



Oregon WIC Program — Observation Review Tool – Tally Sheet



Agency: _____

Reviewer: _____

Date: _____

Total Observations: _____

C = Compliance QA = Quality Assurance N/A = Not Applicable

Observation Review Tool – Certification			Total NOs	Total relevant charts	% NO	Comments
INTAKE						
1	C	Participant confidentiality is maintained throughout certification process.				
2	C	Appropriate proofs are requested and provided (e.g., ID, income/adjunctive eligibility, residency).				
3	C	Participant being certified is physically present for the visit.				
4	C	Rights and Responsibilities are explained to the Participant.				
5	C	OHP referral is made as appropriate.				
6	C	The Participant Signature form is signed by the participant and a copy is filed.				
7	C	Voter registration is offered as appropriate.				
8	C	Infant/child participants are screened for Immunization status using a documented record as appropriate.				
9	C	Infant/child participants are referred if at risk for under-immunization according to policy.				



Oregon WIC Program — Observation Review Tool – Tally Sheet



Observation Review Tool – Certification			Total NOs	Total relevant charts	% NO	Comments
CERTIFICATION ASSESSMENT						
10	C	Height/length measurements are taken and documented correctly.				
11	C	Weight measurements are taken and documented correctly.				
12	C	Biochemical measurements are taken correctly and are within the required timeline.				
13	C	CPA completes a full health assessment using critical thinking.				
14	C	CPA completes a full diet assessment using critical thinking.				
CERTIFICATION COUNSELING						
15	C	Elements of participant centered education are demonstrated.				
Skills that staff use well.						
Areas that could be strengthened.						
16	C	Pregnant women are encouraged to breastfeed.				
17	C	The nutrition counseling topics and materials offered relate to the nutrition risk, category and/or the participant’s interests or concerns.				
18	C	The participant is actively involved in determining next steps for improving health outcomes.				



Oregon WIC Program — Observation Review Tool – Tally Sheet



Observation Review Tool – Certification			Total NOs	Total relevant charts	% NO	Comments
19	C	A connection is made between the participant’s program eligibility and desired health outcomes.				
20	C	Second NE is offered/discussed with participant.				
21	C	The protocol for referral to high-risk counseling is followed appropriately.				
BENEFIT ISSUANCE						
22	C	Benefit issuance use is explained to new participants.				
23	QA	Returning participants are asked if they have any questions or problems with shopping.			/	
24	C	There is a separation of duties by staff doing eligibility determination and benefit issuance.				
TWIST OBSERVATION						
25	C	Participant attendance is documented for this appointment.				
26	C	Are proofs documented correctly and if applicable, “eligibility pending” checked?				
27	C	Is health questionnaire completed for all mid-cert health assessments?				
28	C	Is diet questionnaire completed for all mid-cert health assessments?				
29	C	Quarterly nutrition education appointment is documented appropriately.				
30	C	If high-risk appointment, the care plan was documented appropriately.				



Oregon WIC Program — Observation Review Tool – Tally Sheet



Observation Review Tool – Certification			Total NOs	Total relevant charts	% NO	Comments
31	C	All applicable nutritional risks are determined.				
32	C	Appropriate documentation exists for manually assigned nutrition risks.				
33	C	NE provided was documented appropriately.				
34	C	The food package assignment fits the participant’s category and nutritional risk.				

Observation Review Tool – Group Education			Total NOs	Total relevant charts	% NO	Comments
GROUP EDUCATION						
34	C	Does the program have NE lesson plans on file?				
35	C	Was the intent or main objectives of the lesson covered by the instructor?				
36	C	Were the participant’s cultural/language needs met?				
37	C	Was participant attendance documented in TWIST?				
38	C	Were elements of Participant Centered Education demonstrated?				