

# Oregon WIC Training Orientation to WIC Module



# Orientation to WIC

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<https://www.surveymonkey.com/r/WICtrainingEval>



# 1-1 Welcome to WIC!

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Welcome to WIC! This module will help you learn basic information about how WIC works. Some areas of this module you will work through on your own. Other areas you will work through together with your Training Supervisor. There's a lot to learn about WIC! We encourage you to ask questions as they come up. Take your time and feel free to take notes as you read the module or take the online courses.

## The Orientation to WIC Course

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The paper (PDF) module you are reading now is just one part of how you start learning about the WIC program. To complete the Orientation to WIC course you must complete the following:

1. The [Orientation to WIC: 4 Key Services - Online Training Module](#) which is available on iLearn.
2. This **Orientation to WIC** staff training module, in paper or online PDF format.
3. The [Introduction to Caseload - Online Training Module](#) which is available on iLearn.
4. The [Orientation to WIC Posttest](#) which is available on iLearn. To earn credit for completing Orientation to WIC, this posttest must be completed and passed within 30 days of your starting date.

## Items Needed

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- Access to a computer and the internet.
- An iLearn account.
- Attachments – Access using the online links or located at the back of this module.
- Job Aids – Access using the online links or located at the back of this module.
- Access to the [Oregon WIC Training Modules and Online Courses](#) webpage to access the online training modules (Oregon WIC website > Staff training modules).
- Access to the [WIC Policy and Procedure Manual](#) to read the policies. (Oregon WIC website > Oregon WIC policy and procedure manual)



**NOTE:** The main page of the Oregon WIC website can be reached at <https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/WIC/Pages/index.aspx>



# 1-2 Who works at WIC?

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Items Needed – available at the end of the module or by clicking the link

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- [Job Aid: Local WIC Staff](#)

## WIC Policies

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- [WIC Policy 660](#) – Competent Professional Authority: Requirements
- [WIC Policy 435](#) – Staffing Requirements

## Objectives

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After completing this lesson, you will be able to:

- Identify the WIC staff at your clinic.
- Briefly describe the job of each member of your staff.
- Identify your responsibilities at WIC.
- Describe how the state WIC office helps local agencies.
- Identify when to call the state WIC office for help.
- Describe your clinic's service area.

## Overview

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You may wonder who is on the WIC staff, both at your clinic and at the state WIC office. What do different members of the staff do? Where do you fit in? Who should you contact when you have questions or problems?

## Where does your WIC program fit in?

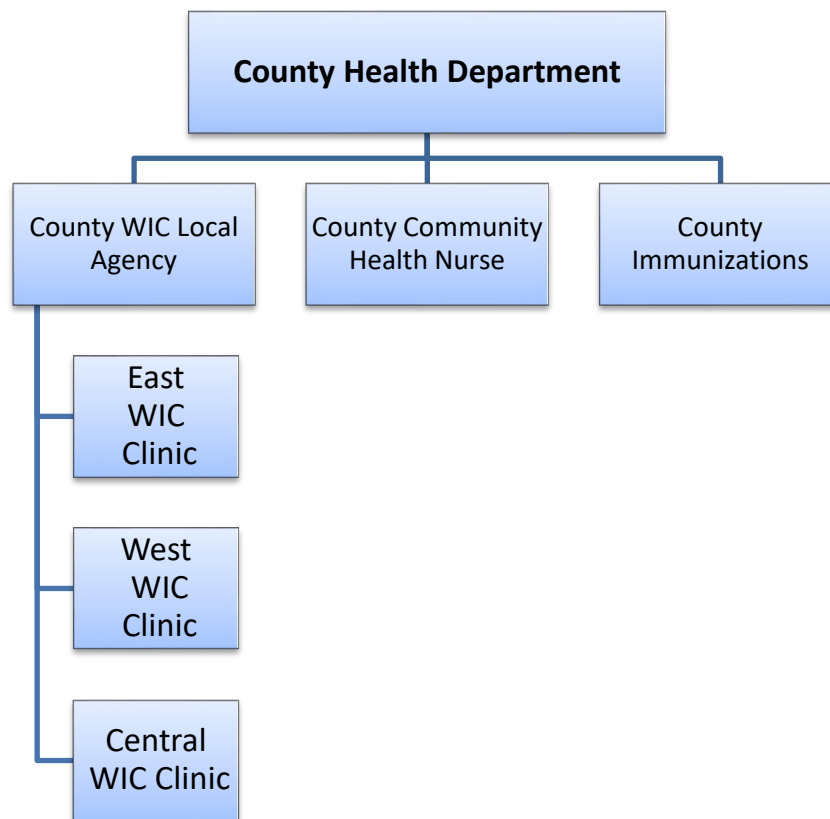
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Every WIC program in Oregon is part of a larger organization. Your program may be one of several programs within your county health department. Or, your clinic

may be one of the services provided by a tribal organization, Head Start program or migrant health clinic.

There may also be more than one WIC clinic site within your organization. We call the main office of your WIC program the **WIC local agency** and each site a **WIC clinic**. Some local agencies have both permanent and satellite clinic sites.

- **Permanent clinic sites** are regularly staffed and equipment stays in the office.
- **Satellite clinic sites** are set up temporarily in borrowed space (churches, offices, other health clinics) and equipment is brought to that location just for the day.



Every WIC program has a **service area** – which is the particular group of people they are designated to serve. For example, county WIC programs serve the people in their county and tribal organizations serve tribal members. There are a few special WIC agencies that serve people from more than one county or are sponsored by other organizations. WIC works hard to make WIC services accessible to everyone.

## Learning Activity

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1. Talk to your supervisor or training supervisor about how your WIC program is organized.

- What is your agency's service area?
- Do any other WIC programs serve participants in your area?
- Are you part of a larger organization?
- Do you have more than one clinic site?
- Do you have permanent and satellite sites?



## Who works at your WIC clinic?

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Many different people, with a variety of skills, work together to provide WIC services. All local WIC programs have a WIC coordinator and at least one nutritionist. They also have Competent Professional Authorities (CPAs), clerks, receptionists, and sometimes health assistants. The number of WIC staff usually depends upon the number of WIC participants at the clinic.

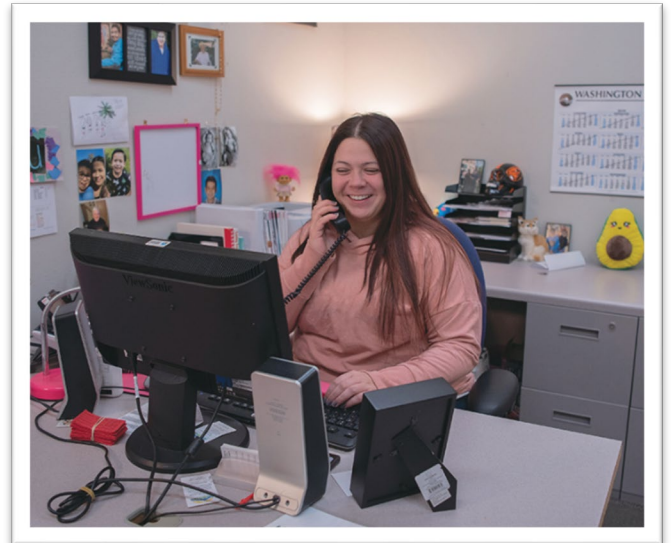
In some clinics, one person may do more than one job. For example, the nutritionist may also be the WIC coordinator. The WIC coordinator may also do the job of the breastfeeding coordinator and training supervisor. Some clinics use a health assistant, others do not. Some WIC clinics have breastfeeding peer counselors. As you read the following descriptions of WIC jobs, think about your job and where you fit in.



## Clerk/Receptionist

A WIC applicant's first contact with the program is usually with the clerk or receptionist. The clerk's responsibilities may include:

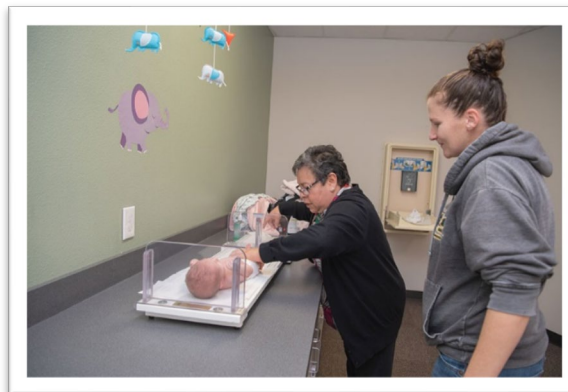
- Helping families through the application process.
- Screening families for eligibility.
- Scheduling and rescheduling classes and appointments.
- Promoting breastfeeding and nutrition education.
- Answering phone calls.
- Providing referrals to community resources.
- Offering voter registration.



## Health Assistant

Some larger clinics have a paraprofessional health assistant to help with WIC appointments. The health assistant's responsibilities may include:

- Monitoring clinic flow.
- Bringing participants to the counseling area.
- Taking height and weight measurements.
- Testing hemoglobin.



## Competent Professional Authority

Competent Professional Authority (CPA) is the official name for the person on your staff who determines if people are eligible for WIC based on their nutrition risk factors. CPAs may also be called certifiers or nutrition assistants.

The CPA's responsibilities may include:

- Determining whether or not an applicant qualifies for WIC.
- Documenting medical and nutrition risk factors.
- Working with participants to identify their next steps and a quarterly nutrition education opportunity.
- Providing nutrition-focused counseling based on participant interests and concerns.
- Providing breastfeeding education and support.
- Assigning a food package.
- Facilitating nutrition education groups.
- Making referrals.
- Taking height and weight measurements.
- Testing hemoglobin.
- Issuing food benefits.



There are two types of CPAs – professional and paraprofessional.

**Professional CPA:** A professional CPA may have a bachelor's or master's degree in a health profession, such as nutrition, nursing or health education. A professional CPA may be a physician, physician's assistant, registered dietitian or nurse.

**Paraprofessional CPA:** A paraprofessional CPA has at least a high school diploma or equivalent. The CPA is trained by WIC to learn how to certify and counsel participants. CPAs are supervised by a nutritionist or other health professional.



## Nutritionist

Every WIC clinic has a nutritionist. The nutritionist is the local agency's nutrition expert. A nutritionist has an advanced degree in nutrition, and is a Registered Dietitian Nutritionist (RDN) or an Oregon Licensed Dietitian.

The nutritionist's responsibilities may include:

- Certifying and counseling high-risk participants.
- Answering detailed nutrition questions.
- Writing nutrition care plans for high-risk participants.
- Training staff on nutrition topics.
- Facilitating nutrition education groups.



## Designated Breastfeeding Expert (DBE)

Every WIC agency has a Designated Breastfeeding Expert (DBE) who has advanced training in breastfeeding support. This breastfeeding specialist has completed advanced lactation training and may be an International Board Certified Lactation Consultant (IBCLC). The Designated Breastfeeding Expert:

- Provides education to help prepare participants for breastfeeding.
- Answers questions from participants about breastfeeding.
- Helps participants who are having breastfeeding challenges.

The Designated Breastfeeding Expert may also be your clinic's **breastfeeding coordinator**. The breastfeeding coordinator:

- Facilitates breastfeeding groups.
- Coordinates breastfeeding promotion activities.
- Creates a clinic environment that supports breastfeeding.
- Coordinates the agency's breast pump program, or designates another staff member to fill the role of **breast pump coordinator**.



## Breastfeeding Peer Counselor

Some agencies have breastfeeding peer counselors who provide basic breastfeeding information and encouragement to pregnant and breastfeeding WIC mothers. Peer counselors have personal experience with breastfeeding and have participated in WIC themselves.

## WIC Coordinator

The WIC coordinator is the leader of the WIC clinic. In some clinics, the WIC coordinator is also the nutritionist.

The WIC coordinator's responsibilities may include:

- Making sure the WIC clinic runs smoothly.
- Supervising the WIC staff.
- Managing the WIC caseload (the number of participants on WIC).
- Completing required paperwork for the state WIC office.
- Communicating with the state office and distributing information from the state office to the rest of the staff.
- Making sure that program regulations are followed.
- Answering questions and making decisions.
- Managing the appointment schedule.
- Managing the WIC clinic flow.



## Training Supervisor


You've already met your training supervisor! The training supervisor is a professional CPA and may also be the WIC coordinator. The training supervisor's responsibilities include:

- Coordinating the training of the local WIC staff.
- Helping staff as they complete the WIC Training Modules.



## Learning Activity

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1. Using the [Job Aid: Local WIC Staff](#), make a list of the staff in your clinic and note their jobs.
  - Work together with a coworker, your supervisor or training supervisor on this activity.
  - Do you have someone listed for all of the jobs you read about in this section?
2. Talk to your supervisor or training supervisor about your job at WIC. Where do you fit into the WIC team?
3. If you work in a clinic that is part of a larger organization, talk to your supervisor or training supervisor about how WIC fits into the organization. Are there any people in the larger organization whom you may need to contact?

## Who works at the State WIC office?

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The state WIC office has a wide variety of people on staff. They are experts on:

- Nutrition
- Clinic management
- Breastfeeding
- Health education
- WIC's data system
- Budget management
- Document layout and publishing
- Outreach and referrals
- Vendor (Store) relations
- Training
- WIC policies and procedures

The state WIC office staff can answer questions such as:



NOTE: A state nutrition consultant is assigned to each local agency. Your state nutrition consultant will answer your general nutrition and policy questions.

## Learning Activity

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1. Go to the [WIC website](#):

- Bookmark this site on your computer.
- Under the heading **Learn More about Oregon WIC**, click **Contact Us** to see the contact information for the state WIC office. Scroll down to see the staff who work at the state WIC office.

2. Talk with your supervisor or WIC coordinator about your job and in which circumstances you might need to contact the state WIC office.

## Skill Check – Self-Evaluation

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1. Who is your WIC clinic receptionist? Is there more than one?
2. Who in your clinic would answer questions about breastfeeding?
3. Who in your clinic would answer questions about breast pumps?
4. Who in your clinic would answer questions about the data system?
5. When should you contact the state WIC office? What is the phone number?





# 1-3 Confidentiality

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## Items Needed

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- WIC Program [Employee Signature Form](#) for your local agency.

## WIC Policies

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- [WIC Policy 450](#) – Confidentiality
- [WIC Policy 596](#) – Program Integrity: Acknowledgement of Employee Responsibilities

## Objectives

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After completing this lesson, you will be able to:

Follow appropriate procedures for confidentiality of WIC information.

## Confidentiality and Acknowledgement of Employee Responsibilities

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As a WIC employee you will regularly handle participants' personal information. Keeping their information private and confidential is an important part of your job.

There are two key points to confidentiality at WIC.

1. Do not release information from a participant's file without consent.
2. Maintain the privacy of WIC participants at all times.

## Learning Activity

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1. Read [WIC Policy 450](#) – Confidentiality.
2. Read [WIC Policy 596](#) – Program Integrity: Acknowledgement of Employee Responsibilities.
3. Read other local policies on confidentiality as requested by your training supervisor.
4. In the presence of your supervisor, read and sign the **WIC Program Employee Signature Form** provided by your local agency.



## Skill Check – Self-Evaluation

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1. What are three examples of a breach of confidentiality?
2. How will you keep the information on your computer private?



## 2-1 Nutrition Education

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Items needed – available at the end of the module or by clicking the link

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- [Job Aid: WIC Groups](#)

### WIC Policies

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- [WIC Policy 810](#) - Nutrition-Focused Education and Counseling
- [WIC Policy 820](#) - Quarterly Nutrition Education Contacts
- [WIC Policy 830](#) - Nutrition Counseling and Services for High-Risk Participants
- [WIC Policy 840](#) - Documentation for Nutrition-Focused Education and Counseling
- [WIC Policy 850](#) - Nutrition Services Plan
- [WIC Policy 880](#) - Referrals

### Objectives

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After completing this lesson, you will be able to:

- Explain the purpose of nutrition education in WIC.
- List two types of WIC nutrition education options offered at your agency.
- Explain why marketing nutrition education is important.
- Describe your role in promoting nutrition education.

### Overview

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Nutrition education (NE) is the cornerstone of the WIC Program and is the primary service that distinguishes our program from other nutrition assistance programs like SNAP. Participants, just like everyone else, have busy lives. Finding the time to take advantage of the nutrition education services offered by WIC may seem overwhelming for families. WIC staff can market nutrition education in a way that helps participants understand the value of participating in this service.

## Nutrition education

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Nutrition plays a critical role during stages of rapid growth and development, such as pregnancy, infancy, and early childhood. The purpose of nutrition education (NE) in WIC is to improve the health outcomes of participants.

WIC staff offer information about nutrition to participants and then talk about how to incorporate this information into their lives. This service has the potential to positively impact the lives of WIC participants and their families for years to come! Participants are offered a nutrition education contact at least once every three months, which means WIC has many opportunities to provide meaningful nutrition education to participants.

WIC aims to offer nutrition education opportunities that meet the needs of the participant. Since our participants have diverse needs, WIC offers many different types of nutrition education.



## Types of nutrition education

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Local agencies throughout the state may offer nutrition education in different ways. Your agency may offer some of these types of nutrition education.

### Individual

The individual appointment involves a WIC staff member talking one-on-one with a participant to provide nutrition-focused counseling. The conversation is usually face-to-face and is tailored to focus on the specific nutrition interests or concerns of the participant.



## **High risk**

High risk visits are a type of individual appointment where a participant talks with the WIC nutritionist. These participants have more serious health concerns and require more intensive nutrition counseling.

## **Group**

Group nutrition education is facilitated by a WIC staff person and is offered to multiple participants at once. A variety of group topics may be offered. Common group topics include: infant feeding, breastfeeding or prenatal nutrition. Ideally, group education is offered in a participant centered way, where everyone can discuss topics and share questions and knowledge with the group. This allows participants to gather information from each other in a supportive environment where their culture, prior experience and personal concerns are acknowledged and respected.

Local agencies also have the option of collaborating with community experts from partnering agencies. Certain requirements must be met for group sessions which are led by non-WIC staff.

## **Online lessons**

For those who are eligible, online lessons provide nutrition education for participants who may not be able to attend individual or group sessions. Online nutrition lessons can be completed anywhere or anytime the participant can access the internet.



## **Self-paced lessons**

Self-paced lessons provide nutrition information in a written format and are completed in the clinic. These lessons are an option for participants who are not high risk who miss their WIC appointment.

## **Non-WIC nutrition education provided off-site**

Local agencies may choose to enter into agreements with other organizations that provide nutrition education away from the WIC clinic. Off-site nutrition education must be set up ahead of time, meet WIC requirements and be provided at no additional charge to WIC participants. Examples of off-site WIC nutrition education are:

- A breastfeeding class attended as part of hospital birthing classes
- Expanded Food and Nutrition Education Program classes offered through the Oregon State University Extension program
- Head Start parenting classes that address nutrition.

Local agencies may offer all or just a few of these types of nutrition education appointments.

**NOTE:** For more information refer to the Oregon WIC Nutrition Education Policies 810, 820, 830 & 840 found online at <https://www.oregon.gov/OHA/PH/HEALTHYPEOPLEFAMILIES/WIC/Pages/wicpolicy.aspx>

## Learning activity

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1. What types of nutrition education are offered at your clinic?
2. Using the [Job Aid: WIC Groups](#), write down the types of group education offered at your WIC clinic. Ask a coworker, supervisor or training supervisor for help.
3. If you are a certifier, talk to your training supervisor about observing group sessions or reviewing any online or self-paced lessons that are offered by your agency.



## Marketing nutrition education

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WIC can offer outstanding nutrition education opportunities, but its effectiveness is limited if no one comes. Marketing has the potential to improve participants' involvement in WIC nutrition education. Marketing nutrition education means we try to help participants see how nutrition education is worth the effort.



Adults only want to learn about things that are relevant to them. WIC wants to connect nutrition education to the needs and wants of participants. Marketing nutrition education helps the participant see the value of it. Participants will take advantage of nutrition education opportunities when they recognize how they and their families can benefit from it.

For some people, the term “marketing” means advertising or a pushy salesperson. For others, marketing means outreach or marketing the program to those who could potentially benefit from it. Basically, marketing **is** matching a product to the needs of the consumer. In WIC, the product is nutrition education and the consumers are the WIC participants.

## Ways to market nutrition education

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A valuable strategy for marketing is creating a positive image of your nutrition education services—from a participants’ point of view. When creating that image, base it on what participants tell you is important to them. This image can motivate participants to respond to nutrition education opportunities positively. When WIC staff communicate that nutrition education is fun, useful and valuable, WIC participants will be likely to view it that way as well. Marketing a positive image includes consideration of: Place, Product, Price and Promotion.

### **Place**

The place is where the education happens. Is this environment friendly to the participant? Is it noisy or distracting? How can you make the environment comfortable and inviting to the participant?

The location for nutrition education doesn’t have to be *ideal* for the education to be effective. However, making the education accessible to your participants and creating an inviting environment can encourage participants to take part. Since many WIC agencies now offer multiple types of nutrition education, talk with the participant to try and find a place that works for them.

### **Product**

Nutrition education opportunities are the product. A good product is one that matches the needs of the participant. Listening closely to participants and offering the nutrition education that is appropriate for their situation will go a long way in marketing this product.

### **Price**

WIC participants do not pay for nutrition education. However, coming to an appointment or attending a group has a “cost” for them in time and effort, and competes with other work, school or family activities. Those costs can keep participants from taking part in nutrition education. To minimize costs to the participant, try coordinating nutrition education with other clinic visits, if possible. Schedule nutrition education at times and places that are most convenient for participants.

## Promotion

Promotion is letting participants know how they will benefit if they attend an appointment or group session. Like anyone else, participants need to know that the education will be useful to them in order for them to want to participate. To promote nutrition education effectively, the whole staff need to be involved in the marketing process.

### Learning activity

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Compare these responses.

Column A	Column B
<b>“You have to see the WIC nutritionist today.”</b>	<b>“You have the opportunity to see the WIC nutritionist today.”</b>
<b>“I think you should sign up for the breastfeeding class.”</b>	<b>“It looks like there are a few open spots in the breastfeeding class. Other moms tell me they hear interesting and helpful information. How does that sound to you?”</b>

1. Which column projects a more positive image?
2. How would you feel if someone were to use these statements with you?
3. Underline the key words that made a difference in the tone of each statement.



## Your role in marketing nutrition education

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The nutrition education services WIC provides are an opportunity for participants to learn new information and skills and this is one of the many benefits of the WIC program. The success of these nutrition services depends on the attitude of the entire WIC staff, including: clerks, certifiers, nurses, health educators and WIC coordinators. When everyone positively promotes education opportunities, participants are encouraged to participate in nutrition education, rather than attend because it is a “requirement.”

### **Clerks**

Clerks set the stage for all participant encounters. Clerks are the first contact a participant has with the WIC program. How that initial interaction goes has a huge impact on how open the participant is to WIC and nutrition education. Clerical staff are encouraged to greet participants warmly and with respect, whether in person or on the phone.

In most agencies, clerks will be responsible for scheduling and re-scheduling nutrition education, both on the phone and in person. During these conversations, it is ideal for clerical staff to communicate that nutrition education is important, worthwhile and fun. When participants call with questions about education, clerical staff will direct them to a certifier, health professional or group session. The words clerical staff use set the tone for this next interaction.



### **Certifiers, nurses, dietitians and health educators**

Certifiers, nurses, dietitians and health educators can link what the participant has been discussing at the certification or follow-up visit to the most relevant education option available. Matching the participants’ needs and desires with what we offer is at the heart of participant centered services.

Think about the participants' situation. Is this a new parent, or a long-time WIC participant? Is this a parent with several small children, or a newly pregnant participant? A parent whose child is growing well, but is worried about his mealtime pickiness might best be served in a group about toddler feeding or picky eating.

The certifier works with the participant to select the nutrition education that is most appropriate for the participant.

## Learning activity

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1. Circle the statement that applies what the participant has discussed with the nutrition education offered.



**Statement A:** “We’d like you to try to come to one of these classes sometime in the next 6 months. Which one would you be interested in?”

**Statement B:** “I think the group Infant Feeding, offered next month, will be very helpful for you. We talked about what kinds of solid foods and finger foods would be good for Julia, and this group will give you lots of practical tips for feeding your baby. It will also give you an opportunity to hear how other mothers have handled their babies’ feeding. Will that work for you?”

2. Why is it important to match the nutrition education offered to the participants’ interests?
3. Observe a coworker promoting and/or scheduling nutrition education for at least three participants.



## Skill check – self-evaluation

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1. What is the purpose of nutrition education in WIC?
2. What are two types of WIC nutrition education options offered at your agency?
3. Why is marketing nutrition education so important?
4. Talk with your training supervisor about your role in marketing nutrition education.





## 2-2 Breastfeeding Promotion and Support

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### Objectives

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After completing this lesson, you will be able to:

- Describe the purpose of breastfeeding promotion.
- Describe the types of breastfeeding support WIC offers participants.

### Overview

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Human milk is the perfect food for babies, and breastfeeding is good for mothers, families and communities. WIC promotes breastfeeding as the norm for infant feeding. WIC provides ongoing guidance to help moms succeed with breastfeeding. Increasing breastfeeding duration leads to healthier moms and babies. The goal of breastfeeding promotion is to help more mothers to exclusively breastfeed for one year and beyond, as recommended by the American Academy of Pediatrics and the World Health Organization.

Many people are not aware of the emphasis WIC places on breastfeeding promotion, since WIC also provides infant formula. WIC's priority of promoting breastfeeding is reflected in program policies, activities, trainings, participant education and clinic environments.

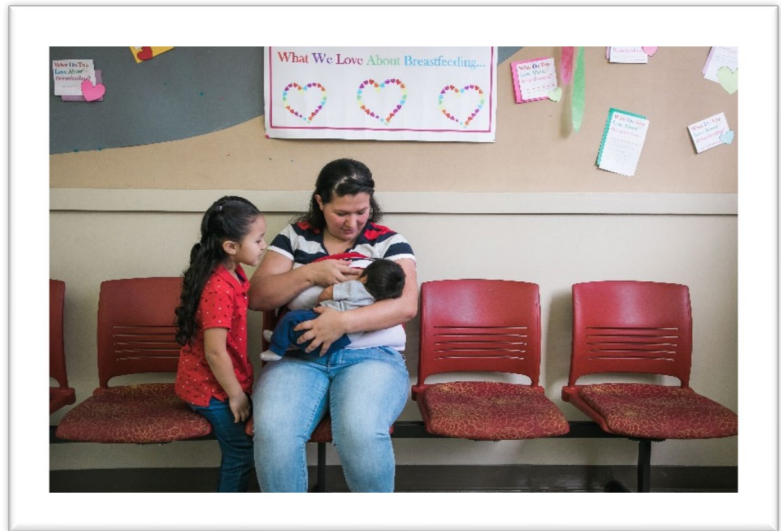
Breastfeeding education and support is offered to all pregnant and breastfeeding participants, including:

- Breastfeeding information before baby is born
- Breastfeeding support groups
- Breast pump information
- Breastfeeding experts to help with breastfeeding challenges
- Breastfeeding peer counselors

## Breastfeeding education

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WIC helps parents to prepare for breastfeeding prenatally, so that breastfeeding gets off to a good start once baby arrives. WIC continues to provide guidance during the early weeks and months, offering answers to questions, and solutions to any breastfeeding difficulties that arise. All WIC agencies provide individual counseling and breastfeeding education and support both prenatally and during the postpartum period.



In **prenatal education**, the focus is on how the body is preparing for breastfeeding, planning for baby's birth, the value of skin-to-skin contact, the importance of early, frequent feedings, establishing good milk production and what to expect in the early days at home.

**Postpartum education** is provided at a time when the baby and parents are getting to know each other. While breastfeeding is a skill that babies are born with, it does take some practice. WIC provides information on infant growth and development, and helps parents to better understand their baby's behavior and how to respond appropriately to their baby's cues.

In addition to one-on-one support, some agencies offer **breastfeeding groups** for breastfeeding families. WIC may also provide breast pumps to moms who need them for medical reasons, or for moms returning to work or school. If difficulties arise with breastfeeding, most agencies have staff with specialized training in breastfeeding support to help.

## Breastfeeding peer counseling

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The state WIC office provides special funding to a number of local agencies to provide Breastfeeding Peer Counseling (BFPC) services. The Peer Counseling program teams breastfeeding peer counselors with International Board Certified Lactation Consultants (IBCLCs), and is in addition to the standard breastfeeding education and support that all pregnant and breastfeeding parents receive in WIC. Services focus on preventing breastfeeding problems by working with pregnant participants before the baby is born to build self-confidence for parenting and breastfeeding. BFPC staff provide support through group, individual and phone contacts, and continue to provide support in the postpartum period.

## Learning activity

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1. Interview your breastfeeding coordinator to discover what your agency is doing to promote breastfeeding.
2. Ask your training supervisor what types of breastfeeding support are offered at your clinic.
3. Who do you refer participants to if they have breastfeeding issues or concerns?
4. If your agency offers breastfeeding peer counseling, talk to your breastfeeding peer counseling coordinator to learn how this works in your agency.



## Skill check – self-evaluation

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1. What is the purpose of breastfeeding promotion?
2. What are the types of breastfeeding support your agency offers participants?





## 2-3 WIC Foods

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Items Needed – available at your clinic or by clicking the link

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- Handout: [WIC Food List](#)

### WIC Policies

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- [WIC Policy 770](#) - Authorized Foods

### Objectives

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After completing this lesson, you will be able to:

- Describe why each food is provided by WIC.
- Describe the basic food packages available to each category of participant.
- State how your clinic delivers the Farm Direct Nutrition Program to WIC participants.

### Overview

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WIC foods may be the service that first attracts potential WIC participants. WIC foods are selected because they provide specific nutrients. The WIC program is different than SNAP (Food Stamps) because WIC participants can buy only specific, nutritious foods. The participant uses a special type of debit card called an electronic benefits transfer (EBT) card, or eWIC card, at WIC authorized stores to pay for the food.

### What foods does WIC provide?









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The USDA provides regulations for all states on the food categories and specific food products WIC can provide. The Oregon state WIC office uses these criteria to select the foods for our authorized Food List. The authorized foods are nutritious and help improve the diets of WIC participants.

WIC provides foods that are high in specific vitamins and minerals. WIC foods are only meant to supplement the diet, not provide all the food and nutrients that participants need.

## WIC Foods

These are the food categories offered to WIC participants and some of the health benefits they provide:

	Milk or Milk Substitute	➔	Calcium Vitamin D Protein	➔	Builds strong bones and teeth; builds and preserves body muscle and tissues.
	Yogurt	➔	Calcium Vitamin D Protein	➔	Builds strong bones and teeth; builds and preserves body muscle and tissues.
	Tofu	➔	Calcium Protein	➔	Builds strong bones and teeth; builds and preserves body muscle and tissues.
	Eggs	➔	Protein	➔	Builds and preserves body muscle and tissues.
	Canned or Dried Beans & Peas	➔	Iron Protein	➔	Builds strong blood; builds and preserves body muscle and tissues.
	Peanut Butter	➔	Iron Protein	➔	Builds strong blood; builds and preserves body muscle and tissues.
	100% Juice	➔	Vitamin C	➔	Helps the body absorb iron.
	Cheese	➔	Calcium Protein	➔	Builds strong bones and teeth; builds and preserves body muscle and tissues.

	Cereal →	Iron →	Builds strong blood.
	Canned Fish →	Protein →	Builds and preserves body muscle and tissues.
	Whole Grains →	Fiber Vitamins →	Promotes digestive health and builds healthy bodies.
	Fresh or Frozen Fruit and Veggies →	Fiber Vitamins →	Promotes digestive health and builds healthy bodies.
	Baby food: Fruit & Veggies →	Vitamins →	Promotes healthy eyes and bodies and helps the body absorb iron.
	Baby food: Cereal →	Iron →	Builds strong blood.
	Baby food: Meat →	Iron Protein →	Builds strong blood and builds body muscle and tissues.
	Infant Formula →	Nutritionally complete for babies who aren't breastfeeding.	

## What is a WIC food package?

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A food package is the combination of foods that WIC participants receive based on their nutrition needs. A variety of food packages are available for different categories of participants. During certification, the CPA assigns the food package that will best meet the needs of the participant. The following sections describe the foods that are usually included in food packages assigned to each category of participant.

**NOTE:** You will learn more about the WIC food package in the Food Package Module.

### Infants

WIC promotes breastfeeding as the healthiest food for babies. WIC provides breastfeeding counseling and support to help women continue to breastfeed. WIC can also offer breast pumps to women who need to return to work or school. WIC provides formula for non-breastfeeding and some breastfeeding infants.



In their 7<sup>th</sup> month, infants are also offered infant foods. In their 9<sup>th</sup> month, half of the baby food fruit and vegetables can be replaced with cash benefits for fresh fruit and vegetables. This is an option if the infant is developmentally ready and the parent is interested.

WIC maintains contracts with formula companies that requires us to provide specific brands of infant formulas. These are called the **bid formulas**. Infants who cannot tolerate the bid formulas can receive a different brand of formula with medical documentation from their health care provider.



## Children

Children are offered foods that help promote good growth and a healthy diet.

These foods include:



**NOTE:** Whole milk yogurt may be assigned to 13 to 23-month-old children. Children 24-60 months receive low-fat/nonfat yogurt in the standard food package.

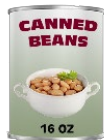
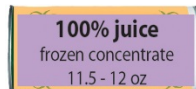
## Pregnant Women

Pregnant women are offered foods to help promote a healthy pregnancy. The food categories that pregnant women receive are the same as for children. Pregnant women receive a larger quantity than postpartum non-breastfeeding or some breastfeeding women.



## Fully Breastfeeding Women

Women who are fully breastfeeding (not using formula) receive extra WIC foods to meet their increased nutrition needs. They receive more foods than pregnant or mostly breastfeeding women.



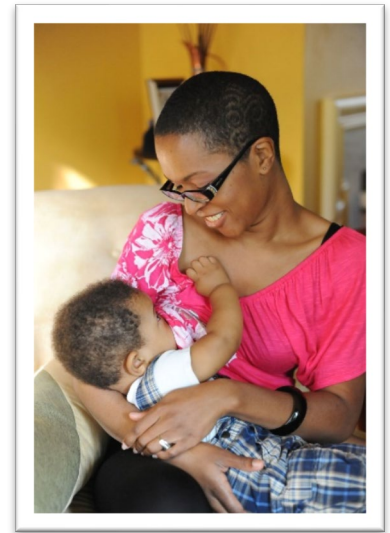


## Mostly Breastfeeding Women

A breastfeeding mother who is up to one year postpartum, whose infant receives a limited amount of infant formula from WIC, is considered mostly breastfeeding. Mostly breastfeeding women receive the same foods and quantities as pregnant women.

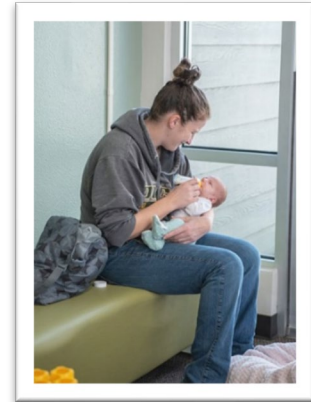
## Some Breastfeeding Women

A breastfeeding woman who is up to one year postpartum, and whose infant receives a significant amount of formula from WIC, is considered some breastfeeding. Some breastfeeding women are certified to participate in the WIC program for one year, but women in this category are only able to receive food packages until 6 months postpartum. From 6 months to 1 year postpartum, women in this category can participate in all other WIC services, such as nutrition education and the Farm Direct Nutrition Program. Some breastfeeding women get fewer types of foods and smaller quantities than pregnant women.



## Non-Breastfeeding Postpartum Women

A woman through 6 months postpartum, whose infant receives the maximum amount of formula from WIC, is considered non-breastfeeding. This category of participant receives the same foods and quantities as the some breastfeeding women.



## Alternative Food Needs

Food packages can be issued which meet the unique needs of certain participants. The certifier assigns a non-standard package after assessing the participant's nutrition needs. Some of these food packages may include:

- Lactose-free milk
- Goat milk
- Soy beverage
- Powdered or evaporated milk.
- Tofu



## The WIC Food List

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To help participants shop at the store, WIC provides each person with a WIC Food List which describes what foods are authorized to be purchased with their eWIC card. The foods on the WIC Food List were chosen by a team from the state WIC office. They made the choices based on several factors, some of which include:

- All foods must meet the USDA guidelines for nutrition content.
- Cereals must be high in iron and low in sugar.
- Juices must be 100% juice and be high in vitamin C.
- Foods must be low cost to allow WIC to serve more participants.
- Results of local WIC staff input and participant preference surveys.
- Milk substitutes must be allowed by the USDA and have enough calcium and other vitamins and minerals.

## Learning Activity

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Using the [WIC Food List](#), answer the following questions:



1. Can participants buy apple cinnamon flavored instant oatmeal packets?
2. What size eggs can participants buy?
3. Can participants buy Honey Nut Cheerios?
4. Can participants buy chocolate milk?
5. Can participants buy pepper-jack cheese?
6. Can participants buy goat milk? Can participants buy almond milk?
7. Do participants have to buy juice with added calcium?
8. Can participants buy organic baby carrots?

## Oregon WIC Farm Direct Nutrition Program (FDNP)

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Some WIC participants also receive special checks to purchase fresh Oregon-grown fruits, vegetables and herbs at authorized farmers markets and farm stands in Oregon during the growing season (June-November). These families also receive information on how to prepare fresh produce. The checks and information are provided by WIC staff. The program is also called the Farmers' Market program.



### Learning Activity

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Ask your supervisor or training supervisor about how your clinic delivers the Oregon WIC Farm Direct Nutrition Program to WIC participants.



### Skill Check – Self-Evaluation

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Pretend you are talking to a new WIC participant. You can practice aloud to yourself or with a friend or coworker.

- Explore what the participant knows about the approved WIC foods.
- Ask permission to offer additional information about each WIC food.
- Explore what the participant knows about the Farm Direct Nutrition Program.
- Ask permission to offer additional information about the Farm Direct Nutrition Program.







## 2-4 Referrals

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Items Needed – available at the end of the module or by clicking the link

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- [Job Aid: Referrals](#)
- [WIC Policy 481](#) - Immunization Screening and Referral Protocol
- [WIC Policy 880](#) - Referrals

### Objectives

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After completing this lesson, you will be able to:

- Describe your role in referring WIC participants.
- List the three required referrals for WIC.
- Identify at least two health or social service agencies that your program commonly refers participants to.
- Describe the importance of community partnerships and how to access their services.

### The importance of referring

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Connecting families with other services is the fourth key service of WIC. Many families come to WIC with needs beyond nutrition education, breastfeeding support and supplemental foods. It is our job to link participants with resources outside of WIC so they can be healthy and safe. Offering meaningful and appropriate referrals at the right time can help families get the support they need to be healthy.

### Your role in referring

---

Everyone plays a part when it comes to referring WIC participants to outside resources. Clerical staff may make referrals to general statewide resources for health care and financial assistance. Certifiers may make other referrals based on the need(s) that arise during the conversation with the participant.

To effectively refer WIC participants to outside programs, you will need to know what health and social services are available in your area. In some cases, the referrals will be to statewide programs, others to local services.

Listed below are a few examples.

### Health care service referrals:

- Health care providers
- Family planning or community health nurses
- Oregon Health Plan (OHP)/Medicaid
- Lactation Consultants
- Drug and alcohol counseling
- Smoking cessation counseling
- Mental health clinics



### Social service program referrals:

- Supplemental Nutrition Assistance Program (SNAP), formerly known as food stamps
- Head Start
- Food banks
- Emergency shelters and housing
- Temporary Assistance for Needy Families (TANF)
- Domestic violence programs
- Parenting classes
- Teen parent program



The 211info center is a centralized referral resource available to everyone in Oregon.



### Conversation examples:

Here are some examples of examples of what participants might say and what could be a possible referral:

WIC Participant Says:	Possible Referral:
"We got evicted and have no place to go..."	Housing resources
"We run out of food every month. WIC and SNAP are just not enough."	Emergency food bank
"I know we should get his teeth checked, but we don't have a dentist."	Dental clinic
"We just moved to Oregon and have no health insurance."	Oregon Health Plan
"I just found out I am pregnant, now what should I do?"	Prenatal care/ Oregon Mothers Care
"I'm having trouble paying for childcare."	Head Start/Department of Human Services - Day Care Assistance
"Sometimes he gets angry and pushes me."	Domestic violence
"I know I shouldn't smoke, but I just can't seem to quit."	Smoking cessation/Quit line
"I don't have time during the day to apply for food assistance."	Supplemental Nutrition Assistance Program (SNAP) online application

Note: Accepting referral information may not be easy for some participants, as there may be feelings of embarrassment or shame about receiving help. Being sensitive to this and asking permission before offering referral information will go a long way towards making WIC participants feel comfortable.

## Required Referrals for WIC

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All WIC staff are required to provide referrals, as needed, to these three programs.

### 1. Oregon Health Plan (OHP)/Medicaid

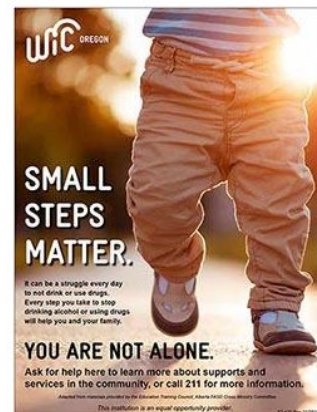
WIC staff are required to provide written OHP information at certification appointments if participants are not currently enrolled in OHP. Written information could include the OHP customer service phone number, a 211info referral card with OHP written on it, or a locally developed OHP information sheet.

### 2. Immunizations

WIC staff are required to screen WIC infants and children between 3 and 24 months of age to see if they are behind on their shots. If they are, WIC staff are required to refer them to a health care provider or to the county immunization clinic.

### 3. Substance Use

All local WIC programs are required to provide substance use prevention information. Staff providing nutrition counseling screen for substance use by asking the questions listed in the WIC data system. If substance use is identified during screening, WIC staff provide information on substance use and available local resources.



NOTE: If any referral is given—by any staff member—it must be documented in the participant's record. Documentation can assist with participant follow-up and ensure that any referral information offered is consistent.

## Community Partnerships

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WIC strives to form partnerships with other community agencies which also provide services our participants. These partnerships enhance customer service, increase program participation and are an important step to building a healthy community.

There are many agencies that currently partner with WIC:

- Head Start/preschools/day care centers
- Oregon State University Extension
- Department of Human Services (DHS) offices – SNAP (food stamps), TANF, Oregon Health Plan
- Medical providers/rural health clinics/hospitals
- Other health department programs including home visiting
- Grocery stores/pharmacies/farmers markets
- Food banks
- Housing assistance programs
- Breastfeeding and lactation consultants

Here are a few examples of WIC community partnerships:

- Hospital staff loaning WIC breast pumps to participants after delivery.
- New WIC participants getting enrolled in WIC at the hospital or local health clinic.
- Dental hygienist providing basic oral health services at the WIC clinic.
- WIC providing participant information to Head Start to make it easier for shared families to be enrolled in both programs.
- Collaborating with local farmers' markets to promote the use of Farm Direct checks.
- OSU Extension staff working with WIC staff to teach a nutrition education group.

## Learning Activity

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1. What are the commonly provided referrals at your clinic? Using the [Job Aid: Referrals](#), fill in the information about these agencies. Your training supervisor can help you find the information you need.
2. Ask your training supervisor about what written materials are used in your agency for referrals. Find out if your agency tracks referral organizations in the database.
3. Ask your training supervisor what referrals are appropriate for you to offer, depending on your role. If you are a certifier, discuss how and when referrals can be offered during the visit.



## Skill Check – Self-Evaluation

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1. Why is it important to refer WIC participants to outside services?
2. What are the three required referrals for WIC, if a need is identified?
3. List two health or social service agencies to which your program commonly refers participants?





## 3-1 Overview of Certification

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Items Needed – available at end of the module or by clicking the link

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- [Handout: My Rights and Responsibilities](#)
- [Participant Signature Form.](#)
- [Attachment: Certification and Nutrition Education Checklists](#)
- [Job Aid - Overview of WIC Certification](#)

### WIC Policies

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- [WIC Policy 620](#) – Certification and Issuing Benefits to Co-Workers, Relatives and Friends
- [WIC Policy 645](#) – Certification Periods
- [WIC Policy 646](#) – Mid-Certification Health Assessment.
- [WIC Policy 595](#) – Program Integrity: Separation of Duties

### Objectives

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After completing this lesson, you will be able to:

- List the different types of appointments WIC offers.
- Describe applicant prescreening.
- Describe what happens during a certification appointment.
- Describe what happens during a nutrition education appointment.
- Describe what happens during a recertification appointment.
- State the certification periods for each category of participant.

## Overview

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What is certification? Certification is the process of determining whether or not a person qualifies for WIC services. WIC is different than other social service programs because a person must have a nutrition need to qualify for WIC.

- The CPA must complete the certification, although other staff members may help collect the information.
- WIC's data system is used to collect and store information about participants.
- The participant comes to the WIC office in person for the certification appointment.

**NOTE:** During this lesson, follow along with your [Job Aid - Overview of WIC Certification](#)

## Applicant Prescreening

---

Applicant prescreening is used when a family calls and is interested in applying for WIC. Prescreening occurs before the certification appointment. The WIC clerk usually handles the applicant prescreening.

This is what happens during applicant prescreening.

1. Participant calls and asks if their family is eligible for WIC.
2. The family is screened for eligibility.
  - Do they live in the area served by your clinic?
  - Are they in a category served by WIC?
    - Pregnant woman.
    - Breastfeeding woman with an infant under 12 months.
    - Postpartum woman through 6 months after delivery.
    - Infant under 12 months.
    - Child age 1 through their 5th birthday.



- Does their income fall within the WIC Income Guidelines?
- 3. If the family meets the criteria for residency, category and income eligibility, they are scheduled for a certification appointment. The WIC clerk tells them what information they need to bring to their appointment.
- 4. If the family does NOT meet the criteria for eligibility, they can be referred to other community resources.

## Certification Appointment

---

Although other staff may help collect the information used during the certification, a CPA (Competent Professional Authority) must review the information and determine if the person is eligible or ineligible.

This is an example of the steps that would be taken during the certification appointment of Sylvia, a pregnant woman who is applying for WIC.



1. Sylvia checks in with the WIC clerk upon arriving for her appointment.
2. WIC staff complete the WIC intake process by reviewing Sylvia's proof of identity, residency and income and documenting it in the data system.
3. Sylvia is offered the opportunity to register to vote by asking, "If you are not registered to vote where you live now, would you like to register here today?"
4. WIC staff reviews the handout My Rights and Responsibilities with Sylvia and she signs the Participant Signature Form, indicating consent for services, release of information and the offer of voter registration.
5. WIC staff collect Sylvia's medical data.
  - Anthropometric data includes Sylvia's height and weight.
  - Biochemical information includes a blood test for anemia. This test is called a hemoglobin or hematocrit. Most clinics do the blood test themselves with a finger-stick blood sample.
6. The CPA conducts a nutrition risk assessment, engaging Sylvia in a conversation about her health, diet, and past and current medical conditions.

- Sylvia's health information is assessed for medical risk factors.
  - Sylvia's diet information is assessed for dietary risk factors.
  - The CPA documents any risk factors in the data system.
7. The CPA and Sylvia work together to develop a plan to help Sylvia meet her nutrition goals. This is Sylvia's first nutrition education contact.
    - The CPA asks Sylvia to identify areas of interest or concern.
    - They talk about Sylvia's health interests and concerns.
    - The CPA offers Sylvia breastfeeding support.
    - They work together to establish "Next Steps" for Sylvia.
  8. The CPA summarizes the reasons Sylvia is being enrolled on the program and connects program eligibility to improved health outcomes.
  9. The CPA assigns Sylvia a food package. (WIC foods she will receive). The food package is based on Sylvia's category and nutrition needs.
  10. Sylvia is scheduled to return for her quarterly nutrition education contact.
  11. Sylvia is given referrals to community resources, if needed.
  12. Sylvia is given her eWIC card, a Food List, and is issued her first food benefits, with information about how to use them.

**NOTE:** To maintain program integrity, two staff people must be involved in determining income eligibility and risk determination. These duties are usually separated between the CPA and the clerk (see [WIC Policy 595](#) for more information).

## WIC Certification Periods

---

When a person is eligible for WIC, they are certified for only a short period of time, usually 1 year. This time is called their **certification period**. At the end of their certification period, they may be eligible to be recertified for more time on WIC. The length of time a person is certified by WIC is mandated by federal government rules.

In general, the certification periods follow these guidelines:

Category of Participant	Certification Period
Pregnant woman	From first enrollment appointment to 6 weeks following delivery. At that time they may be re-certified as a breastfeeding or non-breastfeeding woman.
Breastfeeding woman	From certification appointment following delivery until baby's first birthday.
Non-breastfeeding postpartum women	From certification appointment following delivery through 6 months after delivery.
Infants under 6 months	From their first certification appointment until their first birthday.
Infants 7 months to 12 months	Certified for 6 months.
Children	Certified for 1 year, then may be recertified for another year for as long as they are eligible. Eligibility automatically ends at the end of the month in which the child turns 5 years old.

NOTE: See [WIC Policy 645](#) – Certification Periods for more information.

Oregon WIC uses the following abbreviations for the different WIC categories of participants.

<b>WIC Category Abbreviations</b>	
Abbreviation	WIC Category Description
WP	Woman, pregnant
WE	Woman, fully breastfeeding
WB	Woman, mostly or some breastfeeding
WN	Woman, non-breastfeeding
IE	Infant, fully breastfeeding
IB	Infant, mostly or some breastfeeding
IN	Infant, non-breastfeeding
C	Child

## Quarterly Nutrition Education

---

WIC participants receive nutrition education as part of their enrollment and recertification appointments. They are also offered additional nutrition education every 3 months during their certification period. All nutrition education is documented in the participant's record. The following are examples of quarterly nutrition education.

### Mid-Certification Health Assessment

The mid-certification health assessment is an expanded nutrition education appointment. As the name implies, it happens in the middle of the participant's certification period. At the mid-certification health assessment, the CPA or nutritionist talks with the participant to find out how they have been doing since the previous WIC appointment.

During this visit, the CPA or nutritionist:

- Reviews the summary of the participant's last visit to WIC.

- Collects medical data (height or length, weight, blood measurement).
- Talks with the participant about health or diet changes.
- Updates the participant's risk factors, if needed.
- Provides participant-centered nutrition education.
- Updates the participant's "Next Steps."
- Documents the nutrition education provided and any other pertinent information.
- Schedules the next quarterly appointment.



### **Individual Follow-Up**

The individual follow-up appointment is for participants who need a more personalized nutrition education contact. The CPA or nutritionist talks with the participant to find out how they have been doing since the last WIC appointment. During the individual follow-up, the CPA or nutritionist:

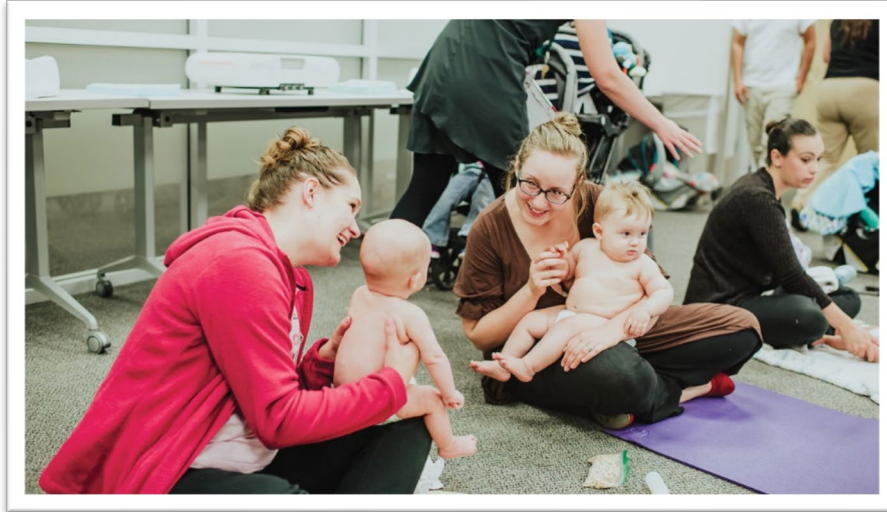
- Reviews the summary of the participant's last visit to WIC.
- May collect more medical data (height or length, weight, blood tests).
- Updates the participant's risk factors, if needed.
- Provides participant-centered nutrition education.
- Updates the participant's "Next Steps."
- Documents the nutrition education provided.



## Group Education

Group education is generally for low-risk participants, but is available to everyone.

- A variety of groups are available at most clinics to meet the needs of many different types of WIC participants.
- Groups may be offered at numerous times.
- Groups may be offered in English and other languages.



## Online lessons and self-paced lessons

Many participants are scheduled to complete their quarterly nutrition education contact using online or self-paced nutrition lessons. These are also documented in the participant's record.

### High Risk Participants

At WIC, participants with serious health or diet problems are called “high risk.” These participants are required to see the WIC nutritionist to plan for their special nutrition needs. High risk participants are usually scheduled for individual follow-up appointments with the WIC nutritionist and not for group or online nutrition education.

## Recertification


---

When the participant's initial certification period is finished, they must be recertified to continue to participate in WIC. Recertification is similar to the initial certification appointment. The participant goes through the same processes, but because much of the information has already been collected and is stored in the computer, it just needs to be updated.

NOTE: You may not certify or issue food benefits to your own relatives. For more information, see [WIC Policy 620](#) – Certification and Issuing Benefits to Relatives, Friends, and Co-Workers.

## Learning Activity

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1. Review the following items and highlight or underline important information, including voter registration.
  - [Handout: My Rights and Responsibilities](#)
  - [Participant Signature Form](#)
2. Ask your training supervisor to show you where signed **Participant Signature Forms** are filed.
3. Observe a variety of appointments from start to finish. Use the [Attachment: Certification and Nutrition Education Checklists](#) to take notes on the appointments. Your training supervisor can help arrange your observations. You should observe the following types of appointments:
  - Applicant Prescreening (if needed, observe a clerk screening people on the phone)
  - Certification – Pregnant Woman
  - Certification – Breastfeeding Woman
  - Certification – Infant
  - Certification – Child
  - Recertification – Child
  - Individual Follow-Up (Nutrition Education)
  - Group Education (Nutrition Education)
  - Breastfeeding Group for Pregnant Women (Nutrition Education)

## Skill Check – Self-Evaluation

---

1. What are the types of appointments that WIC participants are scheduled for?



2. What is the purpose of the certification and recertification appointments?
3. What is the purpose of prescreening?
4. How often do participants receive nutrition education?

## 3-2 Proof of Identity, Residency and Income

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Items Needed – Available in your clinic or by clicking the link

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- Handout: [What Proof to Bring to WIC](#)
- Handout: [No Proof Form](#)

### WIC Policies

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- [WIC Policy 610](#) – Required Proofs - Identity, Residence and Income

### Objectives

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After completing this lesson, you will be able to:

Describe the three “proofs” participants are required to bring to certification appointments.

### Overview

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For each WIC certification appointment (new enrollment and recertification), participants are asked to bring proof of identity, residency and income. These are used during the evaluation of the participant’s eligibility.

In most clinics, the clerks are responsible for collecting the information on identity, residency and income, and the CPA evaluates nutrition risk and issues food benefits. This arrangement meets federal separation of duties requirements.

### Verifying Identity

---

Each time a person is certified for WIC, they must show **proof of identity (ID)**. Ask to see their proof of identity at their first certification and at each recertification appointment. This rule is set by the federal government to help prevent fraud.



NOTE: You must confirm a participant's identity when they are being issued food benefits. You ask them their name, date of birth and zip code, to verify it against the information in the data system.

## Learning Activity

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1. For more information about proof of identity, read [WIC Policy 610 - Required Proofs - Identity, Residence and Income](#).
2. Read the "Proof of Identity" section of the [What Proof to Bring to WIC](#) handout.
  - List three acceptable forms of ID for women.
  - List three acceptable forms of ID for infants/children.



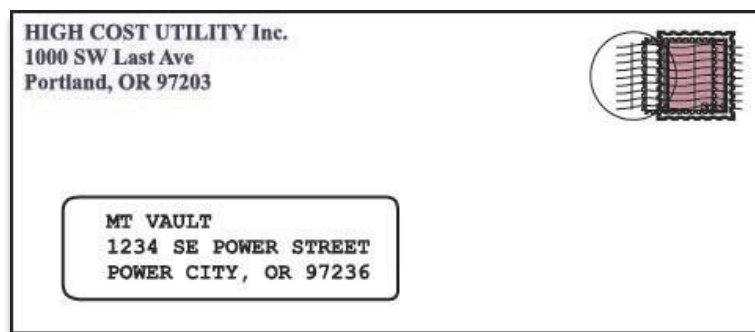
## Verifying Residency

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Each time a person is certified for WIC, they must also show **proof of residency**. The staff member doing this task will ask to see a document that shows their name and address. Proof of residency will show that the person actually lives in Oregon. This rule is set by the federal government to help prevent people from receiving WIC benefits at more than one WIC office.

If a person lives in Oregon, but outside of your clinic's service area, tell them about the local WIC agency that normally serves that area. The Oregon WIC website has a complete list of WIC programs, local agency phone numbers, and a searchable map.

Sometimes a participant may want to come to your clinic even though their home is in another clinic's service area. They may work or have childcare near your clinic, or your clinic may have staff who speak their primary language. If the participant lives in Oregon, you may enroll them in your clinic. We want to provide the best customer service to the participant and reduce any barriers to them being able to participate in the WIC program.



**NOTE:** Residency refers to where the person normally sleeps at night. It is not the same as proof of citizenship. WIC does NOT require proof of US citizenship.

## Learning Activity

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For more information about proof of residency, read [WIC Policy 610 – Required Proofs - Identity, Residence and Income](#).



1. Read the “Proof of Residency” section of the [What Proof to Bring to WIC](#) handout.
  - List three acceptable forms of proof of residency.
2. Talk to your supervisor about which other WIC programs are nearby that may serve participants from your service area.

## Verifying Income

---

Each time a person is certified for WIC, they must show **proof of income**. This will determine if their household income falls within the WIC Income Guidelines.

THE BEST COFFEE PLACE 5687 NW COFFEE ST. COFFEE CITY, OR 97123 EMPLOYEE PAYCHECK FOR MONTH OF JULY	
EMPLOYEE NAME QUEEN, JAVA	HOURS WORKED THIS MONTH 100 HOURS
GROSS PAY \$567.89	COUNTY TAX \$35.45
NET PAY \$472.39	STATE TAX \$60.05
AMOUNT DEPOSIT THIS MONTH \$472.39	TOTAL PAY TO DATE \$2,001.04



## Learning Activity

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1. Read the “Proof of Income” section of the [What Proof to Bring to WIC](#) handout.
2. List three acceptable forms of proof of income.



## No Proof

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If a person does not bring proof of identify, residency or income to the WIC appointment, they can be certified on that day and asked to bring the proof within 30 days. They would need to complete a [No Proof form](#) declaring that they did not bring proof to the appointment and will bring it in within 30 days.

If they do not bring the proof within 30 days, they will be terminated (removed) from WIC. Be sure to let them know what proof they need to bring and when they need to come back. You can offer them the [What Proof to Bring to WIC](#) handout.

If a person cannot provide proof of identity, residency or income due to special circumstances (such as theft, disaster, homelessness or migrant status) they can fill out the [No Proof Form](#) and indicate why they are not able to provide proof. These participants will not be terminated in 30 days.

**NOTE:** For specific information on how to determine income eligibility, see the Income Eligibility lesson.

## Learning Activity

---

1. Review [this information](#) about how to handle situations when the participant does not have proof of income.
2. Ask your training supervisor where to find a blank No Proof Form and where completed forms are filed.
3. Observe another staff person completing a No Proof form for someone with eligibility pending.



## Skill Check – Self-Evaluation

---

1. Using the [What Proof to Bring to WIC](#) handout, practice what you would tell a participant about what “proofs” they need to bring to their certification appointment. You may practice aloud to yourself or with a friend or coworker.



## 3-2 Proof of Identity, Residency and Income

---

Items Needed – Available in your clinic or by clicking the link

---

- Handout: [What Proof to Bring to WIC](#)
- Handout: [No Proof Form](#)

### WIC Policies

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- [WIC Policy 610](#) – Required Proofs - Identity, Residence and Income

### Objectives

---

After completing this lesson, you will be able to:

Describe the three “proofs” participants are required to bring to certification appointments.

### Overview

---

For each WIC certification appointment (new enrollment and recertification), participants are asked to bring proof of identity, residency and income. These are used during the evaluation of the participant’s eligibility.

In most clinics, the clerks are responsible for collecting the information on identity, residency and income, and the CPA evaluates nutrition risk and issues food benefits. This arrangement meets federal separation of duties requirements.

### Verifying Identity

---

Each time a person is certified for WIC, they must show **proof of identity (ID)**. Ask to see their proof of identity at their first certification and at each recertification appointment. This rule is set by the federal government to help prevent fraud.



NOTE: You must confirm a participant's identity when they are being issued food benefits. You ask them their name, date of birth and zip code, to verify it against the information in the data system.

## Learning Activity

---

1. For more information about proof of identity, read [WIC Policy 610 - Required Proofs - Identity, Residence and Income](#).
2. Read the "Proof of Identity" section of the [What Proof to Bring to WIC](#) handout.
  - List three acceptable forms of ID for women.
  - List three acceptable forms of ID for infants/children.



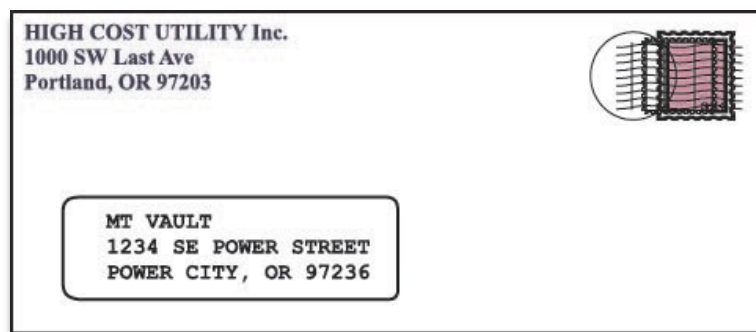
## Verifying Residency

---

Each time a person is certified for WIC, they must also show **proof of residency**. The staff member doing this task will ask to see a document that shows their name and address. Proof of residency will show that the person actually lives in Oregon. This rule is set by the federal government to help prevent people from receiving WIC benefits at more than one WIC office.

If a person lives in Oregon, but outside of your clinic's service area, tell them about the local WIC agency that normally serves that area. The Oregon WIC website has a complete list of WIC programs, local agency phone numbers, and a searchable map.

Sometimes a participant may want to come to your clinic even though their home is in another clinic's service area. They may work or have childcare near your clinic, or your clinic may have staff who speak their primary language. If the participant lives in Oregon, you may enroll them in your clinic. We want to provide the best customer service to the participant and reduce any barriers to them being able to participate in the WIC program.



**NOTE:** Residency refers to where the person normally sleeps at night. It is not the same as proof of citizenship. WIC does NOT require proof of US citizenship.

## Learning Activity

---

For more information about proof of residency, read [WIC Policy 610 – Required Proofs - Identity, Residence and Income](#).



1. Read the “Proof of Residency” section of the [What Proof to Bring to WIC](#) handout.
  - List three acceptable forms of proof of residency.
2. Talk to your supervisor about which other WIC programs are nearby that may serve participants from your service area.

## Verifying Income

---

Each time a person is certified for WIC, they must show **proof of income**. This will determine if their household income falls within the WIC Income Guidelines.

THE BEST COFFEE PLACE 5687 NW COFFEE ST. COFFEE CITY, OR 97123 EMPLOYEE PAYCHECK FOR MONTH OF JULY	
EMPLOYEE NAME QUEEN, JAVA	HOURS WORKED THIS MONTH 100 HOURS
GROSS PAY \$567.89	COUNTY TAX \$35.45
NET PAY \$472.39	STATE TAX \$60.05
AMOUNT DEPOSIT THIS MONTH \$472.39	TOTAL PAY TO DATE \$2,001.04

## Learning Activity

---

1. Read the “Proof of Income” section of the [What Proof to Bring to WIC](#) handout.
2. List three acceptable forms of proof of income.



## No Proof

---

If a person does not bring proof of identity, residency or income to the WIC appointment, they can be certified on that day and asked to bring the proof within 30 days. They would need to complete a [No Proof form](#) declaring that they did not bring proof to the appointment and will bring it in within 30 days.

If they do not bring the proof within 30 days, they will be terminated (removed) from WIC. Be sure to let them know what proof they need to bring and when they need to come back. You can offer them the [What Proof to Bring to WIC](#) handout.

If a person cannot provide proof of identity, residency or income due to special circumstances (such as theft, disaster, homelessness or migrant status) they can fill out the [No Proof Form](#) and indicate why they are not able to provide proof. These participants will not be terminated in 30 days.

**NOTE:** For specific information on how to determine income eligibility, see the Income Eligibility lesson.



## Learning Activity

---

1. Review [this information](#) about how to handle situations when the participant does not have proof of income.
2. Ask your training supervisor where to find a blank No Proof Form and where completed forms are filed.
3. Observe another staff person completing a No Proof form for someone with eligibility pending.



## Skill Check – Self-Evaluation

---

1. Using the [What Proof to Bring to WIC](#) handout, practice what you would tell a participant about what “proofs” they need to bring to their certification appointment. You may practice aloud to yourself or with a friend or coworker.



## 3-3 Income Eligibility

---

Items Needed - available at the end of the module or by clicking the link

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- [Job Aid: WIC Income](#)
- [Job Aid: Steps for Determining Income Eligibility](#)
- Handout: [What Proof to Bring](#)

### WIC Policies

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- [WIC Policy 451](#) – Change in Guardianship
- [WIC Policy 611](#) – Income Eligibility: Determining Income Eligibility
- [WIC Policy 612](#) – Income Eligibility: Adjunct or Automatic Income Eligibility
- [WIC Policy 613](#) – Income Eligibility: What Counts as Income
- [WIC Policy 614](#) – Income Eligibility: Current Income Guidelines
- [WIC Policy 616](#) – Unavailable Proofs
- [WIC Policy 650](#) – WIC Transfers/VOC and WIC Overseas Program

### Objectives

---

After completing this lesson, you will be able to:

- Correctly screen for income eligibility.
- Identify whether a transfer participant is eligible for WIC.

### Overview

---

Each time a person is certified for WIC, their income level is evaluated to determine if their household income falls within the WIC Income Guidelines. WIC income evaluation is assisted by the data system. There are two ways to determine income eligibility: adjunctive eligibility and by calculating household income.

## Adjunctive Eligibility

---

Adjunctive eligibility is a term used to describe “automatic” income eligibility based on income screening already completed by other assistance programs. The person must show proof of participation in one of the following programs:

- Medicaid/OHP (Oregon Health Plan)
- TANF – Temporary Assistance for Needy Families (Welfare)
- SNAP (Supplemental Nutrition Assistance Program, previously known as Food Stamps)
- FDPIR (Food Distribution Program on Indian Reservations)

The proof of participation must show that they are eligible for the other program during the current month. An Oregon Trail Card alone (Electronic Benefits Card from SNAP) cannot be used as proof because it does not show current eligibility. However, looking up Oregon Health Plan eligibility online through the OHP Portal acts as proof of adjunctive income eligibility.

Document the proof of income for adjunctive eligibility in the data system. Participants who are adjunctively eligible will still need to report their monthly income for documentation.

Talk with your training supervisor for more information about the OHP Portal.



**NOTE:** For more information on adjunctive eligibility, see [WIC Policy 612 – Income Eligibility: Adjunct or Automatic Income Eligibility](#).

## Learning Activity

---

1. Circle whether or not these people would be adjunctively eligible for WIC based on the information they bring to WIC.



Yes/No	Teiana brings in her welfare letter showing her child received TANF this month.
Yes/No	Mei brings in her Oregon Trail Card.
Yes/No	Suriya brings in her current Medicaid letter.
Yes/No	Josefina brings in her receipt from the Oregon Food Bank.

## Calculating Household Income

---

If a family does not bring in proof that they are adjunctively eligible, then you must calculate their total household income to determine eligibility.

WIC must verify all sources of income for the household. The household size and total income are compared to the WIC Income Guidelines to determine if the family is eligible for WIC.

### Household

For WIC purposes, a household is defined as:

- A person or group of people, related or not, who usually (though not necessarily) live together and whose income and consumption of goods and services are related.
- For pregnant women, each fetus is counted as an additional household member.



## Examples of Household Size

**Suriya** lives alone in an apartment. She is pregnant with twins. She receives TANF and is on the Oregon Health Plan. Suriya's household size would be counted as three (3).

**Josefina** lives with her boyfriend. They have a 2 month-old baby who lives with them. Josefina receives TANF payments and her boyfriend works part-time. They cook their meals together and shop together. Josefina's household size would be counted as three (3).

**Mei** has a 3-year old son and lives with a roommate. She works and so does her roommate. She and her roommate split the bills evenly and each pays half. Mei and her son buy their food separately and eat separately from the roommate. Mei's household size would be counted as two (2).

## Income

For WIC purposes, include the income of all household members. Generally, the type of proof of income used for calculating income includes:

- Current pay stubs
- Unemployment benefits stub
- W-2 forms or income tax return
- Foster child placement letter
- Signed letter from employer stating gross earnings
- Benefits or earnings statements
- Letter of alimony or child support payments

Income information is entered on the "Income Eligibility" screen in the data system. Because not all families are paid one time per month, you can enter the time period of their payment in the interval field. The data system then calculates if the income is within the allowable WIC income guidelines. You can also enter more than one source of income.

### 30 days of Income

You need to review approximately 30 days' worth of pay stubs, regardless of the pay period.

If they are paid:	Verify:
Monthly	1 pay stub
Every 2 weeks	2 pay stubs
Twice a month	2 pay stubs
Weekly	4 pay stubs

#### Examples of Income Documentation

- Gabby is paid \$300 once a week.
  - You review 4 pay stubs that all say the same thing.
  - In the data system, \$300 is entered with a “weekly” interval.
- 
- Jaime has three jobs. This is the information entered in the data system:
    - \$100 – weekly. You see 4 pay stubs.
    - \$200 – every 2 weeks. You see 2 pay stubs.
    - \$500 – monthly. You see 1 pay stub.
  - The data system calculates the annual income to be \$17,700 per year.
    - \$100 per week = \$5,200 per year
    - \$250 every 2 weeks = \$6,500 per year
    - \$500 monthly = \$6,000 per year
    - Total..... \$17,700

**NOTE:** For detailed information on calculating income, including unusual cases, see:

- [WIC Policy 611 – Income Eligibility: Determining Income Eligibility](#)
- [WIC Policy 613 – Income Eligibility: What Counts as Income?](#)

## WIC Income Guidelines

---

Each year, the federal government updates the federal poverty guidelines which are used to determine eligibility in many assistance programs. WIC uses the federal poverty guidelines to determine our WIC Income Guidelines. The WIC Income Guidelines are set above the federal poverty guidelines at 185% of the federal level.

If a family's income is below the WIC Income Guidelines, they would have an income that qualifies them for WIC. However, income eligibility does not automatically mean someone is eligible for WIC. They would still need to be determined to be eligible based on residence, category and nutrition need.

The most current version of the guidelines can be found in [WIC Policy 614 – Income Eligibility: Current Income Guidelines](#) and on the [eligibility guidelines](#) page of the WIC website.

## Learning Activity

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1. Find a copy of the current WIC Income Guidelines.
2. Read the [Job Aid: WIC Income](#).
3. Using the WIC Income Guidelines and your Job Aid: WIC Income, answer the questions about each scenario.



**Scenario 1.** Maria lives with her husband who gets paid \$500 once a month. They have two children.

- What is their household size?



- What is their monthly income?
- Is Maria income eligible for WIC?

**Scenario 2.** Chandra is pregnant with twins. She lives with her boyfriend and a roommate. The roommate doesn't have a job and Chandra and her boyfriend are paying for his food. Chandra makes \$200 a week, and her boyfriend makes \$1000 a month.

- What is their household size?
- What is their annual income?
- Is Chandra income eligible for WIC?

**Scenario 3. Justin** is at WIC to enroll his son. He has sole custody of his son. His ex-wife pays child support of \$700 a month. Justin also receives \$400 a month in unemployment benefits. He and son live alone.

- What is their household size?
- What is their monthly income?
- Is Justin's son income eligible for WIC?

## Special Circumstances

---

In some cases, income calculation is different than usual.

### Foster Children

Foster children are counted as a household size of one. Use only the payment the foster family receives for their care as the income.

### Teen Mothers

Pregnant teens and teen mothers who live with their parents should be counted as their own household only when they have sufficient income to support themselves (paying rent, buying food, etc.). Otherwise, the household income should be counted, including the parents.

### Transfers

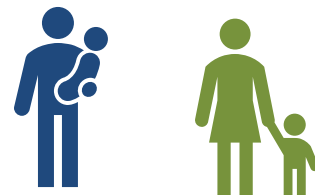
A WIC participant can transfer their certification to another county or state if they move. Participants transferring from another state should arrive with a Transfer or Verification of Certification (VOC) form or card. Participants transferring within Oregon do not need a VOC form. You can look up their certification information in the data system. If a transferring participant's certification period has not ended, they are eligible for WIC services at your clinic. You do not need to rescreen their income eligibility. They will need to show current proof of residency for your clinic's service area.

NOTE: For more information about transfers, see [WIC Policy 650 – WIC Transfers/VOC and WIC Overseas Program.](#)

### Split or Joint Custody

When the custody of a child is split, the child should be considered a member of the household in which they live the majority of the time.

If the parents share custody 50/50, the child can only qualify for WIC in one parent's household. That means the first parent to bring the child to WIC can be on the program.



**NOTE:** Talk to your training supervisor if you have questions about special circumstances or read these policies:

- [WIC Policy 611 – Income Eligibility: Determining Income Eligibility](#)
- [WIC Policy 451 – Change in Guardianship](#)

## Learning Activity

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1. Observe a coworker checking a participant's income eligibility.
  - Follow the process using the [Job Aid: Steps for Determining Income Eligibility](#).
  - Observe 5 – 10 interactions.
  - Your training supervisor can help you schedule your observations.
2. Use the [Job Aid: Steps for Determining Income Eligibility](#) and the [What Proof to Bring](#) handout to help answer the questions about the following scenario.



**Scenario:** Alexander Smith is 2 years old and is at WIC for his first certification appointment. He lives with his mom, Jacqueline, in an apartment. Jacqueline receives a \$500 per month TANF payment.

She brings with her to the appointment:

- Her Oregon driver's license.
- Alexander's birth certificate.
- A letter stating her TANF grant.
- An electricity bill with her name and address on it.
- Would you calculate the income for a "family" or "client?"
- What is Alexander's proof of ID and residency?

- What is Alexander's household size?
  - Is Alexander adjunctively eligible?
  - What is Alexander's income?
  - What would you enter for Alexander's proof of income?
  - Does Alexander need to bring back proof later?

## Skill Check – Self Evaluation

---

**Scenario:** Grenalda Dixon is pregnant with twins and is applying for WIC. She and her husband are the only ones living in their apartment. She brings with her to the appointment:



- Four of her husband's pay stubs for \$275 every week.
- A bill with her name and address.
- Her passport.

1. What is their monthly income?
2. What is her proof of income?
3. What is her proof of residency?
4. What is her proof of ID?



## 3-4 Issuing and Using the eWIC Card

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Items Needed - available at the end of the module or by clicking the link

---

- [Job Aid: Compare First and Second Cardholders](#)
- [Job Aid: Helping Families Use the Benefits List](#)
- Handout: [WIC Food List](#)
- Handout: [Shopping With Your eWIC Card](#)
- Handout: [Using Your Oregon eWIC Card](#)
- [Attachment: What Successful Shoppers Need to Know](#)
- Participant videos:
  - [Setting Your PIN](#)
  - [Shopping with Your eWIC Card](#)
  - [Checking Your Food Balance](#)
  - [Protecting Your eWIC card](#)

### WIC Policies

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- [WIC Policy 510](#) – eWIC Cardholder Requirements
- [WIC Policy 511](#) – Food Benefit Issuance
- [WIC Policy 561](#) – Program Integrity: Replacement of Food Benefits
- [WIC Policy 635](#) – Participant Notification, Eligibility, Rights and Responsibilities
- [WIC Policy 735](#): Exchange and Handling of Returned Formula



## Objectives

---

After completing this lesson, you will be able to:

- Explain the roles of the first and second eWIC cardholder.
- Explain to an eWIC cardholder how to shop with their eWIC card.
- Describe the situations where spent formula benefits can be replaced.

## Overview

---

Oregon WIC participants get their food benefits by using an electronic benefits transfer (EBT) card. In Oregon we refer to this as their **eWIC card**. They use the eWIC card to pay for WIC foods they buy at a WIC authorized grocery store. WIC's banking contractor keeps track of what foods each WIC family can get and reimburses the grocery store for any allowable WIC foods the family buys. WIC staff are responsible for issuing eWIC cards and making sure every family knows how to use their card to successfully shop for WIC food benefits.



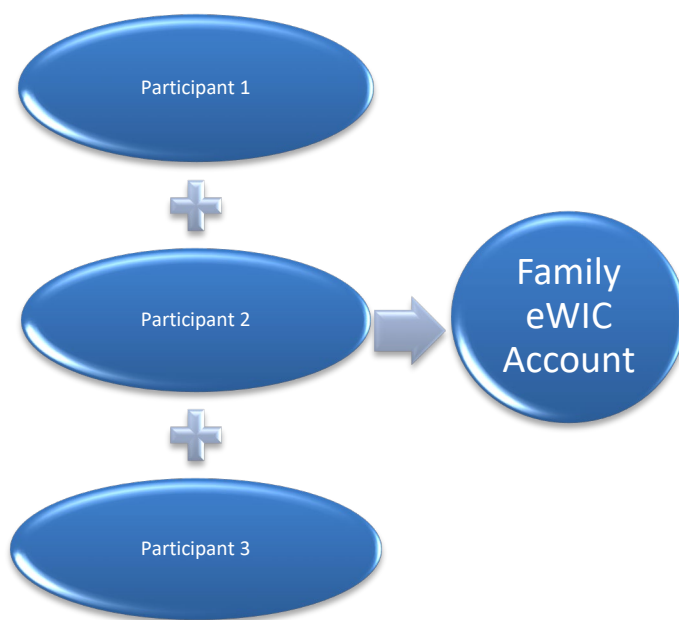
## It starts with an “account”

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Getting an eWIC card is a lot like getting a debit card for a checking account. Before you can get a card, you set up an account with the bank and deposit money.

In WIC, the data system sets up an account for each WIC family. The account number is the same as the family's WIC number.

Instead of money in the account, WIC food benefits are put in the account each month. If there are multiple WIC participants in one family, all their food benefits are in the same account.



## Issuing an eWIC card

---

WIC participants must have an **eWIC card** to purchase WIC foods. eWIC cards are issued by WIC staff when the participant is enrolled in WIC. Families may be issued one or two cards. If they have two cards, both cards access the same set of benefits.

The first cardholder is usually the adult participant or caretaker of the child. The first cardholder can choose anyone as the second cardholder. The second cardholder has full access to use the WIC benefits, so encourage the participant to choose their second cardholder carefully.

The first cardholder can remove the second cardholder's access to the WIC benefits at any time by calling the WIC clinic or the eWIC customer service line. First and second cardholders have different requirements and roles.



## Learning Activity

---

1. Review the [Job Aid: Compare First and Second Cardholders](#) and [WIC Policy 510 – eWIC Cardholder Requirements](#) to learn more about the differences between cardholders.

2. Use the [Job Aid: Compare First and Second Cardholders](#) to answer the following questions.



- When can the second cardholder be added?

- Who can be the first cardholder?
- What address is used for the first cardholder?
- When can a WIC staff person be an eWIC cardholder?
- What appointments can a second cardholder bring a child to?
- Which cardholder(s) can transfer a participant or discontinue WIC services?
- Who can access eWIC account information?

## Setting the PIN

---

In order to use the eWIC card, each cardholder must set a PIN. To do this they can either call the customer service line or go to the cardholder website. Both options are available 24/7.

If they don't have access to a phone or the internet, they can use a phone or computer in your office for the initial PIN set. The PIN can also be set and changed using a PIN setting device available in some WIC clinics.



### **Here's what cardholders need to know about setting their PIN:**

- The customer service phone number and cardholder website are on the back of the eWIC card.
- The customer service line and cardholder website are available in English and Spanish. When other languages are needed, have the cardholder use the customer service line. Have them wait until the recorded information ends without making any selections, and a live person will come on to help them use the language line.
- To use the website to set a PIN or access account information, the cardholder will need to set up an account with username, password and answer security questions.
- The PIN needs to be something they can remember but would be hard for someone else to guess. For example, they shouldn't select "1111" or "1234."

- You may offer to help cardholders navigate the PIN set process, but be sure to let them enter their PIN privately.
- To answer verification questions when they set or change the PIN or need to request a replacement card, they will need the specific cardholder information (the cardholder's date of birth and zip – not the child's) they gave us.
  - When using customer service in **English**, date of birth is entered: month, day, year: 01/31/1990
  - When using customer service in **Spanish**, date of birth is entered: day, month, year: 31/01/1990
  - For a second cardholder, they need to use their date of birth and zip (the information entered into the data system when the second card was set up)

## Learning Activity

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Watch the participant video [Setting your PIN](#) and review the [Using your Oregon eWIC Card](#) brochure. Use the information to answer the following questions.

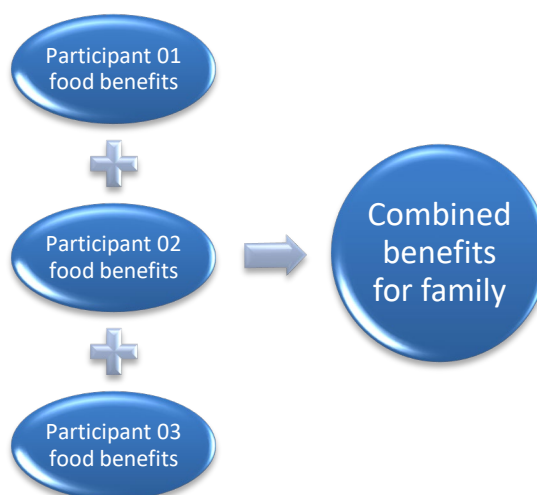


1. Name at least two ways a PIN can be set for the first time.
2. How can a PIN be changed?

## Issuing benefits

Foods for all the participants in a family are combined by food category each month. For example, if multiple people in the family are issued cereal in a month, the ounces for each person are added together to show the total amount of cereal available to purchase.

Participants are issued food benefits after they are determined to be eligible for WIC. Issuance of food benefits is coordinated with a participant's WIC appointments.



Participants can be issued up to three months of food benefits at a time, starting with the month of their certification appointment. After they complete their quarterly nutrition education, they can be issued another three months of food benefits. Participants who need to be seen at the WIC clinic more frequently may be issued one or two months of food benefits at a time.

Schedule appointments so participants have on-going access to their food benefits. It works best when they have benefits they can continue to use during the month of their next scheduled appointment. For example:

- A new participant is certified in January and issued 3 months of benefits – January, February and March. Their next appointment is scheduled for March.
- At their quarterly nutrition education appointment in March, issue benefits for the next 3 months – April, May and June. Their next appointment is in June.
- Continue the pattern throughout their certification.



## Here's what participants need to know when you issue their benefits:

- How many months of benefits have been issued.
- How much of each food category has been issued.
- The current month of benefits is the only one available for use.
- Unused benefits do not roll over to the next month, so they must be used before they expire.
- Benefits are available at 12:01 a.m. on the first day of the month and expire at 11:59 p.m. on the last date.

## Learning Activity

---

Use the [Job Aid: Helping Families Use Their Benefits List](#) to answer the following questions.



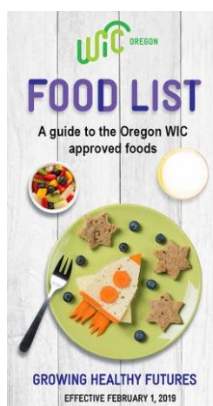
1. For what months have benefits been issued?
2. What are the first date to use and last date to use for the first month of benefits?
3. What are the names and categories of the participants who have been issued benefits?
4. Who are the cardholders for this account?
5. How much cereal does this family receive?
6. When should this family have their next appointment?

## Understanding what foods to buy

---

To know what foods to buy at the store, shoppers need two things – the Benefits List and the WIC Food List.

The **Benefits List** tells the cardholder what general food categories have been issued and how much of each they get. Each new eWIC cardholder should get a Benefits List when they are issued their eWIC card. Part of your job may be to explain the Benefits List to new participants.



The **WIC Food List** shows what specific foods are approved to purchase and what is allowed or not allowed from each food category. In some cases, it will give sizes or specific brands.

Most clinics will have the Food List available in English and Spanish. The Food List is available on [our website](#) in more than 10 languages.

Part of your job may be to explain the details of the Food List to new participants.

Another useful tool for shopping is the **WICShopper app**, available free to download onto smartphones or tablets (Android and Apple).

The app works best when it is opened before shoppers enter the store so all the features are loaded and ready to use. The WICShopper app can be personalized to show the family's benefits. It also has the Food List in all available languages.



Some stores use WIC **shelf tags** to indicate which foods or brands are WIC authorized. These can help a new shopper find WIC foods. Unfortunately, not all stores use them and they don't always stay in the right place, so they still need to check the Food List to be sure.



## Common food selection problems

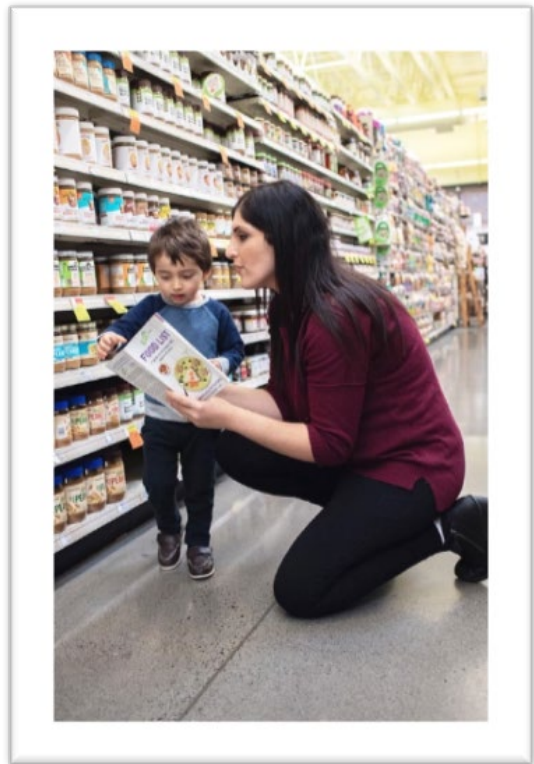
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Sometimes, the participant may have problems at the cashier because their eWIC card can only purchase approved WIC foods which have specifically been issued to the family. If the item doesn't ring up as a WIC food, it could be they don't have the balance needed, or the food might not be on the Food List.

**Example 1:** The cardholder's Benefits List says they have 36 ounces of cereal. They bring a box of Cocoa Crisp to the register. Their purchase would be denied because Cocoa Crisp is not a WIC approved cereal.

**Example 2:** The same cardholder brings up an 11-ounce box of Cheerios. Their purchase would be denied at the register because the 11-ounce size is not approved.

**Example 3:** The cardholder brings up a package of cranberries. Their purchase is denied, even though this is a WIC approved food and they have enough benefits. This can happen when a new or seasonal type of fresh fruit or vegetable hasn't been entered into the database of approved WIC foods. The cashier cannot override the denial but could offer to send the product information to the State WIC office to possibly get approved for the future.



If a food isn't covered by WIC, the shopper can ask the cashier to remove it from their order. The shopper can also choose to purchase the item with another form of payment.

**NOTE:** If they can't buy an item that they think is WIC approved, they can:

- Use the "I couldn't buy this!" feature on the WICShopper app.
- Call their WIC clinic to verify their benefits and the food item's eligibility.

Neither of these options will change what can be purchased in that moment.

## Learning Activity

---

Use the [Job Aid: Helping Families Use the Benefits List](#) and the [WIC Food List](#) to answer the following questions.



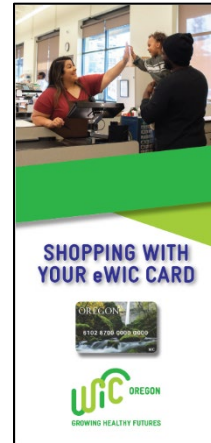
1. Why are there two types of milk listed as benefit options?
2. How many and what size containers of 1% or fat free milk would need to be purchased, to use all of the milk benefit during the first month?
3. How many 4-ounce jars of baby food can they buy this month?
4. How many total containers of canned beans can they buy this month if they don't buy peanut butter or dried beans? What size are the containers of canned beans?
5. Can this family buy apple cider with WIC?
6. What types of food can this family buy with their whole grain benefit?
7. What kind of oatmeal can they buy with their cereal benefit?

## Shopping with the eWIC card

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There are a lot of things to think about and remember when a cardholder shops for WIC foods. It can be a little bit intimidating the first time a new WIC cardholder goes shopping. They must think about which foods they were issued, which brands are okay to buy, and what size containers they can get. And that is before they even get to the check stand!

The [Shopping with your eWIC Card](#) brochure and [video](#) will help cardholders learn to shop successfully. All videos are available on the WICShopper app under “Get Help!” or on the Oregon WIC website.

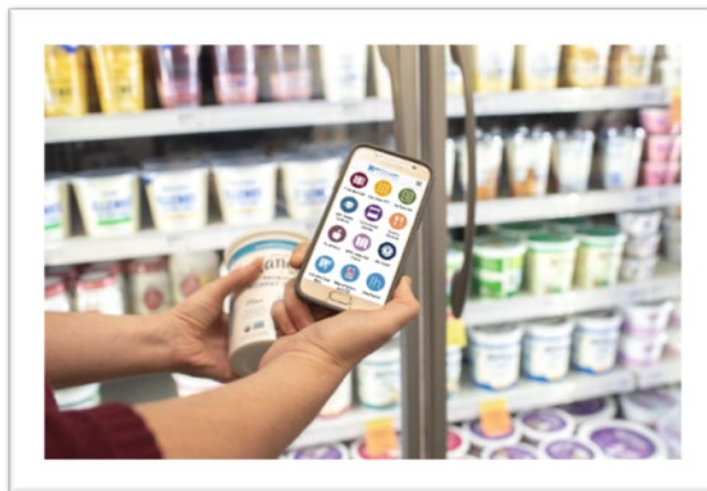


### What participants need to know before for shopping:

- eWIC cards only work at WIC authorized stores. Although not all grocery stores are WIC authorized, there are many stores across the state that participants can choose from. They may locate stores in their area by using Find a WIC Clinic or Store feature on the WICShopper app or Oregon WIC website.
- The first time they use eWIC at a store, suggest that they separate their WIC foods from their other groceries. This can be helpful until they get used to the process.
- If something doesn't go through, they can ask the cashier to remove it or pay for it another way.
- It's OK to use coupons and store club cards.
- Use their eWIC card first before SNAP or other types of payment such as cash, debit, or their credit card.
- If fruit and vegetable purchases exceed the eWIC balance, the cardholder can pay the extra with SNAP, cash, debit, etc.



- Make sure their WIC purchase is correct before using other forms of payment.
- Keep their receipt since it shows their remaining WIC food balance.
- They can shop as often as they want and can buy just what they need at the time. They just want to make sure they buy all their WIC foods by the end of the month.



## Benefit balance

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One of the challenges of shopping for WIC food benefits is keeping track of how much a family still has available to purchase. If a family doesn't know that they have a remaining benefit balance, they are less likely to purchase and use all their WIC foods. Since we want families to get the full nutritional benefit from their WIC foods, it is important that we make sure they know how to find their current WIC food balance.

### 5 ways a cardholder can check their benefit balance:


1. The WICShopper app shows their current benefits balance. They can scan a product to see if it is WIC authorized and that they have enough benefits to purchase it.
2. Cardholders can call the toll-free eWIC customer service line 24/7. They need to enter their eWIC card number in order to get their balance. They will hear a listing of the foods and amounts they have left for the month.



3. They can go to the eWIC cardholder website and see the listing of what they have left for the month. It will be necessary to set up an account on the cardholder website before they will be able to check their benefits.
4. They can look at the “Remaining Balance” section of their last eWIC shopping receipt. The remaining balance is printed on the receipt every time they shop along with the date their benefits expire.
5. They can ask a cashier at the grocery store for an eWIC Balance Inquiry. They will need to swipe their eWIC card and enter their PIN to get their balance printed on a receipt.

## Learning Activity

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1. Watch the participant video – [Shopping with your eWIC card](#) and review the [Shopping with your eWIC Card](#) brochure. Use the information to answer the following questions.
  - What would you buy to get .75 gal of milk?
  - What foods are issued in a dollar amount?
2. Watch the [Checking Your Food Balance](#) participant video and use the sample receipts in the [Shopping with your eWIC Card](#) brochure and answer the following questions about the remaining balance.
  - When is the last day they could buy the remaining foods?
  - How much cereal do they still have left?
  - How much milk can they still buy?
3. Observe a coworker explaining the use of the eWIC card to a new WIC cardholder.
4. Use the [Shopping with your eWIC Card](#) brochure and the [WIC Food List](#) to practice explaining how to shop to a coworker. Ask your coworker to provide you with feedback by asking them the following questions:

- What, if anything, might I change next time?
  - What went well?
  - What do you think is the most important thing to emphasize?
5. If possible, download the WIC Shopper app on your phone and register using this eWIC number: 6102870000115055.

Look at the benefit balance.

Note: It can be useful to show participants this account on your phone when you need to explain it to them.

## Keeping benefits, cards and PINs secure

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Keeping both the eWIC card and PIN safe is important. Usually, losing a card is more of an inconvenience than a problem since cards can be easily replaced and a card that is found can't be used without the PIN.

Losing benefits is more likely to happen when someone has access to both the card and the PIN. This could happen in situations such as the cardholder loaning the card to someone. This is the reason that the first cardholder needs to be either the adult participant (e.g. the pregnant woman) or the caregiver of an infant or child participant (who is also a member of the infant or child participant's household). It is also the reason that the first cardholder can remove the second cardholder from the account at any time.

### **What cardholders need to know to keep their eWIC card safe and secure:**

- Keep their eWIC card in a safe place.
- Do not write the PIN on the card or on paper that is kept near the card.
- Don't share the PIN with anyone.
- Report any lost cards immediately. Cardholders can do this 24/7 on the customer service line or the cardholder website, or by calling the WIC clinic during business hours.



- Lost cards can be replaced by mail when the cardholder calls customer service line. This may take 5-7 days. They can be replaced in person during business hours at the WIC clinic.
- Only ask people they trust to be the second cardholder or to shop for them.
- They can reset their PIN anytime by contacting the customer service line, or on the cardholder website.
- Entering the wrong PIN at the store 4 times will lock the eWIC card. The card can be unlocked by calling the customer service line. To prevent the card from locking, the PIN can be reset by calling the customer service line or using the cardholder website.
- Let the WIC clinic know if they move or change address, so the correct zip code is connected to their eWIC account.

## Learning Activity

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Watch the [Protecting your eWIC Card](#) participant video and use the [Using Your Oregon eWIC Card](#) brochure and answer the following questions.



1. What do you think is the most important information to cover with cardholders?
2. Who should the cardholder contact if they want to change their WIC food benefits?
3. What kinds of things can damage the card?

## How does the store get paid for the WIC foods?

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Stores (vendors) must be approved and trained by the state WIC office before they can accept eWIC cards as a form of payment. When a cardholder uses an eWIC card to shop, it is just like using a debit card.

The store's cash register or point of sale device connects to WIC's banking contractor.

The banking contractor tells the store if the food being purchased is allowed and if the benefit is available to the cardholder.

Once the purchase is approved, WIC's banking contractor transfers payment to the vendor.

The data system gets real time information about purchases from the banking contractor, so WIC staff can find accurate up-to-the-minute information on the benefit balance for each participant.

## Learning Activity

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Go to the state WIC website ([www.healthoregon.org/wic](http://www.healthoregon.org/wic)) and click the “Find a WIC clinic or store” link. On the “Find a WIC Clinic or Store” web page, find your agency's clinics and the stores and pharmacies serving your area.





- Bookmark this web page on your computer.
- Are the stores where you shop on the list?
- What information can you find out about stores by clicking on them?

## Can we replace food benefits that have been purchased?

Most of the time the answer is no. Spent **food benefits** cannot be replaced under any circumstance.

**Formula benefits** may be replaced only when:

- Formula is purchased that cannot be used by the participant – the cardholder must bring in the unopened cans of incorrect formula to be exchanged.
- There has been a documented natural disaster (e.g. flood or earthquake) or other disaster like fire where the WIC formula is no longer available.
- The formula has been stolen –the cardholder must provide a police report or report number.
- A change in guardianship occurs – refer to [WIC Policy 451 – Change in Guardianship](#) for more information on changes in guardianship.
- The formula is in a location that compromises the safety of the cardholder (e.g., domestic violence) if they attempted to retrieve the formula.
- A participant transfers from another state and they did not receive food benefits for the current month from the other state or the food benefits from the other state are brought in for replacement with Oregon food benefits. For more information refer to [WIC Policy 511 - Food Benefit Issuance](#) and [WIC Policy 769- Assigning WIC Food Packages.](#)

NOTE: See WIC [Policy 561 – Program Integrity: Replacement of Food Benefits](#) for more information.

## Learning Activity

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Using [Policy 561](#), find the Replacing Unavailable/Stolen Formula form and list the situations when it needs to be completed.



## Skill Check – Self-Evaluation

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1. Using the [Attachment: What Successful Shoppers Need to Know](#), mark those items you feel comfortable explaining to cardholders.
2. We recommend that you try to use some of the shopping tools covered in this chapter. You may download the WICShopper app and click through the options on the app.
3. On your next shopping trip, you could use the [Job Aid: Helping Families Use the Benefits List](#), the [Shopping with your eWIC Card](#) brochure and the [WIC Food List](#) and try to find the WIC foods you might purchase if you were on WIC.
4. Talk with your training supervisor about what you think is most important for cardholders to know before they go to the store.
5. Ask your training supervisor about common shopping challenges expressed by participants in your agency. What are some tips you can give participants to prevent these challenges?



## 4-1 Glossary





## 4-1 Glossary

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### **Anthropometric**

Refers to measurements of the human body, e.g. height and weight.

### **Applicant Prescreening**

The process of determining income, residency and category eligibility for WIC before scheduling a WIC appointment to determine nutrition risk.

### **Authorized Food List**

Also called the *Food List*. The foods that have been approved by the state WIC office for participants to purchase when they are included in their food package.

### **Authorized Stores**

The stores that have been approved by the state WIC office to take eWIC cards as payment.

### **ADD**

Actual Delivery Date, or date of birth of the baby.

### **Bid Formula**

The brand of formula for which WIC currently has a contract. This formula must be offered as the first choice for WIC formula-fed infants.

### **C**

Child.

### **Caseload**

Number of participants WIC is serving each month.

### **Category**

The types of people who are eligible for WIC, including pregnant women, breastfeeding women, postpartum women, and infants and children under 5 years of age.

**Cert**

A short way of saying certification.

**Certification**

The process of determining whether or not a person qualifies for WIC services.

**Certification Period**

The amount of time a person is certified to be on WIC. The length of the certification period varies based on a participant's category.

**Certifier**

Another name for a Competent Professional Authority.

**Child**

For the purposes of WIC certification, a person is considered a child from their first birthday through the end of the month in which they turn five years old.

**Competent Professional Authority (CPA)**

A WIC staff person who determines if people are eligible for WIC based on their nutrition risk factors.

**EDD**

Estimated Delivery Date, or due date of a pregnancy.

**Electronic Benefits Account (EBA)**

An account established for each WIC family. The account number is the same as the WIC family ID number assigned to that family. Food benefits for all participants in the family are put into a single account.

**Eligibility**

Whether or not a person meets the criteria for WIC services.

**eWIC card**

Magnetic stripe card used to purchase WIC authorized foods or formulas from a WIC family's Electronic Benefit Account (EBA).

**Farm Direct Nutrition Program (FDNP)**

Also called the Farmers' Market program. A program which provides paper checks to purchase fresh fruits and vegetables from authorized farmers' markets and farm stands.

**Food Package**

The specific foods that will be issued to a particular WIC participant.

**Group Nutrition Education**

Nutrition education that is facilitated by a WIC staff person and offered to multiple participants at once.

**Strength-Based Nutrition Assessment**

A positive approach to assessment where the focus is on a desirable health outcome, rather than on deficiencies.

**Hematologic Information**

Refers to measurements of blood components, e.g. blood tests for anemia or lead.

**High Risk**

WIC participants with serious health or diet problems.

**IB**

Infant, breastfeeding, receiving some formula supplement.

**IE**

Infant, fully breastfeeding, no formula issued.

**IN**

Infant, non-breastfeeding, full formula package issued.

**Individual Follow-Up Appointment**

A one-on-one appointment with a CPA or the WIC Nutritionist.

**Infant**

For the purposes of WIC certification, a person less than 12 months old.

**Local Agency**

The main WIC office of your WIC program. Many local agencies have more than one WIC clinic.

**Nutrition Assistant**

Another name for a Competent Professional Authority.

**Nutrition Education (as defined in federal regulations):** Individual or group education sessions and the provision of information and educational materials designed to improve health status, dietary habits and physical activity habits, and to emphasize the relationships between nutrition, physical activity and health, all in keeping with the individual's personal, cultural, and socioeconomic preferences.

**Nutrition-Focused Counseling:** An interactive helping process focused on eating behaviors, physical activity, and lifestyle, designed to improve health status and help participants to achieve their personal goals.

**Nutrition Risk**

A health problem, medical condition, diet deficiency or other issue which can compromise the health or growth of a WIC participant.

**Paraprofessional CPA**

A Competent Professional Authority who has at least a high school diploma and is trained by WIC to learn how to certify and counsel WIC participants.

**Participant Centered Education (PCE)**

Counseling that focuses on people's capacities, strengths and developmental needs – not solely on their problems, risks, or negative behaviors.

**Permanent Clinic**

A WIC clinic that is regularly staffed and which has equipment that stays on site.

**Prescreening**

See Applicant Prescreening.

**Professional CPA**

A person with a bachelor's or master's degree in a health field who certifies and counsels WIC participants, usually a nurse, dietitian, nutritionist or health educator.



## **Public Health**

Public health is a field of study or an organization that promotes and protects the health of people and the communities where they live, learn, work and play.

## **Quarterly Nutrition Education Contacts**

Nutrition education offered to participants during their certification period (between certification appointments).

## **Recertification**

The process of reassessing to determine if a person is still eligible for WIC.

## **Risk Factors**

The codes or numbers used to identify specific nutrition risks.

## **Satellite Clinic**

A WIC clinic that is temporarily set up in a location (with equipment brought just for the day).

## **Service Area**

The geographical area served by a WIC clinic.

## **TWIST**

The WIC Information System Tracker. This is the computer data system Oregon WIC uses to collect and store participant data.

## **USDA**

The United States Department of Agriculture, the federal agency which funds WIC and sets the rules for the program.

## **Vendors**

See Authorized Stores.

## **WIC**

The Special Supplemental Nutrition Program for Women, Infants and Children.

## **WIC Clinic**

Your local WIC office.

**WB**

Woman, mostly or some breastfeeding, receiving some formula supplement for her infant.

**WE**

Woman, fully breastfeeding.

**WP**

Woman, pregnant.

**WN**

Woman, non-breastfeeding, postpartum.

## 4-2 Attachments



### **Certification and Nutrition Education Checklists**

- ◆ Applicant Prescreening
- ◆ Pregnant Woman
- ◆ Breastfeeding Woman
- ◆ Infant
- ◆ Child
- ◆ Recertification – Child
- ◆ Individual Follow-Up (Nutrition Education)
- ◆ Group Education (Nutrition Education)
- ◆ Breastfeeding Group for Pregnant Women (Nutrition Education)

### **What Successful Shoppers Need to Know**



# Attachment: Certification and nutrition education checklists

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## Applicant Prescreening

Observation	(x)	Comments/Questions
Screened for eligibility		
Collected basic participant info		
Scheduled appointment		
Informed what to bring to appointment		
Participant not eligible		

## Certification – Pregnant Woman

Observation	(x)	Comments/Questions
Check-in at front desk		
Collected basic participant info		
Proof of income, residency and ID		
Rights and Responsibilities		
Participant Signature Form		
Offered voter registration		
Height and weight		
Blood test		
Health history		
Diet information		
Nutrition education		
Next steps		
Risk factors		
Food package assignment		
Scheduled for quarterly nutrition education		
Referrals given		
Health outcome summary statement		
Food benefits and food list issued and instructed on use		
eWIC card issued and instructed on use		

## Certification – Breastfeeding Woman

Observation	(x)	Comments/Questions
Check-in at front desk		
Collected basic participant info		
Proof of income, residency and ID		
Rights and Responsibilities		
Participant Signature Form		
Offered voter registration		
Height and weight		
Blood test		
Health history		
Diet information		
Nutrition education		
Next steps		
Risk factors		
Food package assignment		
Scheduled for quarterly nutrition education		
Referrals given		
Health outcome summary statement		
Food benefits and food list issued and instructed on use		
eWIC card issued and instructed on use		

## Certification – Infant

Observation	(x)	Comments/Questions
Check-in at front desk		
Collected basic participant info		
Proof of income, residency and ID		
Rights and Responsibilities		
Participant Signature Form		
Height and weight		
Health history		
Diet information		
Nutrition education		
Next steps		
Risk factors		
Food package assignment		
Scheduled for quarterly nutrition education		
Referrals given		
Health outcome summary statement		
Food benefits and food list issued and instructed on use		
eWIC card issued and instructed on use		



## Certification – Child

Observation	(x)	Comments/Questions
Check-in at front desk		
Collected basic participant info		
Proof of income, residency and ID		
Rights and Responsibilities		
Participant Signature Form		
Height and weight		
Blood test		
Immunizations reviewed		
Health history		
Diet information		
Nutrition education		
Next steps		
Risk factors		
Food package assignment		
Scheduled for quarterly nutrition education		
Referrals given		
Health outcome summary statement		
Food benefits and food list issued and instructed on use		
eWIC card issued and instructed on use		

## Recertification – Child

Observation	(x)	Comments/Questions
Check-in at front desk		
Updated basic participant info		
Proof of income, residency and ID		
Rights and Responsibilities		
Participant Signature Form		
Height and weight		
Blood test		
Immunizations reviewed		
Health history		
Diet information		
Nutrition education		
Next steps		
Risk factors		
Food package assignment		
Scheduled for quarterly nutrition education		
Referrals given		
Health outcome summary statement		
Food benefits and food list issued and instructed on use		
eWIC card issued (if needed)		

## Individual Follow-Up (Nutrition Education)

Observation	(x)	Comments/Questions
Check-in at front desk		
Updated participant information		
Nutrition education provided		
Food benefits issued		
Documentation in data system		

## Group Education (Nutrition Education)

Observation	(x)	Comments/Questions
Check-in at front desk		
Nutrition education provided		
Food benefits issued		
Documentation in data system		

## Breastfeeding Group for Pregnant Women (Nutrition Education)

Observation	(x)	Comments/Questions
Check-in at front desk		
Breastfeeding education provided		
Food benefits issued		
Documentation in data system		



# Attachment: What successful shoppers need to know

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Local WIC staff must educate new eWIC cardholders on the correct use of the eWIC card in order for them to successfully access WIC food benefits and make the most effective use of programs. WIC staff can use their Participant Centered Services (PCS) skills to explore with the eWIC cardholder what they already know and which of the following information they need. Consider using the Explore – Offer – Explore technique to narrow down what the cardholder feels is most important to learn.

**What Successful Shoppers Need To Know**

No.	eWIC Objectives for Cardholders	Ensure that they know this:	Materials to help
1.	Cardholder can describe how they receive food benefits and where to spend them.	a. Food benefits for all family members on WIC will be combined (aggregated) into a single benefit balance.	Benefits list
		b. How to find out which stores, farm stands and farmers' markets in their area accept the eWIC card.	Find a WIC Clinic or Store website
		c. Foods purchased with eWIC will be debited from their benefit balance.	Benefits list
		d. How many and which month's benefits are being issued at this visit.	Benefits list
		e. The current month of benefits is the only one available for use.	Benefits list
		f. Unused benefits <b>do not</b> roll over to the next month.	Benefits list
		g. Benefit list will indicate when benefits become available and expire.	Benefits list

### What Successful Shoppers Need To Know

No.	eWIC Objectives for Cardholders	Ensure that they know this:	Materials to help
		h. Benefits are available at 12:01 a.m. Pacific Time on the first date available and expire at 11:59 p.m. Pacific Time on the last date.	Using your Oregon eWIC card brochure, when applicable
2.	Cardholder is able to list the options for checking their current benefit balance.	a. Benefit balance will always print on their cash register receipt and can be saved for later reference.	Using your Oregon eWIC card brochure, Shopping with your eWIC card brochure and video
		b. The different options for checking their benefit balance include: <ul style="list-style-type: none"> <li>• Last store receipt;</li> <li>• WICShopper App;</li> <li>• 24/7 Customer Service Phone line;</li> <li>• ebtEDGE website;</li> <li>• Printing benefit balance in store at identified register(s) or customer service desk;</li> <li>• Benefits List can be printed by the WIC office.</li> </ul>	Website and customer service number are on the back of the eWIC card, Using your Oregon eWIC card brochure, Shopping with your eWIC card brochure and video
		c. Check your balance before you get to the check stand and throughout the month.	Shopping with your eWIC card brochure, Checking your food balance video, Using your Oregon eWIC card brochure
3.	Cardholder is able to describe the	a. Brands and kinds of foods that are allowed or not allowed.	Food List

### What Successful Shoppers Need To Know

No.	eWIC Objectives for Cardholders	Ensure that they know this:	Materials to help
	foods they can purchase with their WIC food benefits.	b. No substitutions are possible. The cash register will only allow specific authorized foods or brands to be purchased with the eWIC card.	Shopping with your eWIC card brochure and video
		c. Not all stores stock all the brands on the Food List or all kinds of formula.	Explained by WIC staff, when applicable
		d. Shelf tags used by stores to identify WIC foods may not always be accurate or on all eligible foods. When in doubt, check the Food List to decide what you can buy.	Food List
		e. When applicable, explain the details of any special food benefit the participant is receiving (i.e. soy beverage or formula).	Benefits list, Food List when applicable
		f. When applicable, explain that only infant, child, and adult formulas and medical foods can be purchased at a pharmacy (like Walgreens). Pharmacies cannot accept eWIC for any other foods, including milk.	Explained by WIC staff when applicable
4.	Cardholder is able to identify the approved product package sizes of each food they can purchase with their food benefits or understands that certain foods must be purchased in	a. Explain which foods have a minimum package size (e.g. cereal; canned fish) and which must be purchased in a specific size container (e.g. juice, peanut butter, baby food).	Food List
		b. Foods will be debited from the balance in the units listed on the benefit balance. (ounces, ctrs, etc.)	Benefits list, , Checking your food balance video

### What Successful Shoppers Need To Know

No.	eWIC Objectives for Cardholders	Ensure that they know this:	Materials to help
	specific sizes.	c. Each food is listed in the units they can be purchased. Explain the units and abbreviations for the foods on the Benefits list. e.g.: CTR for PB or beans means a 16-18 oz. jar of beans or 16 oz. bag of beans.)	Shopping with your eWIC card brochure
		d. How to interpret gallons and fractions of gallons for fluid milk, e.g.: .5 gallon = ½ gallon.	Shopping with your eWIC card brochure
5.	Cardholder is able to state the correct use of the eWIC card at the store.	a. eWIC must be the first tender that will be debited, before SNAP, personal cards or cash.	Shopping with your eWIC card brochure and video
		b. Ask the store how to use your eWIC card the first time you shop there. Stores may process WIC transactions differently.	Shopping with your eWIC card brochure and video
6.	Cardholder is able to explain how to keep the eWIC card secure.	a. How to activate their card and set their PIN by calling the Customer Service line or logging in to the ebtEDGE website and using the cardholder data provided to the clinic (name, DOB, address including ZIP code).	Using your Oregon eWIC card brochure, Setting Your PIN video
		b. Keep the card in a safe place.	Using your Oregon eWIC card brochure, Protecting your eWIC card video
		c. Do not share the PIN with anyone and do not write the PIN on the card or in other places where it can be found.	Using your Oregon eWIC card brochure, Protecting your eWIC card video



### What Successful Shoppers Need To Know

No.	eWIC Objectives for Cardholders	Ensure that they know this:	Materials to help
		d. Change the PIN if it has been compromised.	Using your Oregon eWIC card brochure, Protecting your eWIC card video
		e. If a PIN is entered wrong four times, the card will be locked. The card can be unlocked at midnight. by calling Customer Service.	Using your Oregon eWIC card brochure, Protecting your eWIC card video
		f. Call the Customer Service line immediately to report a card lost or stolen or to deactivate a second card.	Using your Oregon eWIC card brochure, eWIC card, Protecting your eWIC card video
		g. Replacement cards can be requested and mailed from the Customer Service phone line or ebtEDGE website. Replacement cards can also be obtained in person at the WIC office.	Using your Oregon eWIC card brochure, Protecting your eWIC card video
7.	Participant is able to explain how to use the fruit and veggie benefit at the store or authorized eWIC farmers.	a. Benefit is for a specific dollar amount listed on the benefit balance.	Benefits list
		b. Can purchase more than the value of the benefit and pay the difference with another form of payment.	Shopping with your eWIC card brochure
8.	Participant is able to identify appropriate actions relating to WIC food benefit use.	a. Does not sell or attempt to sell eWIC card or foods.	Rights and Responsibilities
		b. Does not return foods purchased with the eWIC card to store for money or a different product.	Rights and Responsibilities

### What Successful Shoppers Need To Know

No.	eWIC Objectives for Cardholders	Ensure that they know this:	Materials to help
		c. Can't ask for or accept rain checks or IOUs.	Shopping with your eWIC card brochure
		d. Can use coupons, loyalty cards or buy one, get one specials.	Shopping with your eWIC card brochure
9.	Participant knows what to do when they have a problem at the check stand.	<p>a. Knows where to call:</p> <ul style="list-style-type: none"> <li>• Call the WIC clinic if you weren't allowed to purchase a food that you think is WIC eligible, if you have questions about your food benefits or if you received poor customer service at the store;</li> <li>• Call the Customer Service line if you had trouble using your card, need to reset your PIN, or need to dispute a transaction.</li> </ul>	Using your Oregon eWIC card brochure and Shopping with your eWIC card brochure
		b. Cardholder understands that any purchase of a food not authorized will automatically be rejected by the system and that the checker cannot override this.	Shopping with your eWIC card brochure and video
		c. If the system goes down, stores will not be able to do a manual eWIC transaction. Shopper will have to go to another store or come back when the system is up.	By WIC staff, as needed
10.	Participant is able to describe the functions of the second cardholder.	a. The first cardholder can designate someone to be a second cardholder for shopping, or bringing children to certifications or attending second NE. The first cardholder must provide WIC the second cardholder name, DOB, and address (including ZIP code) to be issued a card for them.	By WIC staff at card issuance

### What Successful Shoppers Need To Know

No.	eWIC Objectives for Cardholders	Ensure that they know this:	Materials to help
		b. The first cardholder is responsible for teaching the second cardholder how to use the card.	By WIC staff at card issuance and Protecting Your eWIC card video



## **4-3 Job Aids**



**Local WIC Staff**

**WIC Groups**

**Referrals**

**Overview of WIC Certification**

**WIC Income**

**Steps for Determining Income Eligibility**

**Helping Families Use the Benefits List**

**Compare first and Second Cardholders**



# Job Aid

## Local WIC Staff

*Use with Lesson 1-2*

Name	WIC Job	Work Phone Number or Extension	E-mail





# Job Aid

## WIC Groups

*Use with Lesson 2–1*

WIC Group Name	Type of Group	Languages Offered



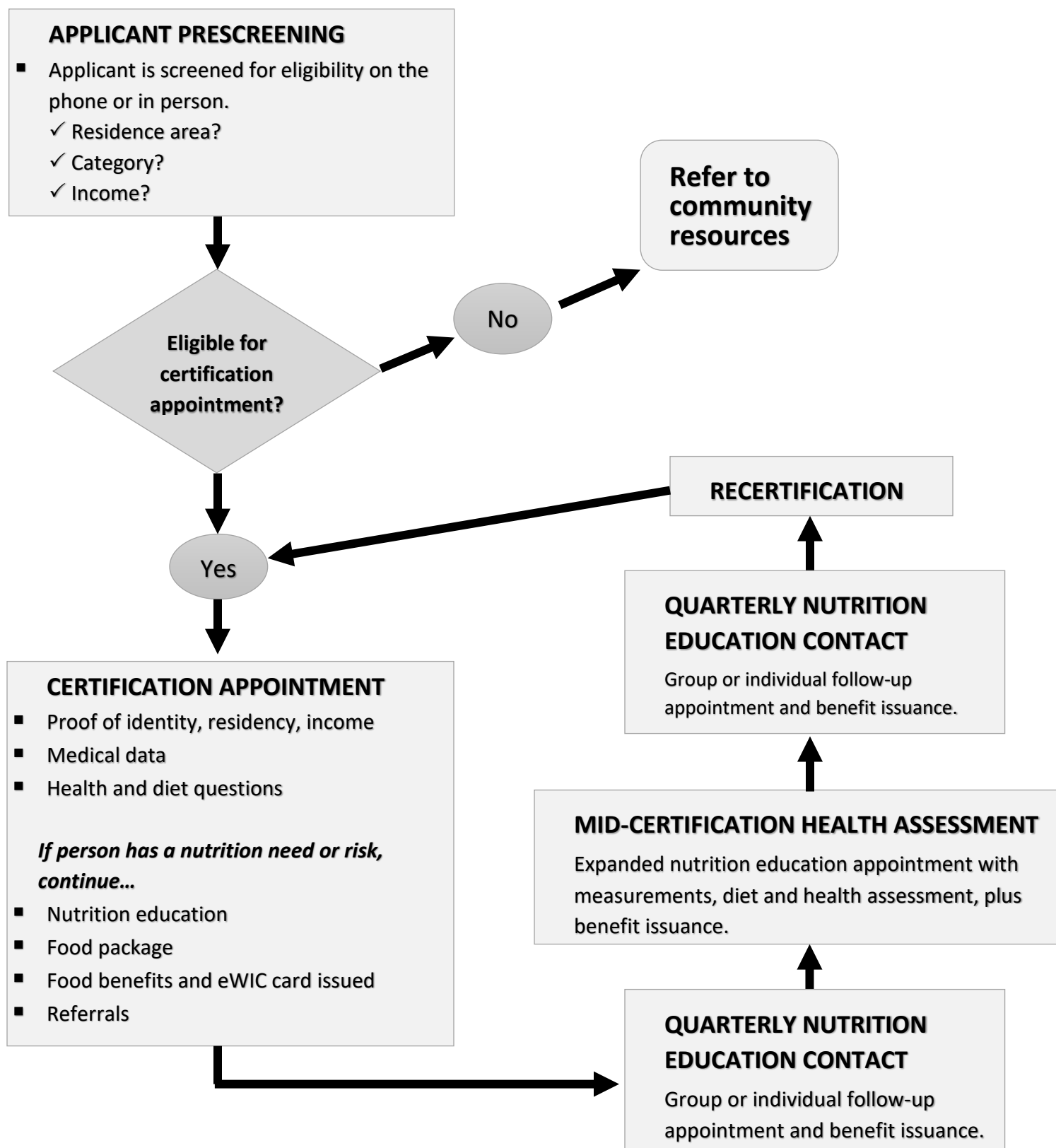
# Job Aid

## Referrals

*Use with Lesson 2–4*

Referral Topic	Name of Agency in Your Community	Contact Information
Alcohol Use / Rehabilitation		
Breastfeeding / Lactation Services		
Domestic Violence		
Drug Use / Rehabilitation		
Emergency Shelters		
Food Bank		
SNAP (Food Stamps)		
Health Clinics/ Physicians		
Head Start		
Housing		
Immunizations / Children's Shots		
OHP / Medicaid		
Smoking Cessation		
TANF / Welfare		







**Household**

- ◆ A person or group of people, related or not, who usually (though not necessarily) live together and whose income and consumption of goods and services are related.
- ◆ When determining the size of household for a pregnant WIC applicant, count each fetus as an additional household member, unless the woman specifically waives the increase in number.

**Income**

- ◆ Gross income, including overtime, before deductions for income taxes, employees' social security taxes, insurance premiums, bonds, etc.
- ◆ The determination of the amount of a household's gross income shall not be considered reduced for any reason (e.g., financial hardships, medical bills, child support).
- ◆ Individuals who can prove they are certified as fully eligible for Medicaid (the Oregon Health Plan), TANF, SNAP or FDPIR are considered automatically income eligible for WIC.

**Income Includes:**

1. Cash from salary (including overtime), wages, fees.
2. Net income from farm and non-farm self-employment.
3. Social security.
4. Dividends or interest on savings or bonds, estates, trusts, or net rental income.
5. Public assistance or TANF payments.
6. Unemployment compensation.
7. Government civilian employee or military retirement payments, or veteran's payments.
8. Private pensions or annuities.
9. Alimony or child support payment.
10. Regular contributions from persons not living in the household.
11. Net royalties.
12. Student loan amounts in excess of attendance costs. Attendance costs are regular tuition and fees for students carrying at least a half-time workload as determined by the institution, and allowance for books, supplies, and transportation required by the course of study.
13. Other cash income or allowances from any resources that are readily available to the household.

See WIC Policies 610 – 616 for more information about income eligibility.





# Job Aid

## Steps for Determining Income Eligibility

Use with Lesson 3–3

The screenshot shows the 'Income Eligibility' screen in the TWIST system. At the top, there is a 'Selection' tab and a header section with fields for WIC ID (00753245-01), Name (Seaside, Samantha A), DOB (03/01/1990), WIC Cat (WOMAN, PREGNANT), and Tr.Type (C). Below this is a navigation bar with 'Income Eligibility' selected, along with 'WIC Intake' and 'WIC Notes' tabs. The main section is titled 'Income Eligibility' and contains several input fields: 'Calculate Income For' (FAMILY), 'Proof of ID' (DRIVERS LICENSE), 'Proof of Residency' (UTILITY BILL), 'No In Family' (4), 'Unborn Counted' (1), 'New Income Date' (04/06/2016), 'Participates In' (SNAP: YES, Oregon Health Plan: YES, TANF: YES), 'Income Completed By', 'Eligibility Pending', and 'Eligibility Pending Date'. At the bottom, there is a table with columns: Income Provider, Interval, Amount, Source, Proof of Income, Monthly, and Annual. The table contains one row for 'HUSBAND' with a monthly amount of 832.00 from 'WAGES' using a 'PAY STUB' as proof, resulting in a monthly total of 832.00 and an annual total of 9,984.00. Three numbered callouts are present: 1 points to the 'Calculate Income For' dropdown, 2 points to the 'Participates In' section, and 3 points to the 'Proof of Residency' dropdown.

Follow these steps when entering information on the TWIST “Income Eligibility” screen.

**Step 1** Is this income for a “family” or for a foster child “client?”

**Step 2** What is their proof of ID and residency?

What proof of ID and address do you have today?

**Step 3** What is their household size?

◆ For prenatal women, enter number of fetuses in “Unborn Counted” field.

How many people live with you?

**Selection**

WIC ID: 00753245-01 Name: Seaside, Samantha A DOB: 03/01/1990 WIC Cat.: WOMAN, PREGNANT Tr.Type: C

Income Eligibility ☒ WIC Intake ☒ WIC Notes

**Income Eligibility**

Calculate Income For: FAMILY Proof of ID: DRIVERS LICENSE Proof of Residency: UTILITY BILL

No In Family: 4 Unborn Counted: 1 New Income Date: 04/06/2016

Participates In: SNAP: YES Oregon Health Plan: YES TANF: YES

Income Completed By: Eligibility Pending: Eligibility Pending Date:

Income Provider	Interval	Amount	Source	Proof of Income	Monthly	Annual
HUSBAND	MONTHLY	832.00	WAGES	PAY STUB	832.00	9,984.00
<b>Totals:</b>					832.00	9,984.00

**Step 4 Does the participant participate in an adjunctively eligible program? Note the programs the participant uses.**

- ◆ If there is proof that the participant is currently participating in one of the programs, the participant is income eligible.

Do you or your child receive TANF, SNAP, or OHP?

Did you bring proof of participation in that program?

**Step 5 What is the monthly income for the household?**

- ◆ Enter the income from all sources.
- ◆ Enter declared income for adjunctively eligible participants.
- ◆ TWIST calculates total monthly income and compares it to the WIC Income Guidelines.
- ◆ TWIST allows you to continue with certification only if the participant is income eligible.

What is the monthly income of your household?

What proof of income do you have?

**Step 6 Does the participant need to bring back proof later?**

- ◆ Use the “Eligibility Pending” checkbox and complete a “No Proof” form if participant does not have proof of ID, residency or income.
- ◆ Make sure they know what proof to bring back and the date it needs to be returned by.

# Job Aid

## Helping Families Use the Benefits List

### How would you use the Benefits List to help WIC families?

Who is the cardholder?

#### WIC Benefits List

Benefits Available as of 09/04/2020 1:17 PM

When was this list printed?

WIC Family ID: 2100181

FirstCardholder: SAMPLE, SARA

SecondCardholder: SAMPLE, STEVE

Benefits for: 09/04/2020 through 09/30/2020

Family Member/s: Sample, Sara – WB

Sample, Sam – C1

Sample, Suzy – IB7-12

Which months have benefits issued?

How much of each food are they getting?

Which family members have benefits?

What foods are they getting?

Quantity	Unit	Food Item Description
20	\$\$\$	Fruit and vegetables –fresh / frozen
48	OZ	Whole grains
4.5	GAL	Fat free or 1% milk
3.25	GAL	Whole milk
2	LB	Cheese
1	CTR	Lowfat or Nonfat yogurt
2	DOZ	Eggs – large
2	CTR	Peanut butter/dry or canned beans
1	CTR	Beans, dry or canned
72	OZ	Cereal – hot / cold
2	CTR	11.5 to 12 ounce frozen juice
3	CTR	64oz bottle juice
128	OZ	Baby food – fruit / vegetables
24	OZ	Baby cereal
2	CAN	Simillac Advance powder

Benefits for: 10/01/2020 through 10/31/2020

Family Member/s: Sample, Sara—WB

Sample, Sam – C1

Sample, Suzy – IB7-12

How many future months of benefits are issued?

Quantity	Unit	Food Item Description
20	\$\$\$	Fruit and vegetables –fresh / frozen
48	OZ	Whole grains
4.5	GAL	Fat free or 1% milk
3.25	GAL	Whole milk
2	LB	Cheese
1	CTR	Lowfat or Nonfat yogurt
2	DOZ	Eggs – large
2	CTR	Peanut butter/dry or canned beans
1	CTR	Beans, dry or canned
72	OZ	Cereal – hot / cold
2	CTR	11.5 to 12 ounce frozen juice
3	CTR	64oz bottle juice
128	OZ	Baby food –fruit / vegetables
24	OZ	Baby cereal
2	CAN	Simillac Advance powder

Are family members benefits combined?

Your next appointment will be \_\_\_\_\_ Your WIC clinic phone number is (503) 988-3503.

When should they come back to the clinic?

## Types and Units of Foods

Food Category	Short Description	Long Description	Unit of measure	Measure Description
<b>Cheese</b>	Cheese	Cheese	LB	pound
<b>Eggs</b>	Eggs- large	Eggs – large	DOZ	dozen
<b>Cereal</b>	Cereal – hot/cold	Cereal – hot/cold	OZ	ounce
<b>Peanut butter or beans, dry or canned</b>	Peanut butter/beans	Peanut butter/dry or canned beans	CTR	container 1 CTR=16-18 oz. PB or 16 oz. beans
<b>Dry beans or peas, Canned beans</b>	Beans, dry or canned	Beans, dry or canned	CTR	Container 1 CTR=16 oz.
<b>Fish</b>	Fish – canned	Fish – canned tuna/salmon/sardines	OZ	ounce
<b>Bread or whole grains</b>	Whole grains	100% whole wheat bread or whole grains	OZ	ounce
<b>Fruit and vegetables</b>	Fruit and vegetables	Fruit and vegetables – fresh/frozen	\$\$\$	Amount in dollars and cents example: \$10.00
<b>Whole fluid milk</b>	Whole milk	Whole milk	GAL	1.0 = 1 gallon
<b>Fat free or 1% Milk</b>	Lowfat milk	Lowfat or fat free milk	GAL	1.0 = 1 gallon
<b>Soy beverage</b>	Soy beverage	Soy beverage	GAL	1.0 = 1 gallon
<b>Juice – 11.5-12 oz.</b>	Frzn juice 11.5-12 oz.	11.5 to 12 ounce frozen juice	CTR	container 1 CTR = 11.5-12 ounces frozen
<b>Juice – 64 oz.</b>	Juice 64 oz.	64 oz. bottle juice	CTR	container 1 CTR = 64 oz. plastic bottle
<b>Formulas</b>	Varies	Varies	CAN, BTL, CTR, BOX, CTN	Can, bottle, container, box, carton
<b>Baby cereal</b>	Baby cereal	Baby cereal	OZ	ounce
<b>Baby food fruits and vegetables</b>	Baby food – fruit/veg	Baby food – fruit/vegetables	OZ	ounce
<b>Baby food – meat</b>	Baby food – meat	Baby food – meat	OZ	Ounce
<b>Lowfat or nonfat yogurt</b>	Low or nonfat yogurt	Lowfat or nonfat yogurt	CTR	1 CTR = 32 oz.
<b>Whole milk yogurt</b>	Whole milk yogurt	Whole milk yogurt	CTR	1 CTR = 32 oz.
<b>Tofu</b>	Tofu	Tofu	LB	16 oz. (1 lb.)

# Job Aid

## Compare First and Second Cardholders

	First Cardholder	Second Cardholder
<b>Required?</b>	Required for every account	Optional
<b>When</b>	Must be added to 'TWIST' and issued a card at first appointment	May be added to 'TWIST' and issued a card at anytime
<b>Who</b>	Must be the adult participant or the parent/caretaker of infant/child participants	Can be whomever the first cardholder selects
	Must be a part of the participants' household	Does not need to be a part of the participant's household
	Cannot also be second cardholder	Cannot also be first cardholder
	Cannot be a WIC staff person (unless they are a participant or family member of the participant)	Cannot be a WIC staff person (unless they are a participant or family member of the participant)
<b>Address</b>	Defaults to the family address in 'TWIST' Client Master Demographics	Any address can be used
<b>Roles</b>	Can bring in infant/child for recerts and follow up appts	Can bring in infant/child for recerts and follow up appts
	Can make and change appts	Can make and change appts
	Can attend NE	Can attend NE
	Can make changes to food package	Can make changes to food package
	Can purchase WIC foods with eWIC card	Can purchase WIC foods with eWIC card
	Can report their own card lost, stolen, or damaged	Can report their own card lost, stolen, or damaged
	Can access account benefit balance and transaction information from the customer service line or cardholder website	Can access account benefit balance and transaction information from the customer service line or cardholder website
	Can select and change the second cardholder	Cannot make any changes to cardholders
	Can transfer participants to another agency or out of state	Cannot transfer participants
	Can discontinue WIC services for family	Cannot discontinue WIC services for family

