



## Section 4: Clinic Flow

### Overview

To achieve successful eWIC implementation, several aspects of service delivery need to be addressed before roll out. Planning ahead for how a participant will move through the process of receiving benefits in your clinic will help assure that staff and other resources are utilized in the most effective manner possible for your agency. Careful consideration of how your clinic flows and the changes eWIC requires will result in new procedures that support the long-term success of eWIC.



Have you viewed the “*Policy Changes that Impact Clinic Flow*” webinar?

### Staffing needs

We know that staff will spend their time in a little different way than they did before eWIC. Now they will not spend time printing vouchers, changing or replacing vouchers or dealing with lost or stolen vouchers. Instead, staff will spend time adding or updating cardholder information, issuing eWIC cards and helping participants without internet or phone access set PIN numbers.

Evaluation of clinic flow will help you collect information to plan for these shifts in routine tasks. After you have evaluated clinic flow, there may need to be adjustments to clinic staffing patterns or task assignments. What might these be for your agency?

### Questions for Consideration

- How will the check-in, check out process change for individual appointments and group education sessions?
- How will separation of duties affect staff assignments?
- What responsibilities will be assigned to which positions?

## Issuing benefits

The following actions are all a part of issuing food benefits in an eWIC environment. Think about each of your clinic settings, including satellite sites, and visualize how these actions will look.

### Questions for Consideration

- Where will each step happen?
- Who will be responsible for these tasks?
- What is the most efficient flow possible in each situation?

Click [here](#) for a clinic flow review tool which can help illustrate where these actions might fit into the flow of an interaction with a participant. This document may be used to assist with your assessment of the following activities:

- Add cardholder information
  - Helping the participant to decide on one or two cardholders per family
  - Document cardholder information in TWIST for each family: name, birth date, address, zip code
  - See Policy 510e *eWIC Cardholder Responsibilities*
- Issue eWIC card
  - One or two cards per family
  - Distribution from a central location or by individual staff
  - Replacing cards
  - Determine need for separate WIC ID card
  - See Section 6: eWIC Cards and Inventory
  - See Policy 610e *Required Proofs: Identity, Residency, Income*
- Issue food benefits to the participant's eWIC account
  - In a group: group education sessions, health fairs
  - At an individual appointments: certifications, IEs, follow ups, home visits
  - At satellite sites



- Issue food benefits over the phone in the following situations
  - After food package changes have been made by a CPA
  - Completion of online nutrition education
  - Issuance of formula to a temporary newborn
  - Change in the form of formula (powder to concentrate for example)
  - After receiving proofs via fax or mail and eligibility pending is removed
  - See Policy 511e *Issuing Food Benefits*
- Print benefits list
  - Access to laser printer in each clinic including satellites
  - List is offered, not required to print for all
- Educate cardholders on shopping with eWIC
  - Offer shopper education materials, tip sheet
  - Describe shopping experience
  - Explain aggregated benefits
  - Know your balance; use all benefits each month
  - Keep eWIC card and PIN secure
  - Utilize interpreters to provide education in the participant's language of choice
  - See Policy 635e *Participant Notification*
  - Set PIN
  - Make a phone available in the clinic for cardholders to use when phone and internet access is unavailable to them at home.
  - Use ebtEDGE for assistance.
- Formula exchange
  - Unopened cans of formula are brought into the clinic for exchange
  - Purchased formula is not accessible to the infant due to a custody change or a domestic violence situation
  - Stolen formula with a police report
  - A documented disaster (fire, earthquake, etc) where the formula is no longer available
  - See Policy 561e *Program Integrity: Replacement of Redeemed Food Benefits*
- Answer participant questions
  - Assure adequate phone access, reduce hold times
  - Determine which questions can be referred to ebtEDGE.

## Separation of duties

Program integrity needs to be protected with eWIC just as it is currently. Policies that prevent fraud and abuse are still in place. These policies include not issuing benefits to friends and family members and separation of duties.

Separation of duties must be addressed when issuing benefits during certifications in order to assure program integrity. At least two staff members need to be involved in the certification process when benefit issuance happens along with eligibility determination. See Policy 595e *Separation of Duties*.

Before eWIC, separation of duties occurred when one staff completed the certification and another staff member printed the vouchers. With eWIC, one staff member conducts all or part of the eligibility screening while another issues benefits to the participant's account. See examples of how these responsibilities might be divided below.

Benefit issuance at a second nutrition education contact does not need to follow these same criteria as eligibility is not being determined at the same time as issuance.

### **Example of options for separation of duties:**

- A clerk completes the intake for the certification appointment including screening for proofs before the certifier conducts the health and diet assessment, assigns food packages and issues benefits.
- A certifier completes the intake, health and diet assessment and assigns food packages for a certification appointment then the clerk issues benefits and prints the benefit list.
- A home visiting nurse completes a certification in the home. She brings the information back to the clinic where it is entered by a certifier who issues benefits to the participant's eWIC account.

## Clinic examples

Here are sample scenarios to illustrate possible staffing patterns and clinic flows in specific situations. Consider how these might look in your clinic.

**Enrollment of a new participant**

Separation of duties comes into play when eligibility is being determined. In this example, separation of duties is addressed by having the certifier complete intake and certification and having the clerk issue benefits and provide shopper education. With a new enrollment, shopper education, printing a benefit list and new card issuance will be an integral part of the appointment. How would these activities be handled in your agency?

**Example:**

Ellen is here for a new prenatal appointment. The clerk greets Ellen at the front desk and notifies the certifier that Ellen has arrived. The certifier invites Ellen back to her office so she can complete the certification from screening proofs to scheduling the next appointment. Ellen returns to the front desk where the clerk adds her cardholder information, issues her new eWIC card, adds benefits to her account and prints a benefit list. The clerk covers shopper education with Ellen and explains the use of the eWIC card and how to set her PIN. Ellen leaves the office well educated on shopping with her eWIC card!

**Certification of a returning eWIC participant**

Separation of duties comes into play when eligibility is being determined. In this example, separation of duties is achieved by having the clerk screen proofs and the certifier issue benefits after completing the certification. Checking in with the shopper regarding their experience using the eWIC card would be helpful to identify any areas of concern. How would this look in your clinic?

**Example:**

Molly arrives with her 3 year old son, Max, for a recertification appointment. The clerk greets Molly at the front desk and screens her proofs. The certifier escorts Molly and Max back to her office to complete Max's certification and issue his food benefits. The certifier offers to print a benefit list but Molly declines because she checks her balance online. The certifier asks her about her recent shopping experience and Molly confirms that everything has been going well. Molly and Max leave the clinic with three months of benefits and a plan to return for a group session.

**Individual education**

Separation of duties is not an issue during second nutrition education contacts. The certifier or nutritionist can complete the entire individual education or follow up appointment including benefit issuance. In this example, the nutritionist manages the appointment, however, the participant could have returned to the front desk for updating the cardholder information. What would be the most efficient use of staff in your agency?

**Example:**

Brielle comes to WIC for a follow up visit with the RD. She is greeted by the clerk at the front desk and then joins the RD in her office. As they wrap up their time together, the RD issues Brielle's benefits and offers her a benefit list. Brielle asks about adding a second cardholder but notes that he does not have a phone or internet access. The RD enters the new cardholder information, gives Brielle

another eWIC card and offers the use of a phone in the clinic in order for the second cardholder to set his PIN.

**Small group education**

The way that benefits are issued is the primary change in the group education process. There are no vouchers to print during the session or distribute at the end of the session. Benefits cannot be issued from the group education screen in TWIST. In this example, one staff member handles check in and benefit issuance while another facilitates the session, however, it might be possible for one staff member to

handle check in with benefit issuance then facilitate the session depending on the size of the group. How will these changes affect the flow of your group sessions? What would work best in your agency?

**Example:**

Several WIC participants are checking in for their group education. The clerk checks ID and indicates their attendance on the group session list. While a certifier facilitates the session, the clerk looks up each participant in TWIST, documents their attendance, issues benefits and prints out benefit lists. At the end of the session, the clerk distributes the benefit lists to those participants who would like one and she and the certifier answer any questions that participants have about their benefits or their next appointments.

**Large group education**

The main difference between issuing benefits at a small group session vs. a health fair is timing. With a small group, there is a specific beginning and ending time and everyone arrives around the same time so that benefit issuance can be handled as a group. With a health fair model, the length of time spent at the education activity is dictated by the participant and arrival can be sporadic. This means managing benefit issuance one participant at a time. In this example, multiple staff are involved with the fair; however, different staffing patterns could be effective depending on the size of the event and the number of participants expected to attend. What staffing patterns would be most efficient for your agency if this form of group education is offered?

**Example:**

A clerk checks in each participant as they arrive for the health fair. She looks at their ID and asks if they would like to receive a benefit list. While the participant visits the activity stations and interacts with other staff, the certifier pulls up each participant in TWIST, documents their attendance, issues benefits and prints a benefit list if requested. Participants check out at the clerk's desk as they leave the health fair to pick up their benefit list and information about their next appointment.

## Online education

Online education can be a convenient option for low and medium risk participants who have internet access. This is one of the times that benefit issuance can happen over the phone. In this example, the clerk handles benefit issuance over the phone, however, in other situations, a participant might stop by the clinic to report completion of their online course and pick up a benefit list. What updates will you make to your online education policy to account for adjustments made in the procedure for issuing benefits for online education?

### Example:

Patrice calls the clinic to report that she has completed an online nutrition education course. The clerk confirms course completion. The clerk asks Patrice what questions she has about the course as she could refer her to a certifier. Patrice indicates that she does not have any questions, the clerk documents the completion of the online module then issues her benefits and schedules her next appointment.



## Missed nutrition education

If a participant is unable to attend their scheduled nutrition education, reschedule them for another nutrition education appointment within the same month. If it is not possible to reschedule them within the same month, issue one month of benefits and reschedule the second nutrition education activity the following month. The single month of benefits can be issued without requiring that the participant come into the WIC Clinic. See Policy 835e *Nutrition Education: Attendance or Refusal*.



### ✓ Task Checklist:

- ✓ Identify who will be responsible for tasks associated with benefit issuance
- ✓ Determine where each step of benefit issuance will happen
- ✓ Evaluate the effect of separation of duties changes on staff assignments
- ✓ Assign appropriate eWIC responsibilities to each staff position
- ✓ Complete the clinic flow chart
- ✓ Assess the impact of changes associated with individual appointments and group education sessions on clinic flow
- ✓ Identify the most efficient flow possible for each situation in each clinic setting