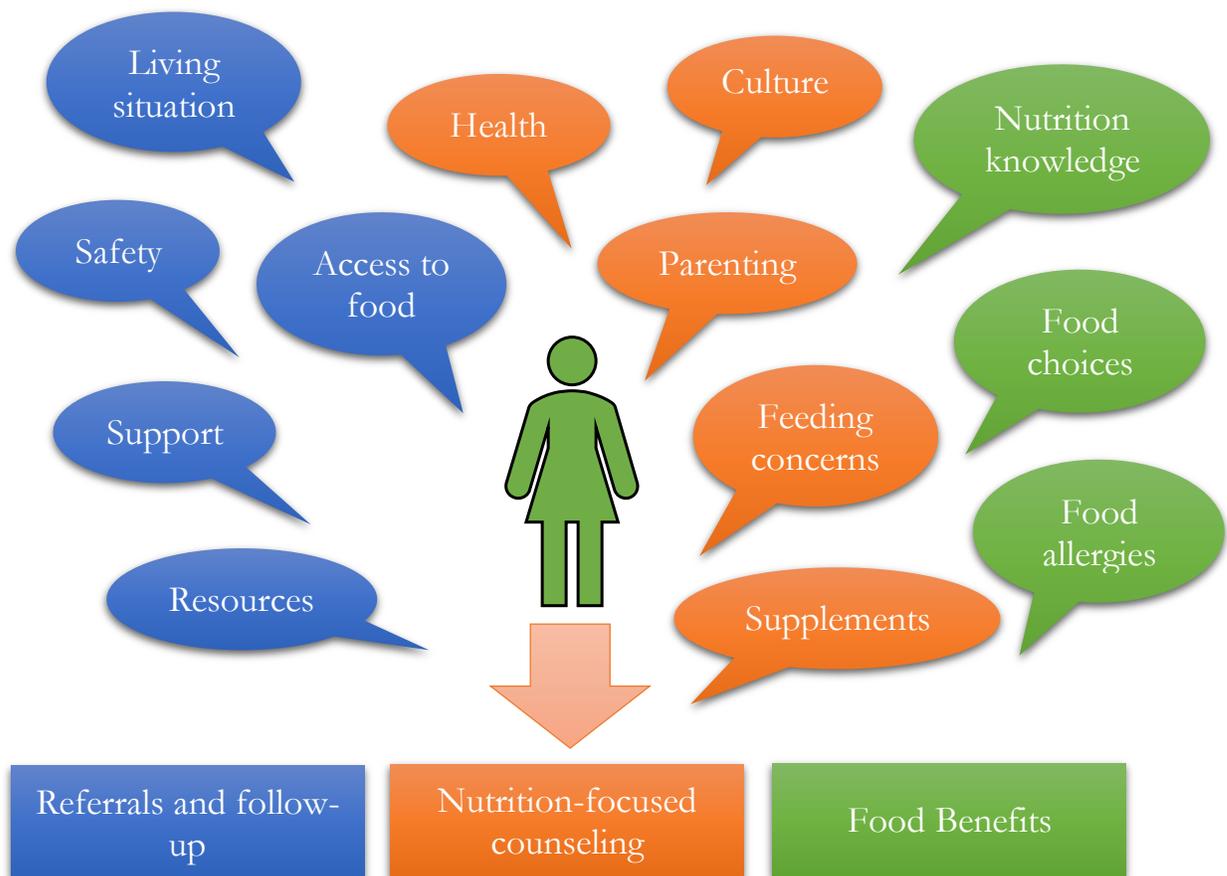


## 4-3 What is a complete assessment?

### Complete the assessment first

Before you begin providing nutrition education, it is important to make sure you have done a thorough and complete assessment and that you have assigned all the appropriate nutrition risks. How will you know when you are done with the assessment and ready to move on to the next part of the certification? It can be difficult to tell when you have gathered all the information you need, especially when there are so few mandatory assessment questions.

You will know when the assessment is complete when you have a complete picture of what is happening with the participant, so you can provide meaningful, targeted nutrition-focused counseling, make useful referrals, and assign a food package that meets the participant needs.



## The art and science of assessment

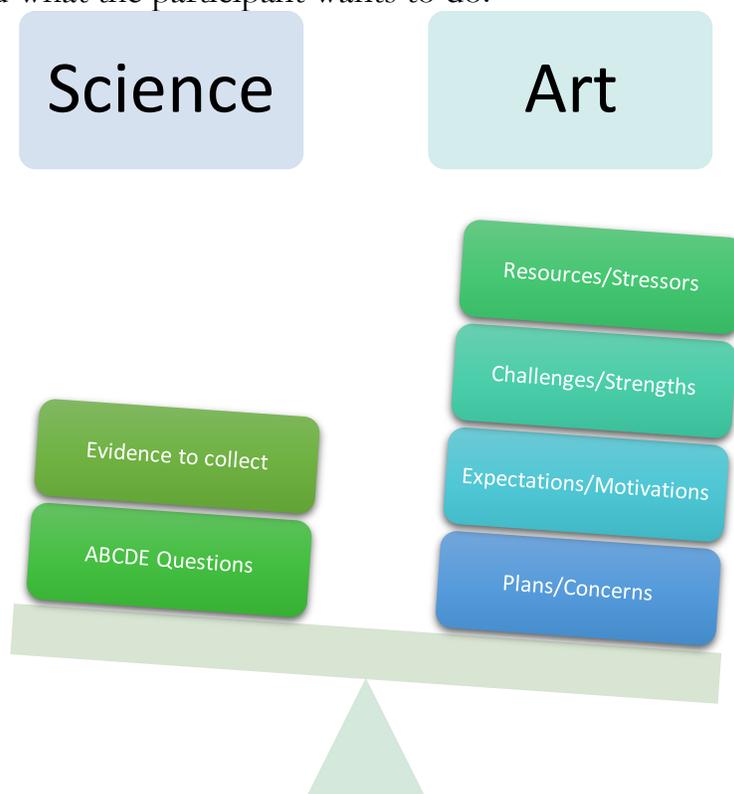
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The problem is - you could ask all the questions from the data system and still not get important information from the participant. You have to look, listen, and feel what is happening in the participant's life.

For example, the term “feeding behaviors” is used to describe everything about a person's relationship with food. Feeding behaviors are more than just what or how much a person eats on any given day. Feeding behaviors include:

- How a person feels about eating – and why they feel that way;
- What their normal meal patterns are like – and what are the reasons they eat when and what they do;
- Foods they prefer or avoid – and why they do so;
- Dietary supplements they take – and the reasons they take them;
- Foods or food habits that are specific to their culture – and how important that is to them.

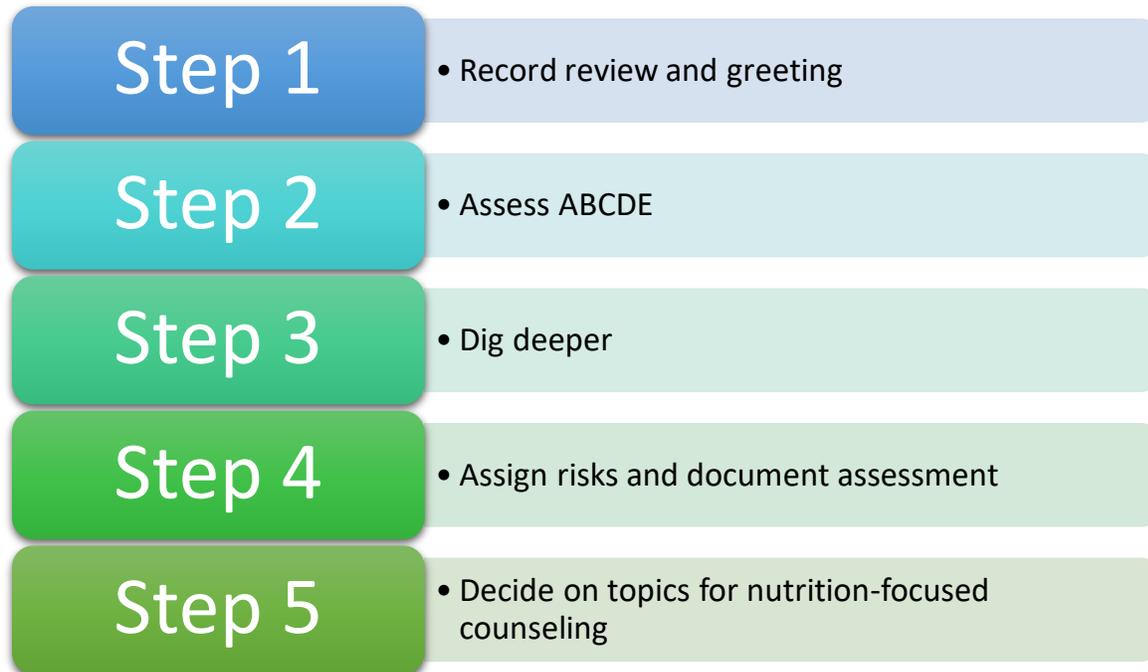
The science of assessment is all the data you collect with questions. The art of assessment is when you use observation and intuition to find out why things are the way they are – and what the participant wants to do.



## 5 Steps to a complete assessment

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The job aid from this lesson titled *Job Aid: What is a complete assessment?* summarizes the step-by-step process for doing an assessment. These steps will be explained in more detail later in this lesson.



### Step 1 – Record review and greeting

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#### **Record review**

Your assessment starts before you even meet the participant. The first thing you do is take a look at any information in the data system about the participant.



- If the participant has been on WIC before, review the information that is in the participant record. This gives an idea of what was going on before and what the participant was working on. Look at:
  - Risks that were assigned last time;
  - Growth trends;
  - Next steps they were working on;
  - Notes or progress notes; and,

- Appointments they were scheduled for and whether they attended.
- Review the information that was gathered during the intake process (at the front desk.) This information will help you get an idea of their living situation.

Look at:

- For women and infants, look at what category was assigned to see feeding method;
- Household size and income to get an idea of family resources;
- Participation in TANF, OHP, and SNAP; and,
- Any referrals recorded at the front desk.

### Greeting the participant

In previous lessons, we have talked about how important it is to engage the family and establish trust and rapport from the beginning.



This initial contact is a time to begin the assessment by using your senses to learn about what is going on with the participant or caregiver. You can't make assumptions based on what you sense, but it does give you an idea of what might need to be explored.

- Sight – what do you see when you look at the participant?
  - Do you see any visible signs of stress or strong emotion?
  - How does the participant act? Nervous, calm, tired?
  - What kind of body language are you seeing?
  - We are not talking about whether they are dressed well or not. That isn't really a good indicator of income or anything else, but children without coats in cold weather could indicate resource limitations.
- Hearing – what do you hear from the participant, caregiver, or other family members?
  - What are the interactions between the group like?
  - What is the tone of voice
- Smell – what smells, if any, do you notice?
  - Are there smells of tobacco, alcohol, or marijuana?
  - Poor hygiene may be an indicator of a difficult living situation or a mental health issue like depression.
  - Baby smells are just a normal part of WIC life, but it may give you an opportunity to offer a place to change diapers! 😊

### Learning activity

Read the scenario and answer the questions.



You are about to see Sara for a new pregnancy. Her record shows that she was on WIC when she was pregnant with her daughter Lindsay, who is 14 months old. At intake, the front desk staff noted that Sara is not on OHP, but they made a referral. When Sara walks towards you in the waiting room, you notice she is scowling and very red-faced. Lindsay is with her and is crying. Sara smells strongly of cigarette smoke.

- What did you learn that applies to the prenatal assessment?
- Based on what you learned, what might you want to explore further?
- It is easy to make assumptions. What assumptions did you make that you would want to check?

## Step 2 – Assess ABCDE

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This is the science part of the assessment. During your conversation with a participant, you will use the data system questionnaire topics as a way to make sure you ask enough questions so that you feel like you have a complete picture of her health and normal feeding behaviors.

Risk Area	Assessment	Notes
<b>A</b> nthropometric	<ul style="list-style-type: none"> <li>• Take accurate height/length and weight measurements.</li> <li>• Record accurately</li> <li>• Review growth or weight gain grids</li> <li>• Interpret trends</li> </ul>	<ul style="list-style-type: none"> <li>• Use correct techniques for accuracy</li> <li>• Recheck if needed</li> <li>• Can use info from health care provider</li> </ul>
<b>B</b> iochemical	<ul style="list-style-type: none"> <li>• Collect accurate blood sample for hemoglobin</li> <li>• Record accurately</li> <li>• Interpret results</li> </ul>	<ul style="list-style-type: none"> <li>• Use correct techniques for accuracy</li> <li>• Recheck if needed</li> <li>• Can use info from health care provider</li> </ul>

Risk Area	Assessment	Notes
<b>C</b> linical	<ul style="list-style-type: none"> <li>• Collect info related to all topics identified in the data system questionnaires</li> <li>• Review health or medical concerns or diagnosis</li> </ul>	<ul style="list-style-type: none"> <li>• Review health history</li> <li>• Need health care provider diagnosis for specific medical conditions</li> </ul>
<b>D</b> ietary	<ul style="list-style-type: none"> <li>• Collect info related to feeding behaviors topics identified in the data system questionnaires</li> <li>• Open the conversation about feeding or eating habits</li> <li>• Attitudes (the participant/caregiver thoughts, feelings, or concerns)</li> <li>• Actions (what the participant/caregiver does)</li> <li>• Supplementation (prescribed, over-the-counter, traditional, herbal)</li> </ul>	<ul style="list-style-type: none"> <li>• Review diet assessment and note if whole groups of foods are avoided or limited</li> <li>• Compare intake to norms for category and age</li> <li>• Note development of feeding skills for infants and children</li> <li>• Consider feeding relationships and family mealtimes</li> </ul>
<b>E</b> nvironmental	<ul style="list-style-type: none"> <li>• Collect info related to all topics identified in the data system questionnaires</li> <li>• Review family health habits and living situation</li> </ul>	<ul style="list-style-type: none"> <li>• Consider family stressors, i.e. income, homelessness, domestic violence</li> <li>• Consider family resources, strengths and supports</li> </ul>

### Diet Assessment

Because WIC is focused on nutrition, we need to find out more about the **D**ietary part of the assessment. For the sake of simplicity, we have identified 3 basic topic areas to describe feeding behaviors: **attitudes, actions, and supplementation**. You need to make sure that you cover these 3 basic topic areas during your diet assessment.

Since you **do not** need to ask every question on the data system questionnaire, you will need to ensure your questions, and the participants' responses, fall into the 3 basic topic areas: attitudes, actions and supplementation. The question prompts in the data system act as a reminder to cover these topics. The questionnaires start by offering

broad open-ended questions, then move toward more specific questions and probes. As the participant talks, you will hear clues about potential dietary risks.

### **Attitudes**

This broad topic area addresses what the participant **thinks** or **feels** about their own or their child's food choices and overall diet.

When talking to a participant you might hear them talk about their appetite, or about how they feel about certain foods or entire food groups. They may express concerns about what their child is eating, or about getting the right nutrients. The participants' attitudes about food and feeding will give you your first clues about what to ask about next.

### **Actions**

This topic area relates to a participant's actions related to food. These actions address what the participant **does**, rather than what they think. They might talk about how often they eat, foods their children like or dislike, or what they eat or tries to avoid eating. The participant may talk about how, or what, they feed their children. The participant may also talk about foods typical of their culture or what they eat during cultural or religious events.

### **Supplementation**

When a participant shares information about any **vitamins** or **minerals** that have been prescribed by their health care provider for themselves or their child, we refer to this as supplementation. The participant may also talk about over-the-counter **vitamins**, **herbs**, **botanical remedies**, **herbal teas**, or items purchased at a health food store.

The specific information discussed with a participant about each of these broad topic areas (**actions**, **attitudes**, and **supplementation**) varies from one category to the next.

## Step 3 – Dig deeper

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### **Critical thinking**

Only after gathering **all** of the information will you be able to decide whether or not to assign a risk, and if your assessment is complete. Use these questions to determine if your assessment is complete:

- Think about the possible risks for the participant's category and whether you heard the caregiver speak about those topics.



- Think about what you have seen and heard. Ask yourself: does the information make sense? If not, why doesn't it make sense?
- Does the data you collected match the information you are hearing from the participant? (Does the objective data match the subjective data?)
- Is there any other information you need in order to complete the assessment?
- Do you need to ask any probing questions to learn more about a particular issue that was raised by the participant?
- **Have you missed any opportunities to learn more?**

### Using OARS to gather more information

To make sure you have a clear understanding of what was said, you will sometimes need to follow up to get more information from the participant. Using OARS skills will help you explore their concerns, motivations, expectations, strengths and challenges. Depending on the participant's answer to your initial question, you can use additional reflections, summaries, and probing questions to get more information.

**Open-ended extending probes** – Ask the participant to tell you more about what she just said.

“So, Jamie, what are your plans for introducing Tyson to solid foods?”

“What else have you heard about weaning from the bottle, Monique?”

“Sara, tell me more about the special diet you are on?”

**Open-ended clarifying probes** – Ask the participant to clarify what she said.

“Marge, tell me why you are pretty sure Maggie is allergic to milk?”

“Homer, what are your reasons for avoiding those foods?”

**Reflections as probes** – Restate what the participant said so they know you heard them. It encourages them to say more. Reflections work well to learn about concerns, motivations, and challenges.

“So, Simone, you don’t think Patrick will eat any vegetables.”

“You’re worried about what will happen when you start to wean Kira.”

**Redirecting probes** – Direct the participant to explore a different but related concern.

“Other than your concern about Tyler’s allergies, is there anything else that worries you about what he is eating?”

“What has the doctor told you about starting solids?”

**Summaries as probes** – Summarizing what you heard will allow the participant to clarify or add on to what was already said.

“You’ve mentioned grabbing the spoon, sitting up, and pointing at your food. What else are you noticing?”

“Common dinners are tacos, hot dogs, soup, and noodles. What else does Leo eat at dinner?”

**Close-ended questions** - Sometimes you need specific information in order to correctly assign a risk. In those situations, you may need to ask a close-ended question to get a specific answer.

“Is your child taking fluoride?”

### Read an example:

In time, you will be able to personalize the assessment questions, so that the process feels more natural for both you and the participant. You may be thinking, “How do I know when I need to ask more probing questions?” The answer is quite simple - once you get the information you need, move on! Let’s look at a scenario that demonstrates how it might look.

- Certifier:** Tai, now that you are pregnant, how is eating going for you? (Open-ended question)
- Tai:** Not so good.
- Certifier:** I’m sorry to hear that. Can you tell me a bit about your concerns? (Probing question)
- Tai:** Well, I can’t seem to keep anything down...I get sick all the time.
- Certifier:** That’s too bad. How are you dealing with being sick all the time? (Probing question)
- Tai:** I try to nibble on some saltines. That’s seems to be the only food I can stomach.
- Certifier:** So it sounds like you are not able to eat very much.  
[CPA mentally compares what Tai is saying to Tai’s reported weight gain and notes that her weight gain is a little lower than ideal.] (Critical thinking)  
What does your doctor say about your nausea and weight gain? (Probing question)
- Tai:** The doctor was the one that suggested the crackers. He said that this is pretty normal for the first part of a pregnancy and not to worry if I don’t gain much at first. He thinks I will make up for it later.
- Certifier:** I bet you were glad to hear that! So Tai, given how you are feeling, are you taking any vitamins to supplement your diet? (Close-ended question)
- Tai:** I have tried, but unfortunately, I usually end up throwing them up too.

### Learning activity

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For each of the following scenarios, develop a probe using an OARS skill that will allow you to dig deeper and gather more information from the participant. You can use the *Job Aid: Probing Questions* for ideas.

**Certifier:** “What do you like about the way you eat?”

**Participant:** “I eat a lot.”

**Certifier probe:**

**Certifier:** “What concerns do you have about the way your baby eats?”

**Participant:** “I worry that she is not eating enough.”

**Certifier probe:**

## Step 4 – Assign risks and document assessment

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After your conversation with the participant, you will use your critical thinking skills to confirm if you have:

- Identified all possible risks;
- Reviewed the risks listed in the data system and made sure they are correct;
- Confirmed that all the risks you identified are assigned in the data system; and,
- Documented the information needed to support any risks you have assigned.
  - This includes documenting what information you assessed that did not result in a risk.
  - Documentation may include putting answers to questions in the data system or entering a note.



## Step 5 – Decide on topics for nutrition-focused counseling

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Remember that one of the purposes of an assessment is to guide nutrition education. By doing a **complete** assessment you get a better understanding of any possible issues, and what is of greatest interest or concern to the participant. You will use the information you gathered to provide relevant participant-centered nutrition education.

- What topic(s) would you propose to the participant as a priority for nutrition-focused counseling?
- What anticipatory guidance would be appropriate?
- How could this information lead to next steps?
- What referrals or follow-up might be useful?

## Learning activity

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Read the following assessment scenario and answer the questions that follow.



**Certifier:** So Kaitlin, tell me about how your eating has changed since you became pregnant?

**Kaitlin:** Well, I used to have coffee and a bagel for breakfast and then just grab whatever during the day. Now that the baby is coming, I'm trying to make sure I eat more often throughout the day. I'm eating a lot more than I used to.

**Certifier:** That's great that you see the connection between your diet and the health of your baby! How well do you think the amount that you are eating is supporting the amount of weight you need to gain for this pregnancy?

**Kaitlin:** My doctor says he's happy with my weight gain, so I am just enjoying myself really.

**Certifier:** That's great. Yes, I see that your weight today does put you in the normal range of weight gain. So, what kinds of foods are you enjoying eating?

**Kaitlin:** I am really enjoying fruits... I can't get enough of them. Besides that, I am pretty much eating the same diet as before, just more of it.

**Certifier:** I sure am glad to hear you are enjoying fruits so much. Tell me, is there anything out of the ordinary you seem to be craving?

**Kaitlin:** Not unless you count chocolate.

**Certifier:** No, that seems pretty ordinary to me! Do you have anything else you would like to discuss today?

**Kaitlin:** Now that you mention it, I do miss my morning cup of coffee. Do I need to totally eliminate caffeine from my diet?

- Based on the dietary section of *Job aid: Selecting Risks – Pregnant*, would you consider this a complete assessment?
- What other dietary topics still need to be assessed? What do you think are Kaitlin's concerns, motivations, challenges, etc.?
- What probes were used to dig deeper? What additional probes would you use?
- What missed opportunities to learn more and dig deeper did you notice?

- What should be documented in the data system?
- What topic would you propose to Kaitlin as a priority for nutrition-focused counseling?

### Learning activity

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Arrange with your training supervisor to observe a certification. Use the ***Job Aid: What is a complete assessment?*** to follow the steps of the assessment.

- What risks were identified?
- How did the certifier know it was an appropriate risk?
- What was documented in the data system?

### Talk it over

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After completing this lesson and the certification observation, talk with your training supervisors about the learning activities and any questions you have.