

WIC Coordinator Training Checklist

Rev. 8/21/2019

| | |
|----------------------------|--|
| Agency | |
| Coordinator | |
| State nutrition consultant | |

As the WIC Coordinator for your local agency, you have the overall responsibility for your WIC program. The [WIC Coordinator Competencies](#) document identifies the duties of a WIC Coordinator. As noted in that document, several of the competencies are similar to those of a WIC certifier, but many are unique for the WIC Coordinator. This checklist identifies the tasks needed to meet the competencies.

The checklist is divided into three sections:

1. Complete within first month as WIC Coordinator and prior to meeting with State Nutrition Consultant [page 1](#)
2. Complete during meeting with State Nutrition Consultant [page 6](#)
3. Complete one month after meeting with State Nutrition Consultant [page 8](#)

This training is designed to be completed within your first three months as a WIC Coordinator.

Complete within first month as WIC Coordinator and prior to meeting with State Nutrition Consultant:

If you already have WIC experience and are very familiar with how WIC works in your agency, this first section may be very easy for you to complete. If you are just starting your career in WIC, this first section will help you become familiar with the basics of the WIC Program and your agency services.

| # | Getting Started | Done |
|----|---|------|
| 1. | Provide contact information to agency state assigned Nutrition Consultant | |
| 2. | Obtain access to data system | |
| 3. | Get a data system navigation overview, if needed | |
| 4. | Obtain access to iLearn as an Oregon Health Authority Partner | |
| 5. | Locate and explore the Oregon WIC website <ul style="list-style-type: none"> • Oregon Policy and Procedure manual (PPM) • WIC Coordinators Page | |

| # | WIC & FDNP Overview | Done |
|-----|---|------|
| 1. | Complete Orientation to WIC Course (includes paper and online sections) | |
| 2. | Complete Participant Centered Services – Setting the Stage Module | |
| 3. | Review policy 600 Certification Introduction and Overview Review policy 511 Food Benefit Issuance Review policy 1000 Overview of Vendor Management | |
| 4. | Observe clinic flow including check-in procedures and certification process. | |
| 5. | Observe benefit issuance and shopper education | |
| 6. | Nutrition Education <ul style="list-style-type: none"> Review policy 810 Nutrition-focused Education and Counseling Review policy 820 Quarterly Nutrition Education Contacts Review quarterly nutrition education opportunities for participants Observe individual quarterly nutrition education appointments (IE, FU) Observe group education (GE) Review local policy and procedure for use of online nutrition education lessons Review local policy and procedure for use of self-paced lessons (if applicable) | |
| 7. | Breastfeeding: <ul style="list-style-type: none"> Complete “Breastfeeding Level 1” online course | |
| 8. | Referrals: <ul style="list-style-type: none"> Review policy 880 Referrals: Alcohol, Tobacco & Other Drug Use Review policy 885 Other Referrals: Required and Recommended Observe immunization screening and referrals Review local referral list | |
| 9. | Food Package: <ul style="list-style-type: none"> Complete Food Package module | |
| 10. | Farmers Market Nutrition Program (FDNP) <ul style="list-style-type: none"> Review policy 1100 Farm Direct Nutrition Program: Local Program Responsibilities | |
| 11. | Clinic Locations <ul style="list-style-type: none"> Identify services provided at satellite or out clinic sites, including clinic hours and locations Identify phone hours and accessibility Determine if WIC services are provided outside of the clinic, e.g during home visits <ul style="list-style-type: none"> Review policy 621 Providing WIC Services During Home Visits | |
| 12. | Nutrition Services Plan <ul style="list-style-type: none"> Review policy 850 Nutrition Services Plan Review current year’s Nutrition Services Plan Review evaluation of previous year’s Nutrition Services Plan | |

Caseload management

| # | Caseload management | Done |
|----|---|------|
| 1. | Review policy 325 Caseload Management Review policy 605 Processing Standards | |
| 2. | Complete Introduction to Caseload Module | |
| 3. | Run and review data system caseload reports | |
| 4. | Review show rate reports | |
| 5. | Review agency staffing patterns | |
| 6. | Review appointment availability <ul style="list-style-type: none"> Review policy 475 Waiting List | |
| 7. | Outreach <ul style="list-style-type: none"> Review policy 470 Local Program Outreach: Note annual requirement in addition to ongoing outreach Review outreach plan and outreach log | |

Local agency staffing

| # | Local agency staffing tasks | Done |
|----|---|------|
| 1. | Staffing <ul style="list-style-type: none"> Review policy 435 Staffing Requirements Identify which staff are fulfilling the following required roles: <ul style="list-style-type: none"> Registered dietitian nutritionist (RDN) staff Breastfeeding coordinator Training supervisor Identify number of FTEs for each role in the agency Identify number of bilingual staff and languages Review racial /ethnic report in the data system Review language spoken report in the data system | |
| 2. | Staff Roles/Requirements CPA: <ul style="list-style-type: none"> Review policy 660 Competent Professional Authority (CPA) Requirements Review policy 661 Competent Professional Authority: Appropriate Counseling for Risk Levels WIC Nutritionist/ RDN: <ul style="list-style-type: none"> Review policy 830 Nutrition Counseling and Services for High-Risk Participants Breastfeeding Coordinator: <ul style="list-style-type: none"> Review policy 710 Breastfeeding: Definition, Promotion, and Support Standards Training Supervisor: <ul style="list-style-type: none"> Review policy 440 Staff Training Requirements for Training Supervisor role | |
| 3. | Training <ul style="list-style-type: none"> Review Nutrition Services Plan for quarterly continuing education in-services scheduled for the year | |

| # | Local agency staffing tasks | Done |
|---|---|------|
| | <ul style="list-style-type: none"> • Review policy 440 Staff Training Requirements <ul style="list-style-type: none"> ○ Identify strategies used in the past for training staff at this agency • Review policy 660 Competent Professional Authority (CPA): Requirements <ul style="list-style-type: none"> ○ Review Competent Professional Authority (CPA) competency model (Appendix A) • Review current staff training <ul style="list-style-type: none"> ○ Review module completed/uncompleted report in data system ○ Review local agency training log ○ Review recent in-services required by the State | |

Program integrity

| # | Program integrity tasks | Done |
|----|---|------|
| 1. | Review written local agency procedures <ul style="list-style-type: none"> • Review policy 420 Approval Process for Local Program Policies and Procedures | |
| 2. | Review policy 501 Ordering and Securing eWIC Cards <ul style="list-style-type: none"> • Review monthly inventory for eWIC card stock • Review security of eWIC cards in storage, and during breaks, mealtimes and overnight | |
| 3. | Employee Responsibilities <ul style="list-style-type: none"> • Review policy 596 Program Integrity: Acknowledgement of Employee Responsibilities • Complete Employee Responsibility signature form (policy 596, App. A) • Identify agency process for annual signing and retention of Employee Responsibility signature forms | |
| 4. | Civil Rights <ul style="list-style-type: none"> • Complete Civil Rights Training as defined in policy 452 Civil Rights • Review policy 452 Civil Rights • Review outreach materials for discrimination statement • Assess physical setting for ADA accessibility • Identify availability of materials for major language groups served by the agency • Locate Justice for All Poster and Moving notification poster in each clinic site | |
| 5. | Review recent time studies <ul style="list-style-type: none"> • Review policy 316 Quarterly Breakout of Staff Time | |
| 6. | Separation of Duties <ul style="list-style-type: none"> • Review policy 595 Separation of Duties • Review system for separation of duties and audit review every 2 weeks. | |
| 7. | Homeless facilities/institutions <ul style="list-style-type: none"> • Review policy 655 Homeless Applicants • Identify facilities/institutions in service area that may serve WIC participants | |

| # | Program integrity tasks | Done |
|---|---|------|
| | <ul style="list-style-type: none"> Review documentation of communications with facility ensuring WIC services benefit the WIC participant and not the facility | |

Local program operations

| # | Local program operations task | Done |
|----|---|------|
| 1. | Local agency biennial review and self-audit <ul style="list-style-type: none"> Review policy 215 Local Program Monitoring and Review Review most recent biennial agency review report and Corrective Action Plan (CAP) Review materials from most recent agency self-audit | |

Complete during meeting with State Nutrition Consultant

WIC program overview

| # | WIC program overview tasks | Done |
|---|----------------------------|------|
| 1 | Discuss clinic processes | |

Caseload management

| # | Caseload management tasks | Done |
|---|--|------|
| 1 | Review caseload basics | |
| 2 | Discuss caseload reports in the data system | |
| 3 | Review fiscal training and Council of Local Health Officials (CLHO) funding formula | |
| 4 | Outreach: <ul style="list-style-type: none">Review outreach planDiscuss differences between regular outreach and annual media outreach to inform potential participants, particularly high-risk populations, of availability of WIC | |

Local agency staffing

| # | Local agency staffing tasks | Done |
|---|---|------|
| 1 | Discuss staff training plan | |
| 2 | Review Competent Professional Authority (CPA) competency model | |
| 3 | Review module completed/uncompleted report in data system | |
| 4 | Discuss documentation of staff training | |
| 5 | Checklists for onboarding & exiting staff | |
| 6 | TWIST CPA Training, TWIST Clerical Training and Level 3 Certifier Academy | |

Nutrition Education

| # | Nutrition education tasks | Done |
|---|---|------|
| 1 | Discuss local agency breastfeeding support and promotion | |
| 2 | Review quarterly nutrition education opportunities for participants | |
| 3 | Review use of participant centered education (PCE) in groups and individual interactions | |
| 4 | Discuss nutrition education provided by non-WIC programs, required written agreements, documentation of attendance and nutrition education topics and benefits issuance | |
| 5 | Review Nutrition Services Plan | |

Program integrity

| # | Program integrity tasks | Done |
|---|--|------|
| 1 | Review recent time studies | |
| 2 | Nutrition education & breastfeeding promotion expenditures | |
| 3 | Determine how policy updates will be communicated and implemented | |
| 4 | Discuss how state communications are shared with staff (e.g. email groups, Fridays mailings) | |

| # | Program integrity tasks | Done |
|---|---|------|
| 5 | Review complaint procedure (TWIST Manual, Ch. 8, p. 103.1-103.14) | |
| 6 | Review separation of duties procedure | |

Data system use

| # | Data system tasks | Done |
|---|---|------|
| 1 | Completing chart audits | |
| 2 | Printing reports YouTube: How to Run Caseload Reports | |
| 3 | Maintaining user IDs and passwords | |
| 4 | Updating staff information (TWIST Manual, Ch 8 p. 101.1-101.20) | |
| 5 | Entering training module completion (TWIST Manual, Ch. 8, p. 101.13-101.18) | |
| 6 | Updating clinic information (TWIST Manual, Ch 8 p. 100.1-100.17) | |
| 7 | Updating referral organizations (TWIST Manual, Ch 8 p. 102.1-102.13) | |

Local program operations

| # | Local program operations tasks | Done |
|---|--|------|
| 1 | Discuss most recent state local agency review | |
| 2 | Discuss self-evaluation of program operations of all clinic sites, at a minimum in year opposite LA review Review most recent agency self-audit materials | |
| 3 | Review use of participant centered service (PCS) for providing customer service | |
| 4 | Review minimum competency in participant centered skills | |
| 5 | Review Farm Direct Nutrition Program (FDNP) procedures | |

Utilizes resources

| # | Using resources tasks | Done |
|---|---|------|
| 1 | Review available state resources, including WIC Shopify Store | |
| 2 | Review state contact information | |
| 3 | Identify process for reimbursement of travel for meeting or training attendance | |

Leadership

| # | Leadership tasks | Done |
|----|---|------|
| 1 | Review state annual report and county data sheets on the Oregon WIC website | |
| 2 | Discuss interest in mentoring from an experienced coordinator | |
| 3 | Provide information on the Oregon WIC Coordinators Association (OWCA) and their meeting schedule | |
| 4. | Request to join OWCA Basecamp Group | |
| 5. | Provide WIC Calendar of Events and information about WIC Advisory Board, Vendor Advisory Board, Training Supervisors, LAWN, NEWS and Breastfeeding Coordinators | |

Complete one month after meeting with State Nutrition Consultant:

WIC program overview

| WIC Program Overview Tasks | | Done |
|----------------------------|---|------|
| 1 | Review policy 510 WIC Cardholder Requirements | |
| 2 | Observe collecting proofs of residency, identity and income <ul style="list-style-type: none"> Review policy 610 Required Proofs – Identity, Residency, Income Review policy 611 Income Eligibility: Determining Income Eligibility Review policy 612 Income Eligibility: Adjunct or Automatic Income Eligibility Review policy 613 Income Eligibility: What counts as income? Review policy 614 Income Eligibility: Current Income Guidelines Review policy 615 Income Eligibility: Change in Income Review policy 616 Unavailable Proofs | |
| 3 | Review special situations <ul style="list-style-type: none"> Review policy 451 Change in Guardianship | |
| 4 | Measurements and bloodwork <ul style="list-style-type: none"> Observe completing measurements and bloodwork Complete Anthropometric Online Course Review policy 628 Anthropometric Screening Review WIC documentation sticker on each scale showing annual calibration Complete Hematologic Online Course Review policy 626 Hemoglobin and Hematocrit Screening Review agency documentation of routine cleaning, room temperature of microcuvettes and posting of current CLIA certificate or waiver per Policy 626 | |
| 5 | Review certification requirements <ul style="list-style-type: none"> Review policy 625 Risk Assessment Review policy 645 Certification Periods Review policy 646 Mid-Certification Health Assessment Review policy 670 Overview of Risk Criteria and Priorities Review policy 675 Risk Criteria: Codes and Descriptions Complete Nutrition Risk Module | |
| 6 | Understand WIC food packages <ul style="list-style-type: none"> Review policy 769 Assigning WIC Food Packages Review policy 770 Authorized Foods Review policy 765 Medical Documentation Observe clinic process for review and storage of medical documentation forms Review policy 733 Formula Warehouse Identify agency procedure for formula warehouse orders | |

Caseload management

| Caseload management tasks | | Done |
|---------------------------|---|------|
| 1 | Identify procedures for appointment notification | |
| 2 | Utilize appointment scheduler <ul style="list-style-type: none"> Identify staff responsible for appointment scheduling Determine schedule for running auto scheduler Review appointment templates Review appointment scheduler reports in data system Review ANWR System | |
| 3 | Caseload Monitoring and Management Identify monthly process for monitoring and managing caseload | |
| 4 | Review WIC funding process <ul style="list-style-type: none"> Review policy 300 Fiscal Overview Review policy 305 Funding Formula Review Fiscal 101 document | |

Local agency staffing

| Local agency staffing tasks | | Done |
|-----------------------------|---|------|
| 1 | Review Certifier's Guide | |
| 2 | Complete Adverse Childhood Experiences (ACEs) online course | |

Nutrition Education

| | | Done |
|----|---|------|
| 1 | Complete Participant Centered Education Online Course - 9 parts | |
| 2 | Observe a high-risk appointment <ul style="list-style-type: none"> Review Policy 830 Nutrition Counseling and Services for High-Risk Participants Review local agency high risk counseling procedure (criteria in Policy 661) | |
| 3 | Review policy 840 Documentation for Nutrition-Focused Education and Counseling | |
| 4 | Observe prenatal certification | |
| 5 | Observe breastfeeding group | |
| 6 | Observe breastfeeding consultation | |
| 7 | Observe breast pump issuance | |
| 8 | Review breastpump security Review breastpump tracking and documentation data system | |
| 9 | Observe a breastfeeding peer counseling group (if applicable) <ul style="list-style-type: none"> Review policy 716 Breastfeeding Peer Counseling (BFPC) Program Requirements | |
| 10 | Discuss local agency breastfeeding support and promotion Observe clinic environment for breastfeeding friendly characteristics | |
| 11 | Review written agreement(s) if nutrition education provided by non-WIC program(s) | |

Program integrity

| Program integrity tasks | | Done |
|-------------------------|--|------|
| 1 | <p>Record Retention</p> <ul style="list-style-type: none"> Review policy 426 Record Retention Identify location of form retention for participant signature forms, med doc, etc. | |
| 2 | <p>Confidentiality & Privacy</p> <ul style="list-style-type: none"> Observe procedures to protect participant confidentiality Review policy 450 Confidentiality | |
| 3 | <p>Voter Registration</p> <ul style="list-style-type: none"> Review policy 480 Voter Registration – National Voter Registration Act Observe offering of voter registration, using required language Locate voter registration forms Identify who submits completed registration cards Identify who submits monthly online report to Sec of State Elections Division | |
| 4 | Review policy 561 Program Integrity: Replacement of Food Benefits | |
| 5 | <p>Review complaint procedure</p> <ul style="list-style-type: none"> Review policy 588 Program Integrity: Complaints | |
| 6 | Review policy 590 Program Integrity: Participant Violations | |
| 7 | <p>Review policy 620 Certification and Issuing Benefits or eWIC Cards to Themselves, Co-workers, Relatives or Friends</p> <ul style="list-style-type: none"> Identify clinic procedure when staff, co-worker, relative or friend on WIC | |
| 8 | <p>Identify agency ordering procedures</p> <ul style="list-style-type: none"> Review policy 627 Procedures for Ordering HemoCue Supplies | |
| 9 | <p>Observe staff reviewing rights and responsibilities with participants</p> <ul style="list-style-type: none"> Review policy 635 Participation Notification: Eligibility, Rights and Responsibilities | |
| 10 | <p>Identify staff responsible for printing and mailing termination/graduation letters</p> <ul style="list-style-type: none"> Review policy 636 Participant Notification: Ineligibility and Termination from WIC | |
| 11 | <p>Review policy 712 Breastfeeding: Breast Pump Ordering, Distribution, and Tracking Guidelines</p> <p>Identify local agency breast pump storage, issuance, documentation & tracking procedures.</p> | |
| 12 | Review policy 713 Breastfeeding: Use of Supplemental Formula | |
| 13 | <p>Review policy 735 Exchange and Handling of Returned Formulas</p> <ul style="list-style-type: none"> Review clinic procedure for returned formula | |

Local program operations

| Local program operations tasks | | Done |
|--------------------------------|---|------|
| 1 | <ul style="list-style-type: none"> Review agency procedures for Farm Direct Nutrition Program (FDNP) check security and issuance Identify agency liaison with state FDNP coordinator Identify location of FDNP check registers for past three years Identify physical inventory of FDNP checks during FDNP season | |
| 2 | Review minimum competency in participant centered skills and use of participant centered education (PCE) in groups and individual interactions | |

Utilizes resources

| Using resources tasks | | Done |
|-----------------------|---|------|
| 1 | Review Oregon WIC website pages for staff, coordinators and medical providers | |
| 2 | Review state contact information | |
| 3 | Explore National WIC Association (NWA) website | |

Leadership

| Leadership tasks | | Done |
|------------------|---|------|
| 1 | Review Oregon WIC Program mission statement | |
| 2 | Role model PCS when facilitating staff meetings and interacting with staff and participants | |
| 3 | Identify key partners | |
| 4 | Review WIC outreach power point presentation on coordinator page of WIC website | |
| 5 | Review WIC information on agency webpage | |