would you add to the medical data screen based on what you have learned so far?

This slide shares an image of the Anthropometric screen in the Medical Data tab for Clare. No data from the visit has been added.

Answer:

Collection Date		Weight		Length/Height			Length/Ht For Age	Wt For Length	BMI	BMI %	Birth Data	Medical Notes
	E/M	LBS	OZ	E/M	Inch	1/8	R/S					
09/09/2025	ENGLISH	35	0	ENGLISH	36	7	STANDIN	36.00		18.09	94.00	
03/09/2025	ENGLISH	35	0	ENGLISH	35	5	STANDIN	45.00		17.90	89.00	
07/18/2024	ENGLISH	27	6	ENGLISH	33	5	STANDIN	55.00		17.02	66.00	
01/08/2024	ENGLISH	24	1	ENGLISH	31	2	RECUMB	32.00	84.00			
10/23/2023	ENGLISH	24	0	ENGLISH	31	0	RECUMB	67.00	86.00			MOC provid

Collection Date	Hemoglobin	Hematocrit	Blood Lead Level
09/09/2025	10.50	.00	0.0
07/05/2025	13.50	.00	0.0
07/18/2024	13.20	.00	0.0
07/19/2023	12.70	.00	0.0
04/17/2023	10.50	.00	0.0

Collection Date	E/M	Inch	1/8	NCHS Percentile
09/09/2025	ENGLISH	0	0	0.
01/08/2024	ENGLISH	18	7	83.
10/23/2023	ENGLISH	18	4	75.
07/19/2023	ENGLISH	18	2	82.

Answer

You would add the new measurements and blood work taken today in the office into the data system

The slide shows the Anthropometric screen in the TWIST data system with new data entered. The new data has a red circle around it.

Slide 12

What would you add to this health history screen based on the information you've received so far?

Medical Data Health History Diet Assessment NE Plan Progress Notes Food Package Assignment

CPA Verification
Questionnaire: Child Health History
Visit Date: 01/28/2025 Entered By: Local User 10 CPA Reviewed: Show: All

Questionnaire

No.	Question	Answer	Notes
01	Tell me about your child's health	she needs lactose free milk	
02	Does your child have any health problems or medical conditions? 300+	No	
02.6	What has your dentist said about your child's dental health? 381	No oral health conditions	
03	Is your child taking any medicine now? 357	No	
04	Are DTaP vaccines up-to-date?	Older than 24 months, no scree	
04.1	Has your child been screened or tested for lead?	b. No or Unknown, referred	
05	Has your child been in an enclosed space while someone was smoking cigarettes or vaping? 904	No	
06	Do you have any concerns about your child's emotional and/or physical safety?	No	

History

Questionnaire Risk Factors

Enrollment Family Summary Screen Immunizations Status Change Transaction Type Determine Eligibility

Ask

What would you add to the health history screen based on the information you have received so far?

The slide shows the Health History tab in the TWIST data system.

Slide 13

Answer:

No.	Question	Answer	Notes
01	Tell me about your child's health	She needs lactose free milk	
02	Does your child have any health problems or medical conditions? 300+	No	
02.6	What has your dentist said about your child's dental health? 381	No oral health conditions	
03	Is your child taking any medicine now? 357	No	
04	Are DTaP vaccines up-to-date?	Older than 24 months, no scree	
04.1	Has your child been screened or tested for lead?	a. Yes	
05	Has your child been in an enclosed space while someone was smoking cigarettes or vaping? 904	No	
06	Do you have any concerns about your child's emotional and/or physical safety?	No	

Answer

You would select a new questionnaire and update any changes. In this case we would note that Clare had been screened for lead and that she may need lactose-free milk.

Slide 14

What would you add to this diet assessment screen based on the information you've received so far?

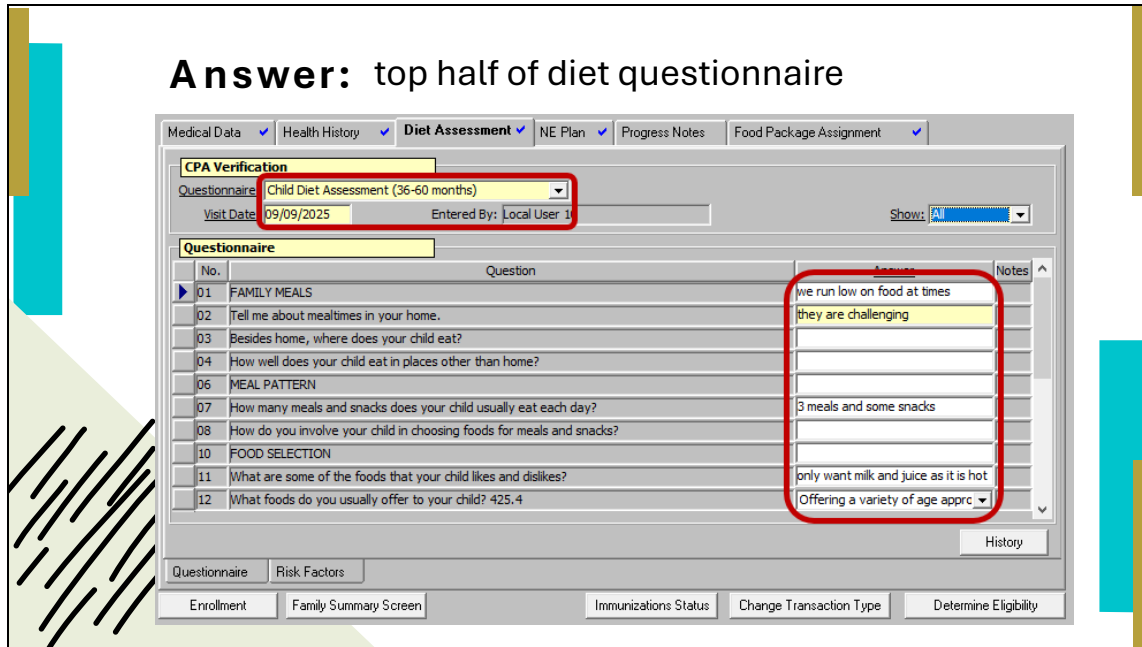
The screenshot shows a software interface for a diet assessment. At the top, there are tabs for 'Medical Data', 'Health History', 'Diet Assessment', 'NE Plan', 'Progress Notes', and 'Food Package Assignment'. Below these is a 'CPA Verification' section with a dropdown menu for 'Questionnaire: Child Diet Assessment (24-35 months)', a 'Visit Date' field with '01/28/2025', and an 'Entered By' field with 'Local User 10'. A 'Show:' dropdown is set to 'All'. The main section is a table with columns for 'No.', 'Question', 'Answer', and 'Notes'. The table contains several rows of questions and answers related to family meals and meal patterns. At the bottom, there are buttons for 'Questionnaire', 'Risk Factors', 'Immunizations Status', 'Change Transaction Type', and 'Determine Eligibility'. A 'History' button is also present at the bottom right of the table area. The interface is decorated with colorful lines and diamond shapes on the left side.

No.	Question	Answer	Notes
D1	FAMILY MEALS		
D1.4	What is mealtime like for you and your family?	okay	
D1.8	What is going well or is challenging at mealtimes?	she eats everything	
D2	MEAL PATTERN		
D2.2	How many meals and snacks does your child usually eat each day?	3meals and few snacks	
D2.5	Who decides when, how much or what your child eats?	she does	
D2.8	What happens if your child does not eat the food that is offered?		
D3	FOOD SELECTION		
D3.4	What are some of your child's favorite or least favorite foods?	loves peanut butter	
D3.7	How willing is your child to try new foods?		

Ask

What information would you add to the diet assessment screen based on the information you have received so far?

Slide 15



Answer:

Once again, we would select a new diet questionnaire for the correct age: 38 months.

Document:

1. The food insecurity. This can be documented here, or you can choose to answer the food insecurity question lower down in the questionnaire. Any method is acceptable, but it must be documented.
2. The challenging mealtime as Clare just picks at her food

The next slide contains the rest of the questionnaire

Slide 16

Answer: bottom half of diet questionnaire

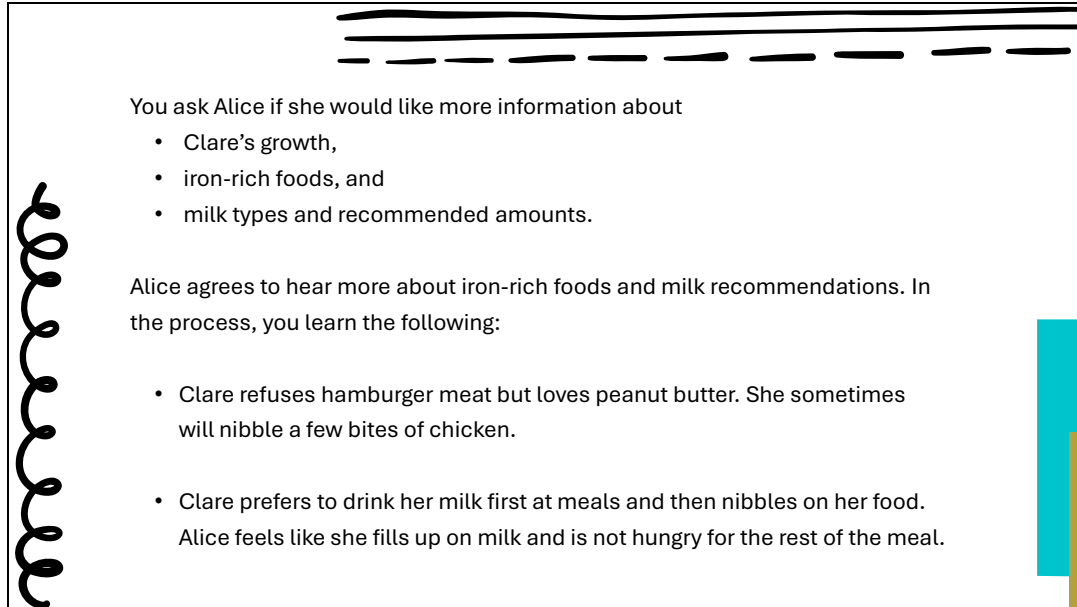
The screenshot shows a software interface for a diet assessment questionnaire. At the top, there are tabs for 'Medical Data', 'Health History', 'Diet Assessment', 'NE Plan', 'Progress Notes', and 'Food Package Assignment'. Below these is a 'CPA Verification' section with a dropdown for 'Questionnaire: Child Diet Assessment (36-60 months)', a 'Visit Date' of '09/09/2025', and 'Entered By: Local User 10'. The main area is a table with columns for 'No.', 'Question', 'Answer', and 'Notes'. Questions 12 through 24 are listed. A red box highlights the 'Answer' column for questions 12, 13, 14, 17, 18, 21, and 22. A red arrow points to the 'Yes' answer for question 14. At the bottom, there are buttons for 'Questionnaire', 'Risk Factors', 'Enrollment', 'Family Summary Screen', 'Immunizations Status', 'Change Transaction Type', and 'Determine Eligibility'.

No.	Question	Answer	Notes
12	What foods do you usually offer to your child? 425.4	Offering a variety of age appr	
13	What beverages do you usually offer to your child? 425.2	Non-sweetened beverages	
14	In the past few months, were there times when your family ran low on food?	Yes	
16	FOOD SAFETY		
17	Does your child eat raw or undercooked meat, poultry, fish or eggs? 425.5		
18	Does your child drink unpasteurized milk or juice? 425.5		
20	FEEDING SKILLS		
21	How well does your child feed himself/herself? 425.4	Feeding skills appropriate for a	
22	What does your child use when drinking? 425.3	Appropriate for age	
24	SUPPLEMENTATION		

Answer (continued)

Line 14 is a spot to document the food insecurity

Slide 17



You ask Alice if she would like more information about

- Clare's growth,
- iron-rich foods, and
- milk types and recommended amounts.

Alice agrees to hear more about iron-rich foods and milk recommendations. In the process, you learn the following:

- Clare refuses hamburger meat but loves peanut butter. She sometimes will nibble a few bites of chicken.
- Clare prefers to drink her milk first at meals and then nibbles on her food. Alice feels like she fills up on milk and is not hungry for the rest of the meal.

More of the story

This is the information you gather as part of Clare's initial assessment; we're starting to create an accurate picture of Clare's situation.

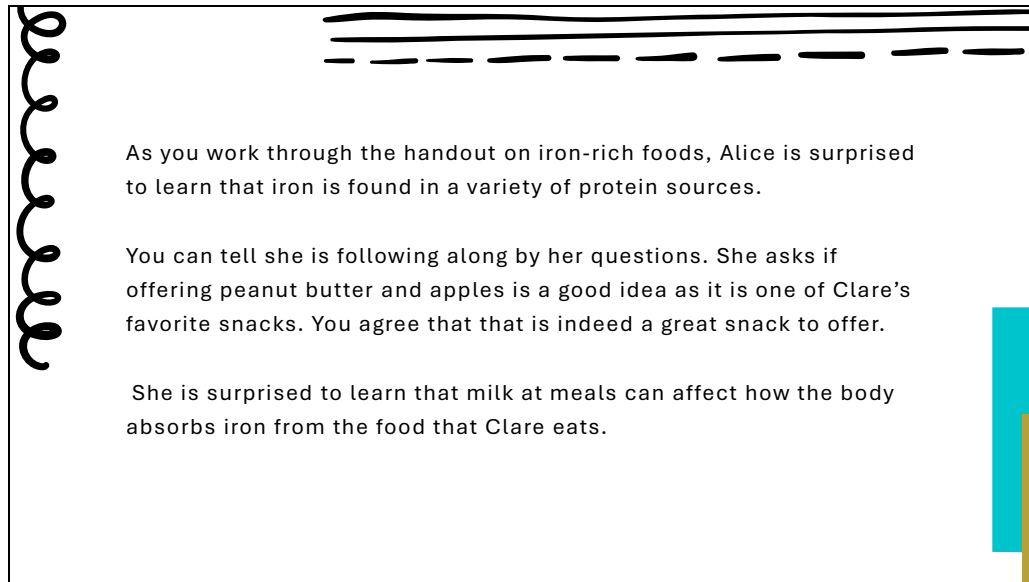
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- Clare prefers to drink her milk first at meals and then nibbles on her food. Alice feels like she fills up on milk and is not hungry for the rest of the meal.

Slide 18



As you work through the handout on iron-rich foods, Alice is surprised to learn that iron is found in a variety of protein sources.

You can tell she is following along by her questions. She asks if offering peanut butter and apples is a good idea as it is one of Clare's favorite snacks. You agree that that is indeed a great snack to offer.

She is surprised to learn that milk at meals can affect how the body absorbs iron from the food that Clare eats.

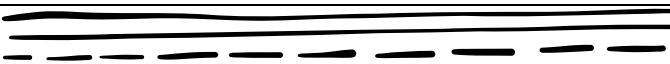
Alice agreed to hear more about iron-rich foods and milk recommendations. As you go through the materials for these topics, highlight relevant information to guide your education.

As you work through the handout on iron-rich foods, Alice is surprised to learn that iron is found in a variety of protein sources.

You can tell she is following along by her questions. She asks if offering peanut butter and apples is a good idea as it is one of Clare's favorite snacks. You agree that that is indeed a great snack to offer.



She is surprised to learn that milk at meals can affect how the body absorbs iron from the food that Clare eats.

Slide 19



You show Alice the MyPlate model. She is surprised that Clare's milk needs are so much less than when Clare was younger.

- Alice mentions that Clare drinking less milk will help. She is still not sure how she is going to afford the lactose free milk. You share that lactose free milk is a milk WIC can provide for Clare.



Continue to highlight some pertinent information to guide your education with Alice.

You show Alice the MyPlate model. She is surprised that Clare's milk needs are so much less than when Clare was younger.

- Alice mentions that Clare drinking less milk will help. She is still not sure how she is going to afford the lactose free milk. You share that lactose free milk is a milk WIC can provide for Clare.

Slide 20

Select 4 topics from the list below to document what NE was provided during the appointment

- Juice: Limit
- Feeding Relationship
- Milk: limit
- Iron foods and supplements
- Milk: type
- 1Food Package tailoring and maximums

Ask

Which four of these topics would you choose to document nutrition education provided during the appointment?

(they are listed as they are seen on the nutrition education screen in TWIST)

Juice limit

Feeding Relationship

Milk: Limit

Iron foods and supplements

Milk: Type

1Food Package Tailoring and maximums

Accept all answers. Use the opportunity to hear the reasons for the choices.

Slide 21

Select 4 topics from the list below to document what NE was provided during the appointment

- Iron foods and supplements
- Milk: type
- 1 Food Package tailoring and maximums
- Milk: limit

Answer

These are the four things that can be confidently documented.

- Iron foods and supplements
- Milk: Type
- 1 Food Package Tailoring and maximums
- Milk: Limit

Here's why:

- Juice was an issue. However, Alice wasn't concerned about Clare's juice intake. You did not explore that further
- Feeding relationship could have been a topic but you didn't talk about that.

Slide 22

The screenshot shows the 'NE Provided' section of the TWIST data system. It features a table with columns for 'Date Provided' and 'Topic'. The following topics are listed:

Date Provided	Topic
08/01/2022	BF: INCREASING MILK SUPPLY
09/09/2025	MILK TYPE
09/09/2025	MILK: LIMIT
09/09/2025	IRON FOODS AND SUPPLEMENTS
09/09/2025	1FOOD PACKAGE TAILORING AND MAXIMUMS

Below this table is the 'Materials Provided' section, which is currently empty. At the bottom of the screenshot, there are navigation buttons for 'Insert', 'Remove', and 'Search By Topic', along with a series of tabs including 'Last Visit Summary', 'Risks/Interventions', 'NE Provided', 'Next Steps', 'Referrals', and 'Next Appointment'.

The most accurate topics to document are:

Here is how this looks on the NE Plan tab in the TWIST data system. Choose the following dropdowns from the menu:

Milk type

You talked about lactose free milk

Milk: limit

You recommended daily allowance of dairy and talked about how dairy affects iron

Iron foods and supplements

You reviewed the handout that includes info on high iron foods and what impacts absorption

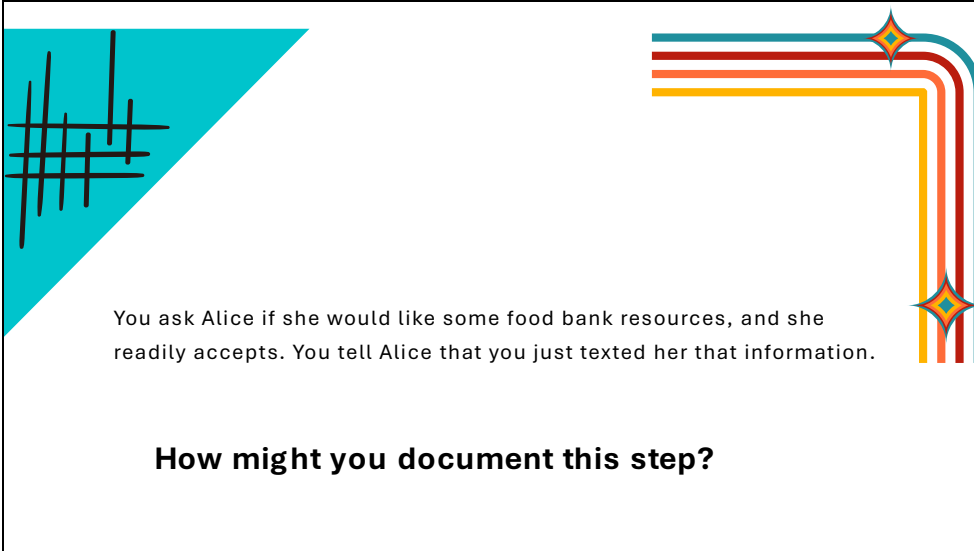
1Food packages tailoring and maximums

You spoke about what milk was available on the program

Note:

One challenge may be recognizing the difference between what is an assessment versus what counts as nutrition education. Talk with your training supervisor about this about the difference if needed.

Slide 23



You ask Alice if she would like some food bank resources, and she readily accepts. You tell Alice that you just texted her that information.

How might you document this step?

Back to Alice.

You ask Alice if she would like some food bank resources, and she readily accepts. You tell Alice that you just texted her that information.

Ask:

How will you document this step?

Allow the group to discuss before moving to the next slide.

Answer:

Medical Data Health History Diet Assessment **NE Plan** Progress Notes Food Package Assignment

Referrals from WIC

Visit Date	Referral Category	Organization	Phone Number	Status	Date Ended
09/09/2025	FOOD RESOURCES	EMERGENCY FOOD PANTRIES	(999)999-9999 x0	Recommended	00/00/0000

Text sent to client

WIC: Hi Alice, it was great meeting with you. Here is the Food resources number I said I would send (999)999-9999. Let me know if you need any other resources :)

More Info.

Last Visit Summary Risks/Interventions NE Provided Next Steps **Referrals** Next Appointment

Enrollment Family Summary Screen Immunizations Status Change Transaction Type Determine Eligibility

Documenting the text

You sent the text using Teletask. It says,

“WIC: Hi Alice, it was great meeting with you. Here is the food resources number I said I would send (999)999-9999. Let me know if you need any other resources.”

This is documented on **NE tab** in TWIST under “**Referrals from WIC**”

Select the following from the drop-down menus in each column:

Visit date: enter the date the text was sent

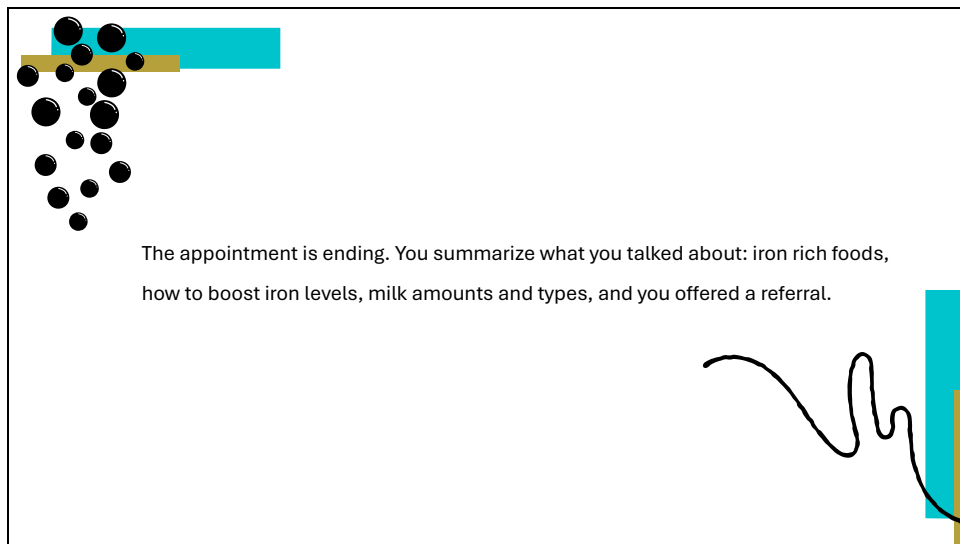
Referral category: Food Resources

Organization: Emergency food pantries

Phone Number: (enter the phone number)

Status: Recommended

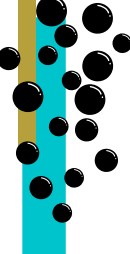
Slide 25





Back to Alice

The appointment is ending. You summarize what you talked about: iron rich foods, how to boost iron levels, milk amounts and types, and you offered a referral.

Slide 26



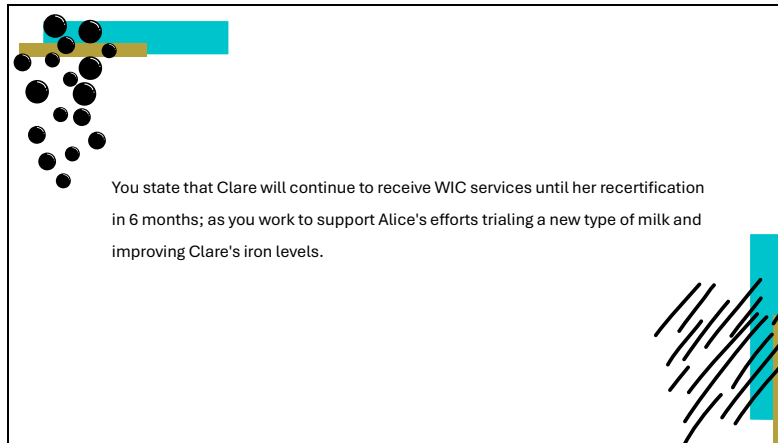
You ask Alice if there is anything related to any of these topics that she would like to work on with Clare until you meet again. Alice says she is excited to only offer one cup of lactose free milk a day to help reduce Clare's milk intake. She is also curious to see if this helps improve her belly aches and iron levels. She is proud that she is already offering an iron rich snack.



You ask Alice if there is anything related to any of these topics that she would like to work on with Clare until you meet again.

Alice says she is excited to only offer one cup of lactose free milk a day to help reduce Clare's milk intake. She is also curious to see if this helps improve her belly aches and iron levels. She is proud that she is already offering an iron rich snack.

Slide 27



You state that Clare will continue to receive WIC services until her recertification in 6 months; as you work to support Alice's efforts trying out a new type of milk and improving Clare's iron levels.


Slide 28

From the selection below, what might a good next step be for this family?

Eat more iron rich foods with high vitamin C foods to boost her hgb

Drink less juice to help improve her appetite

Offer 1 cup of lactose free milk/day to help limit her milk intake



Ask:

Which of these might be a good next step for Alice and her family?

- Eat more iron-rich foods with foods that are high in vitamin C to boost her hemoglobin
- Drink less juice to improve Clare's appetite
- Offer 1 cup of lactose free milk each day to help limit milk intake

Accept all answers and discuss the reason for the choice.

Slide 29

The screenshot displays a software interface with several tabs at the top: Medical Data, Health History, Diet Assessment, NE Plan, Progress Notes, and Food Package Assignment. The 'NE Plan' tab is active. Below the tabs, there are two main sections:

- Next Steps:** A table with columns: Visit Date, Next Steps, Status, and Date Ended. The first row is highlighted with a red box and contains: 09/09/2025, Only offer 1 cup of lactose free milk a day to help limit her milk intake, In Progress, and 00/00/0000.
- NE Visit History:** A table with columns: Visit Date, Appt. Type, Class Title, and Attended. It shows three rows of group education sessions.

At the bottom of the interface, there are several buttons: Last Visit Summary, Risks/Interventions, NE Provided, Next Steps, Referrals, Next Appointment, Enrollment, Family Summary Screen, Immunizations Status, and Change Transaction Type.

A pink circle with a black outline and the text "Answer:" is overlaid on the bottom right of the screenshot.

Important Discussion Note:

Staff may notice that Alice chose a next step that is not a WIC recommendation! The certifier shared the My Plate recommendation for milk (2 cups/day), but Alice chose to offer only 1 cup of milk a day. As in any case study, we don't know all the information or why Alice made this choice.

This is a great opportunity to discuss with staff how we handle this situation in clinic.

The focus of this training is on accurate nutrition service documentation.

- The next step needs to be written as the participant states it, even when it does not match the WIC recommendation for milk intake.
- Staff need to document what the participant has identified as their next step, not what “we” in WIC want for them.

Answer

Alice told you she is excited to only offer one cup of lactose free milk a day to help reduce Clare's milk intake. That is the best answer for next steps to enter in the data system.

You did talk a bit about iron rich foods, but Alice wanted to focus on reducing the milk intake. Choosing iron rich foods as a goal would not be accurate as a next step.

Juice came up in the diet assessment but was not part of what Alice wanted to focus on for nutrition education or as next step. It would not be accurate to put as a next step.



Summary

Every certification, recertification and mid certification should include all 10 elements of nutrition services documentation. We covered these four elements in this training:

1. Assessment information: particularly health and diet assessments at the mid certification
2. Nutrition education
3. Referrals made: (type and location), follow up of previous referrals, as appropriate
4. Follow up activity plans

Good nutrition services documentation gives a clear and complete record of each visit. It helps staff easily review past visits, communicate important details, and plan future care. Whether on paper or digital, strong documentation supports quality service, keeps care consistent, and helps programs work better with the healthcare system.