



Oregon WIC Training Supervisor Tool Kit

**Training Supervisors Forum
WIC staff giving each other a hand!
May 4-5, 2014**



Acknowledgements

The information in this tool kit was compiled by the Training Supervisors Forum Work Group:

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Revisions and Updates

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Section 1: Resilience Resources

The essence of resilience is a positive, adaptive response in the face of significant adversity. It is a process to harness resources to sustain well-being and the capacity to resume positive functioning following adversity. It is the process of adapting well in the face of adversity, trauma, tragedy, threats, or significant sources of stress.

Strengthening the Foundations of Resilience, Working Paper 13, National Scientific Council on the Developing Child, Harvard University



“In order to succeed, people need a sense of self-efficacy, to struggle together with resilience to meet the inevitable obstacles and inequities of life.” ~ Albert Bandura

“Obstacles, of course, are developmentally necessary: they teach kids strategy, patience, critical thinking, resilience and resourcefulness.” ~ Naomi Wolf

“This has been my vocation to make music of what remains.” ~ Itzak Perlman

“The greatest glory in living lies not in never falling, but in rising every time we fall.” ~ Nelson Mandela

Robin Rose (Mindfulness trainer from 2012 Statewide Meeting)


<http://www.robinrose.com/resources.php>

Submitted by Deschutes Co.

Robin has a number of resources on her webpage that can help us be mindful and deal with stress in a positive way.

Breathing Techniques

- 4-2-6-2**
 - Inhale for 4
 - Pause for 2
 - Exhale fully for 6 – 10
 - Rest for 2
 - Repeat 4 times
- 4-4-4-4**
 - Inhale for 4
 - Pause for 4
 - Exhale fully for 4
 - Rest for 4
 - Repeat 4 times
- Soup cooler**
 - To calm & refocus after an upset or incident:
 - Take a huge, deep breath.
 - Slowly release it, pretending that you are carefully blowing on a spoonful of hot soup.
 - Repeat twice.
- 4-7-8**
 - Dr. Andrew Weil suggests:
 - Inhale through your nose to a count of 4.
 - Hold your breath for a count of 7.
 - Exhale completely through your mouth, making a whoosh sound to a count of 8.

 www.robinrose.com

Self-Care Starter Kit

University at Buffalo – The State University of New York, School of Social Work
<http://socialwork.buffalo.edu/resources/self-care-starter-kit.html>

Submitted by State Staff

This web page offers many ideas for helping people take care of themselves and manage stress. These resources could be used in a group or individually. The site says the exercises and worksheets can be used without revising them for personal and/or educational (non-commercial) purposes as long as you include the original citations and the website address so people can explore on their own. The website includes:

- Introduction to Self-Care
- Developing Your Self-Care Plan
- Self-Care Assessments, Exercises and Activities
- Additional Self-Care Resources

The screenshot shows the website's header with the University at Buffalo logo and the tagline "REACHING OTHERS". A search bar is located in the top right. Below the header is a navigation menu with categories: About, Education, Faculty & Research, Community Resources, News & Events, Continuing Education, Apply, Contact Us, and Giving. The main content area features a sidebar on the left with a "Self-Care Starter Kit" section containing links to various resources. The main content area has a heading "Our Self-Care Starter Kit" above a photograph of hands holding a small plant. To the right of the photo is a welcome message. Below the photo and message is a paragraph explaining the kit's purpose.

University at Buffalo The State University of New York | REACHING OTHERS

School of Social Work

SEARCH

INFO FOR: Alumni | Current Students | Faculty & Staff | Field Educators & Liaisons

About | Education | Faculty & Research | Community Resources | News & Events | Continuing Education | Apply | Contact Us | Giving

School of Social Work > Community Resources > Self-Care Starter Kit

Our Podcast Series: inSocialWork

Self-Care Starter Kit

- > Introduction to Self-Care
- > Developing Your Self-Care Plan
- > Self-Care Assessments, Exercises and Activities
- > Additional Self-Care Resources
- > How To Flourish in Social Work Infographic
- > Contact Us

Resource Center

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Our Self-Care Starter Kit



Welcome to the UB School of Social Work's Self Care site. The resources in these pages can be thought of as a "Self-Care Starter Kit" appropriate for both students in training and for professionals already working in the field. There are also additional resources that we trust will be helpful no matter where you are on your self-care journey.

The Self-Care Starter Kit was initially developed for UB Social Work students, but it is our hope that these resources will be useful for students and professionals alike. Although the kit does not address all that goes into developing the skills of self-care, it does begin the journey.

Mindfulness Activities

Submitted by Washington Co.

Mindful Pause

The essence of the mindful pause is reconnecting with yourself and waking up to living fully in each moment. It is simple, follow these 3 steps letting your breath be natural and relaxed. Take deep belly breaths, feeling as if you could breathe into and out of your abdomen. This focus on your body and breath helps you shift gears out of autopilot and mind wandering, and anchors you in the present moment.

3 Simple Steps

1. Take a full breath...
 - Check in with your body and breathe into any tightness, discomfort or pain
 - And release tension as you breathe out.
2. Take a 2nd breath... and inhale all the way down to your belly.
 - Check in with yourself -
 - What am I feeling right now?
 - What is on my mind?
 - Exhale slowly and completely- aware of what is happening in your experience.
3. Take a 3rd deep breath...
 - Invite yourself to come home to this moment - just as it is
 - Give up striving to change anything and let yourself rest in gentle acceptance of things as they are right now.

Mindful Breathing Exercise for Daily Practice by Melissa Soll, PhD

- Close your eyes
- Notice how your body feels, the chair, your clothes, the bend of your elbow and knees
- Shift your focus to your breath.
- Notice the air coming in and out of through your nostrils
 - The rise and fall of your chest
 - The coolness of your inhale, the warmth of your exhale
 - Silently note*:
 - “When I breathe in I know I’m breathing in”
 - “When I breathe out I know I’m breathing out”

- When you are distracted by your thoughts, notice where the thoughts take you and without judgment gently return the focus to your breath
- Spend the next few minutes focusing completely on breathing
- Gently release your focus from your breath and gently bring your focus back to your chair and the placement of your feet, arms, and head
- Picture what the room will look like when you open your eyes and when you're ready go ahead and open your eyes

*As you build your “mindfulness muscle” you can begin to just silently note “*in*” when you inhale and “*out*” when you exhale

Increasing my self-awareness/mindfulness by Melissa Soll, PhD

My first sign of stress is: _____
 (Examples: tension, tightening in my stomach, fatigue, irritability, skipping lunch, overeating, bickering with loved ones)

The most important thing I can do to begin to notice the early signs of stress is:

The most important things I can do to nurture myself when I notice the first sign of stress/anxiety/suffering?

1. _____
2. _____
3. _____

Who fills my cup when it's nearing empty?

Self-Care Plan

By Melissa Soll, PhD

What is important to you in these self-care domains?

Physical

(Exercise, diet, sleep, hydration, lifestyle, etc.?)

☞ -

☞ -

☞ -

Emotional/Mental

(Mindfulness, self-awareness, acts of self-kindness, counseling, etc.?)

☞ -

☞ -

☞ -

Creative

(What do you love to do? Cooking, parenting, painting, sculpting, writing, etc.?)

☞ -

☞ -

☞ -

Social

(Who provides you with support? Who helps you refill your cup when it is nearing empty? How do you achieve balance between giving and receiving?)

☞ -

☞ -

☞ -

Spiritual

(Can you find some solace? How do you connect with nature? How do you make sense of things outside of our control?)

☞ -

☞ -

☞ -

Resilience Building Activities

Adapted from *Resiliency in the Heat of Public Service* Work Shop by Roger and Valerie Pease of InspirationWorks, LLC

Submitted by State staff

Oxygen Mask Activity

Think about riding in an airplane and the flight attendant gives you instructions for what to do in case of an emergency. They tell you that in certain situations an oxygen mask will fall from overhead and that you should put yours on before you do anything else, including helping someone else with their own oxygen mask. The idea is that if you prepare for a stressful situation and deal with yourself first before trying to help another, you will be more likely to “survive” an emergency. This activity is to help you design your own oxygen mask in case of a “stress” emergency.

1. Who would you call first? (Preferably someone who is not a relative or someone who will advise or cause more stress.)
2. Think of ideas that help you deal with stress that don't cost anything (no shopping) and can be done easily (no trips/vacations).
3. List as many activities as you can think of in 5 minutes. Share ideas with each other.
4. Identify your top 10 ideas from your list.
5. On a 3 by 5 card, write who you would call first, then write down your list of 10 ideas.
6. Keep the card where you can review it to remind yourself of your oxygen mask actions.

My Eternal Moment Activity

Think about a time in your life when you were relaxed and happy. This could be either as an adult or when you were a child, by yourself or with others, anywhere in the world. Think about what you were doing, saying, feeling, smelling, hearing, seeing. Without trying to decide why that situation made you feel that way, just remember how it felt. This special memory becomes your eternal moment – a memory that will recall a special feeling and activate the emotional side of your brain in positive way.

1. Write a few words or sentences to remind you of your eternal moment.
2. When you are stressed, take a deep breath and remember your eternal moment.
3. Give yourself 1 to 2 minutes to “remember” the positive feelings before you deal with the issue at hand.

“Let go of my thorn” exercise

Sometimes our stress comes from things that we can't seem to let go. Like the story of the lion with the thorn in his paw who was angry and mean because he had been living with the pain of the thorn for so long, we sometimes hold on to hurts or frustrations. It is natural to be upset by the frustrating events of everyday life, but holding on to them to the point that they cause stress is a choice. Roger Pease says that when something happens to us we are a victim, but when we continue to focus on it we become a “volunteer”. Every day we make a choice to hold on to that particular pain or to let go of the problem.

1. Identify a box or container that will be your “thorn disposal unit”.
2. On a piece of paper write down the one thing that seems to be the focus of your frustration.
3. Enthusiastically wad up the paper, walk to the thorn disposal, and forcefully toss the wadded paper into the thorn disposal. The physical action of getting rid of the thorn helps you mentally remove the thorn.
4. If thoughts of the frustration come up again, picture yourself throwing away that paper again.
5. Thorns can be burned, shredded, or permanently disposed of as needed.

Inclusion, Control, or Esteem? Which is it?

There are three recognized basic human emotional needs:

Inclusion – being an important part of a group (family, team, work group);

Control – autonomy, some say over how things are going or over our environment;

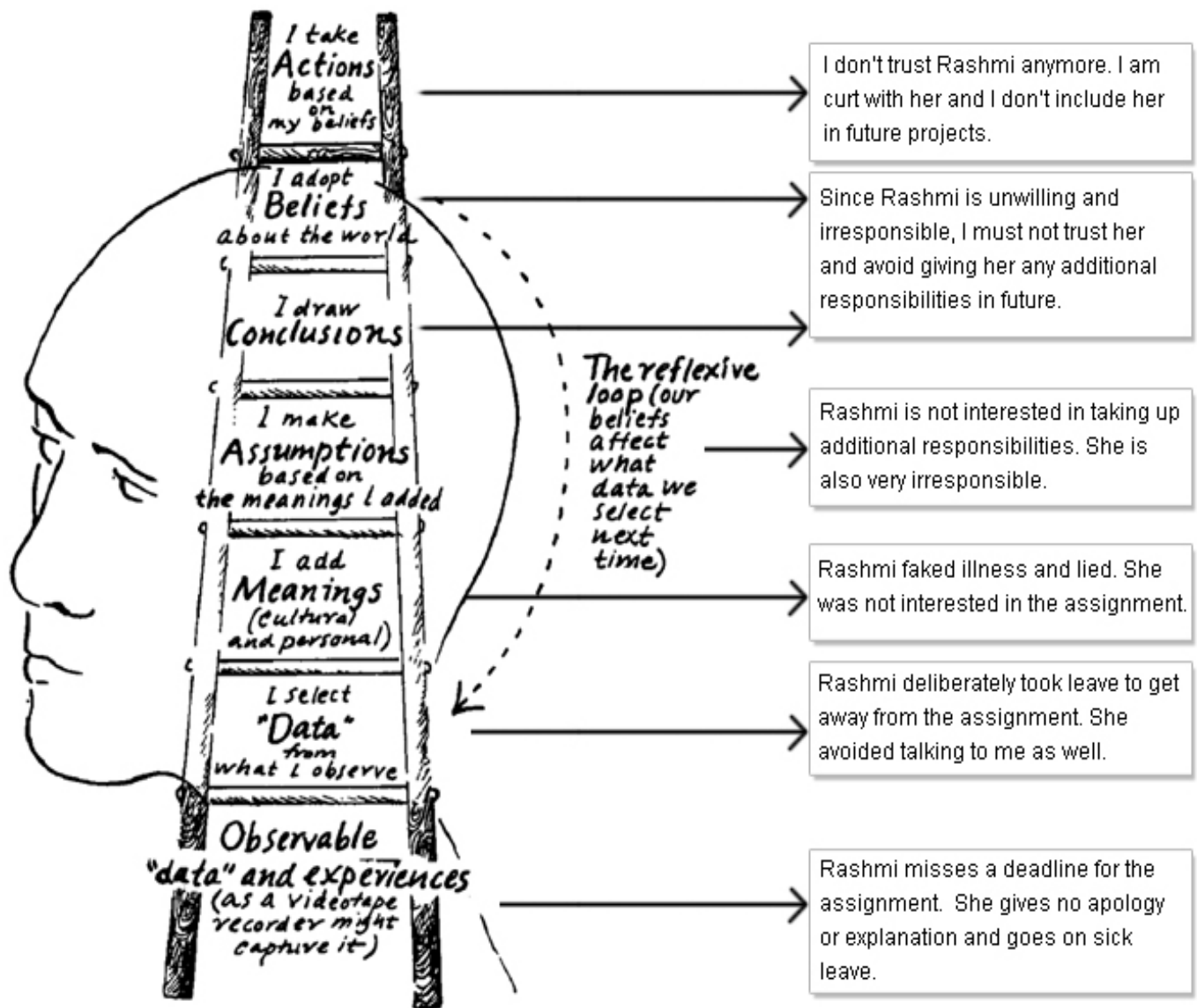
Esteem – a feeling of worth, being valued, respected, my contribution is needed.

Of these, inclusion is the most important. Inclusion is genetically part of our survival mechanism. The need for inclusion is why we are so tuned into what others in our group think, say, and do. It is so vital that we are willing to give up esteem and control in order to be a part of a group. Our supply or reservoir of inclusion, control, and esteem is what determines our ability to be resilient. In every interaction, being mindful of which of these basic needs is being affected (both for ourselves and for the other person) may give us clues to new ways to respond to the situation.

1. In a stressful situation, pause to think about how inclusion, control, and esteem may impact the situation.
2. Ask yourself what you can do to fill your reserves of inclusion, control and esteem at this point.
3. Consider what you can do to help preserve the other persons feelings of inclusion, control, and esteem.

Ladder of Inference Activity

One of our most basic survival mechanisms is to be able to quickly draw a conclusion based on a small amount of information. As primitive people, we were more likely to survive if we were able to infer meaning. For example, when we heard a noise at the mouth of our cave we inferred “that might be a mean animal waiting to eat me”, rather than going outside the cave to find out what was actually making the noise. The problem is that in modern times sometimes we infer incorrectly, especially when it comes to guessing what someone else is thinking, feeling, or planning. The graphic describes the rungs on the ladder of inference.



(Source: The Fifth Discipline By Peter Senge)

1. When dealing with a difficult situation, consider the possibility of “thinking errors” using ABCDE.
 - A. Adversity/Action: What is the actual issue or action that started this?
 - B. Belief: What am I thinking or inferring?
 - C. Consequence: How does what I am thinking make me feel and act?
 - D. Dispute: What would be one rational argument against what I am thinking? What is another possible explanation?
 - E. Evidence: What evidence is there to support either assumption?
 - F. Find: Consider using an affirmation or other active listening skill to find out more.

Section 2: Team Building

A team is a minimum of two people who have a common goal or purpose, are in communication with one another and have a plan they both work on to achieve that goal or purpose together.



"A boat doesn't go forward if each one is rowing their own way" ~ Swahili proverb

"Coming together is a beginning. Keeping together is progress. Working together is success" ~ Henry Ford

"A group becomes a team when each member is sure enough of himself and his contribution to praise the skill of the others"
~ Norman Hidle

Why team building is important in the workplace

<http://redshoespr.com/5-reasons-why-team-building-is-important/>

Submitted by State Staff

1. Facilitates better communication – Activities that create discussion enable open communication among employees, and between employees and management. This can improve workplace relationships and in turn, the quality of work done.
2. Motivates employees – Team leadership and team building go hand in hand. The more comfortable your employees are to express their ideas and opinions, the more confident they will become. This will motivate them to take on new challenges.
3. Promotes creativity – Taking a team outside of a normal clinic setting and exposing them to new experiences will force them to think outside of their normal routine. Working together with other team members can ignite creativity and fresh ideas, which are great qualities to bring back to the clinic.
4. Develops problem-solving and critical thinking skills – In WIC a crisis can happen at any time. Team building activities that require coworkers to work together to solve problems can improve the ability to think rationally and strategically. Teams that are able to determine when a problem arises and know what they can do about it, can then effectively take charge when a real crisis occurs.
5. Breaks the barrier – Team building increases the trust factor with your employees. Often in a work setting there is a disconnect between the leadership team and employees because the employees sense too large of a gap between the two. Team building exercises give leadership the opportunity to be seen as a colleague rather than a boss, which can do wonders for employee morale.

Adapted from *Above the Fold* blog, *5 Reasons Why Team Building is Important*, Deniz Cakmak, 7/3/13

Steps to Building an Effective Team

<http://ucsfhr.ucsf.edu/index.php/pubs/hrguidearticle/chapter-14-team-building/>

Submitted by State Staff

The first rule of team building is an obvious one: to lead a team effectively, you must first establish your leadership with each team member. Remember that the most effective team leaders build their relationships of trust and loyalty, rather than fear or the power of their positions.

- **Consider each employee's ideas as valuable.** Remember that there is no such thing as a stupid idea.
- **Be aware of employees' unspoken feelings.** Set an example to team members by being open with employees and sensitive to their moods and feelings.
- **Act as a harmonizing influence.** Look for chances to mediate and resolve minor disputes; point continually toward the team's higher goals.
- **Be clear when communicating.** Be careful to clarify directives.
- **Encourage trust and cooperation among employees on your team.** Remember that the relationships team members establish among themselves are every bit as important as those you establish with them. As the team begins to take shape, pay close attention to the ways in which team members work together and take steps to improve communication, cooperation, trust, and respect in those relationships.
- **Encourage team members to share information.** Emphasize the importance of each team member's contribution and demonstrate how all of their jobs operate together to move the entire team closer to its goal.
- **Delegate problem-solving tasks to the team.** Let the team work on creative solutions together.
- **Facilitate communication.** Remember that communication is the single most important factor in successful teamwork. Facilitating communication does not mean holding meetings all the time. Instead it means setting an example by remaining open to suggestions and concerns, by asking questions and offering help, and by doing everything you can to avoid confusion in your own communication.

- **Establish team values and goals; evaluate team performance.** Be sure to talk with members about the progress they are making toward established goals so that employees get a sense both of their success and of the challenges that lie ahead. Address teamwork in performance standards. Discuss with your team:
 - What do we really care about in performing our job?
 - What does the word success mean to this team?
 - What actions can we take to live up to our stated values?
- **Make sure that you have a clear idea of what you need to accomplish;** that you know what your standards for success are going to be; that you have established clear time frames; and that team members understand their responsibilities.
- **Use consensus.** Set objectives, solve problems, and plan for action. While it takes much longer to establish consensus, this method ultimately provides better decisions and greater productivity because it secures every employee's commitment to all phases of the work.
- **Set ground rules for the team.** These are the norms that you and the team establish to ensure efficiency and success. They can be simple directives (Team members are to be punctual for meetings) or general guidelines (Every team member has the right to offer ideas and suggestions), but you should make sure that the team creates these ground rules by consensus and commits to them, both as a group and as individuals.
- **Establish a method for arriving at a consensus.** You may want to conduct open debate about the pros and cons of proposals, or establish research committees to investigate issues and deliver reports.
- **Encourage listening and brainstorming.** As supervisor, your first priority in creating consensus is to stimulate debate. Remember that employees are often afraid to disagree with one another and that this fear can lead your team to make mediocre decisions. When you encourage debate you inspire creativity and that's how you'll spur your team on to better results.
- **Establish the parameters of consensus-building sessions.** Be sensitive to the frustration that can mount when the team is not achieving consensus. At the outset of your meeting, establish time limits, and work with the team to achieve consensus within those parameters. Watch out for false consensus; if an agreement is struck too quickly, be careful to probe individual team members to discover their real feelings about the proposed solution.

Symptoms that Signal a Need for Team Building

- Decreased productivity
- Conflicts or hostility among staff members
- Confusion about assignments, missed signals, and unclear relationships
- Decisions misunderstood or not carried through properly
- Apathy and lack of involvement
- Lack of initiation, imagination, innovation; routine actions taken for solving complex problems
- Complaints of discrimination or favoritism
- Ineffective staff meetings, low participation, minimally effective decisions
- Negative reactions to the manager
- Complaints about quality of service

Adapted from University of California San Francisco, *Guide to Managing Human Resources*, Chapter 14, 3/11/15

Team agreements from Deschutes County WIC

Submitted by Deschutes Co.

These three documents are reviewed, discussed and updated by Deschutes WIC staff at their annual retreats. The team agrees to the content and as a team agrees to try to abide by them.

- The Expectations of WIC Employees - The values of our organization
- The Habits of an Effective Team
- WIC Staff Interaction Agreement

The Expectations of WIC Employees

The values of our organization

All employees of the _____ WIC Program agree to adhere to the following standards of conduct:

- Do your job and do it well. Do your best. Work to your fullest potential.
- Be accountable for your actions, regardless of your circumstances.
- Value and respect WIC participants, without them you have no job.
- Treat others as you would like to be treated. Be fair, be kind, be tolerant, and be forgiving -- regardless of your circumstances.
- Show up for work. Be reliable and dependable for those you work for and work with (the work you leave behind becomes someone else's).
- Meet the deadlines required of you. When you don't meet those deadlines, you impact the work of others and you impact the effectiveness of the WIC office.

Adapted from Deschutes County WIC Program 3/10/15

The Habits of an Effective Team

1. Speak positively about your organization at every opportunity. What we feed, grows.
2. Speak positively about each other.
3. Help each other to be successful.
4. Look at ways to make ideas work, not for reasons they won't.
5. If in doubt, check it out. Don't make negative assumptions about each other.
6. Celebrate and take pride in each other's victories and support each other during times of difficulty.
7. Strive to maintain a positive mental attitude.
8. Praise publicly, resolve conflicts privately.
9. Be willing to forgive.
10. Trust that we're all doing the best we can.
11. Maintain a sense of humor and HAVE FUN!

Adapted from Deschutes County WIC Program 3/10/15

WIC Staff Interaction Agreement

Co-workers are each accountable for dealing with conflict in a discreet and timely manner.

1. Contact other person as soon as possible and when it seems appropriate. Avoid allowing conflict to build before addressing it.
2. Do it in private.
3. Avoid triangulation and involvement of third party rescuers; check your intent.
4. Approach each other from standpoint of mutual respect and kindness, regardless of differing opinions. Recognize your role in the situation.
5. Resolution is defined as a “working consensus” or “win-win”, whereby all parties can accept the decisions and outcome.
6. If conflict cannot be resolved among the people involved, a mutually agreed upon third party may be used to arbitrate or facilitate a resolution.
7. All involved parties are responsible for making certain the conflict is truly resolved.
8. Assist each other in using the WIC staff interaction agreement.

Adapted from Deschutes County WIC Program 3/10/15

30 Team-Building Games, Activities and Ideas

<http://www.onlineexpert.com/elearning/user/pdf/NatSem/ManagingDiverseWorkforce/Team-BuildingGamesActivitiesIdeas.pdf>

Team Building Activities HR ETS M7-3 download © 2008 Rockhurst University Continuing Education Center, Inc. All rights reserved.

Submitted by Washington Co.

When you Google team-building activities you can find all sorts of fun ideas. This document includes 30 team-building games, activities and ideas to use with staff to initiate conversation and to break the ice during meetings. Some exercises are a short duration of 1-5 minutes and others are up to 1 hour long. Each idea gives the time, purpose, materials, instructions, rules, and desired outcome.

Question and Answer Hands Icebreaker

Submitted by Linn Co.

Materials needed: Paper, markers or pens

Instructions: Have everyone trace their hand. When the hands are traced, have them write the questions below on each finger of the hand.

Palm- Your name and the name of the WIC program you work for

Thumb-Something you are good at

Pointer finger-Something that you are working on

Middle finger-Something that makes you mad (pet peeve) about ...

Ring finger-Something that you are passionate about

Pinky-Something that makes you happy

Have everyone write the answers to their questions on the fingers. When they have finished with their Q&A hands, give each person an opportunity to introduce themselves by sharing the information they have written on their hands.

The True Colors Personality Training by Dan Perez, a student from Rohan - San Diego State University

www-rohan.sdsu.edu/~perez61/TrueColors.pdf

Submitted by Washington Co.

This is a team building opportunity for identifying your personality type and work style by colors. Don Lowry created the metaphor, True Colors™, to translate complicated personality and learning theory into practical information we can all understand and use. He has developed an easy and entertaining way to understand ourselves and others. The training includes a personality quiz to have your staff complete to determine their dominant color. The facilitator explains the meaning of each color for staff. At the end, the group has a discussion on the benefits of this exercise in the workplace.

The objectives are:

- Identify Your Personality Style and Work Style
- Recognize your Strengths and Weaknesses
- Understand Your Color at Work
- Build Positive and Satisfying Relationships and Teams
 - Understand people better
 - Communicate more effectively

True Colors Personality Screening

“Rate” colors in each row, from 1 thru 4, with 4 being the most like you, and 1 being the least like you. Add the columns to see what color you are.

Active Opportunistic Spontaneous	Parental Traditional Responsible	Authentic Harmonious Compassionate	Flexible Creative Competent
Competitive Impulsive Persuasive	Practical Sensible Dependable	Unique Empathetic Communicative	Curious Conceptual Knowledgeable
Realistic Open-Minded Adventuresome	Loyal Conservative Organized	Devoted Warm Sensitive	Analytical Questioning Clever
Daring Outspoken Fun	Concerned Procedural Cooperative	Tender Motivating Dramatic	Determined Complex Collected
Exciting Courageous Skillful	Orderly Predictable Caring	Energetic Affectionate Sympathetic	Philosophical Principled Rational
TOTAL:			
Orange	Gold	Blue	Green

True Colors™

Section 3: Coaching and Feedback

“Coaching is assisting people with their learning.” *The Coaching Skill-Builder Activity Pack*

"A method of directing, instructing and training a person or group of people, with the aim to achieve some goal or develop specific skills. "Coaching" may mean an informal relationship between two people, of whom one has more experience and expertise than the other and offers advice and guidance as the latter learns. Some coaches use a style in which they ask questions and offer opportunities to challenge the learner to find his or her own answers. This helps the learner find answers and new ways of being based on their own values, preferences and perspectives."

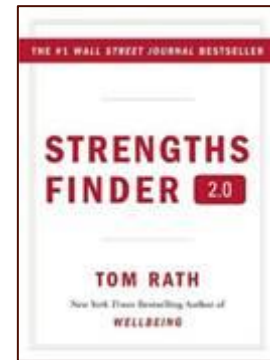
Wikipedia



“Each person holds so much power within themselves that needs to be let out. Sometimes they just need a little nudge, a little direction, a little support, a little coaching, and the greatest things can happen.” ~ Pete Carroll

Strengths Finder 2.0 (by Tom Rath)

Submitted by Salud



Here's a quick summary of how we've used the book/tool Strengths Finder 2.0 (by Tom Rath):

- Purchase a new copy of the book for every new staff person (Amazon has them for \$15.18) – each person needs their own book
- Staff take the online test (using the unique code found in the book) to get their top 5 strengths
- Strengths are reported to the site supervisor (suggestion: create a spreadsheet to help visualize where everyone falls – see example below)
- Ideally, your team consists of people with a variety of different strengths
- Supervisors use the results to:
 - Determine who might be the best person to complete specific tasks (e.g. staff in-services, collaborate on work groups, maintain inventories, order supplies, etc.)
 - Determine the best way to communicate and provide feedback and coaching to staff
 - Pair staff up for certain projects or collaborations

Salud Nutrition Services Strengths									
Relationships									
	Adaptability	Developer	Connectedness	Empathy	Harmony	Includer	Individualization	Positivity	Relator
Emp 1				2	3				
Emp 2		5							
Emp 3	1			4			5		2
Emp 4						3		4	
Emp 5					1				

Strategic Thinking								
	Analytical	Futuristic	Ideation	Input	Intellection	Learner	Strategic	Context
Emp 1								
Emp 2					4			
Emp 3								3
Emp 4								
Emp 5						2		

Influencing								
	Maximizer	Competition	Significance	Communication	Activator	Command	Self-Assurance	Woo
Emp 1								
Emp 2								
Emp 3								
Emp 4								
Emp 5								

Executing									
	Achiever	Arranger	Belief	Focus	Consistency	Deliberative	Responsibility	Restorative	Discipline
Emp 1					1		4	5	
Emp 2						3	1		2
Emp 3									
Emp 4	1		2				5		
Emp 5				3		4			5

WIC Services Tool Kit

http://www.nal.usda.gov/wicworks/Sharing_Center/gallery/staff3.html

Submitted by Washington Co.

Free CD from WIC Works. The disc includes 7 Topic Areas: Communication Skills Part I, Communication Skills Part II, Strategies for Group Education, Facilities and Use of Space, Service Delivery, Understanding your WIC Customers and a Guide for WIC Mentors. The toolkit provides: Facilitator Guides, Printable Activities, Assessment Tools and Resource Guides, 16 Training Modules, 16 Facilitator Guides, Staff Interview Videos, and Service Delivery Videos. The 16 Facilitator Guides offer timing suggestions to structure 30-minute trainings. Depending on the style of the facilitator and the size of the group, modules will take approximately 30-45 minutes to complete. Activities and discussion questions in the module are designed to be flexible and may be adjusted to accommodate group size and training space.

Video subject matter includes staff interviews as well as interactions between staff and participants. In the interest of capturing true-life WIC clinic experiences, staff had no prior preparation, training or coaching. Videos are intended to provide viewers with an opportunity to learn from others and generate discussion.

WIC Works *Sharing Gallery*

[Home](#) | [Checking Out With WIC](#) | [Food & Fun for Families](#) | [WIC: An Inside](#)

STAFF TRAINING

1 2 3

Choose from the title list or browse through the materials below.



WIC Services Toolkit

This project is the result of the collaboration between Altarum Institute and the States of Delaware, Maryland, New Jersey, and West Virginia, with funding provided by the Mid-Atlantic Region of the USDA Food and Nutrition Service. This interactive toolkit is designed as a collection of 16 training modules for 7 different topic areas. Each training module is flexible to allow for a variety of training opportunities. Each training session is 30-45 minutes in length, with additional content for longer sessions if time allows. Includes videos, activities, assessment tools, printable tools and facilitator guides. The primary focus is customer service.

Sample materials from the toolkit. To request a copy on CD, contact [WIC Works](#).

[Facilitator Guide 1.1 Customer Service Skills](#) [PDF]
[Customer Service Skills Assessment](#) [PDF]

Section 4: Training Tools

Here is a collection of check lists, reminder sheets, and job aids that have been developed by creative folks to help make training and orienting new staff a little easier.



“No one learns as much about a subject as one who is forced to teach it.”
~ Peter F. Drucker

“Practice is the hardest part of learning, and training is the essence of transformation.” ~ Ann Voskamp, *One Thousand Gifts: A Dare to Live Fully Right Where You Are*

“On the mountains of truth you can never climb in vain: either you will reach a point higher up today, or you will be training your powers so that you will be able to climb higher tomorrow.” ~ Freidrich Nietzsche

“The essence of training is to allow error without consequence.” ~ Orson Scott Card, *Ender’s Game*

Scheduling Guide - Salud

Appointment type	TWIST Codes	Certifier or Reception Column	Length of appointment	What they need to bring to the appointment
New Certification	NP, NW, NC, NI	C	30 min	Income (OHP or food stamp award letter if applicable), ID (caregiver), ID (participant), residency, Imm Card if 3-24 months of age, Child
Recertification	RW, RP, RM, RC, RI	C	30 min	Income (OHP or food stamp award letter if applicable), residency, ID for 1st or 2nd signer, ID (participant), Imm Card if 3-24 months of age, Child
Mid-Cert Health Assessment	MI, MW	C	30 min	ID for 1st or 2nd signer, ID (participant), Imm Card for Infant, Infant
Combination appt	Multiple certs, MW/MI or combo of certs/mid-certs	C	30 min for 1st client; add 15 min for each additional family member	Income (OHP or food stamp award letter if applicable), residency, ID for 1st or 2nd signer, ID (Participant), Imm Card if 3-24 months of age, Child
Second Contact	IE	R/C*	15 min per family if scheduled separately With cert appt work in cert slot	ID for 1st or 2nd signer
Class	GE	C	45	ID for 1st or 2nd signer
Registered Dietitian	FD	RD Column	HR: 15-20 min (check w/site supervisor for clinic length)	ID for 1st or 2nd signer, the participant who is high risk for the RD

Appointment type	TWIST Codes	Certifier or Reception Column	Length of appointment	What they need to bring to the appointment
Breast pump, BF Review, Wt ck f/u w/ infants certified at birth; Children transferring from out of state with one year cert period who need a mid-point health assessment	F1	R/C*	15 min (30 min for mid-point health assessment for child)	ID for 1st or 2nd signer
Out of State Transfer In, Lost and Stolen	F2	R/C*	15 min	ID (caregiver and participant ID for transfers), residency, transfer info (see below)
Temporary Newborn	F3	R/C*	15 min	Income (OHP or food stamp award letter if applicable), ID for 1st or 2nd signer, ID (baby), residency
*R/C column options: Sites over 3200 participating caseload check with Regional Supervisor for potential additional options.				
Yes Transfer Info: Check eligibility dates for certs due, schedule appt accordingly.				
No Transfer Info: Ask client for the phone number to the place where they were receiving WIC. Staff person who receives this number is responsible for obtaining the information for the transfer-in appointment. If unable to obtain transfer info from the previous WIC clinic, review options with the supervisor.				
In State Transfers are not required to be present for the transfer. If a client walks into the clinic for in state transfer, it is a clinic option to add to the schedule as a F2 appointment if vouchers or second ed are not needed.				

Preparing to See Clients (for new certifiers in training) – Salud

Appt Type	<u>Instructions</u>
Certifications	<p>Before the appointment:</p> <ol style="list-style-type: none"> 1. Photocopy proofs for ID, Residency, and Income 2. Review Certification History for hgb requirements as applicable <p>During the appointment:</p> <ol style="list-style-type: none"> 1. Update ID, residency and income. If questions arise regarding income ask your supervisor or assigned P-CPA for clarification and approval 2. Have client sign R&R (HIPAA if new client) 3. Perform certification in all areas including education 4. Schedule/request appropriate follow-up appointment. Coordinate with other family members as applicable 5. Verify with you supervisor or P-CPA the entire certification is complete 6. Place appropriate months of vouchers on print queue for reception to print 7. File signed Part. Sig. Form/HIPAA in assigned area (will vary by site supervisor)
RD (FD)	<p>Before and during the appointment:</p> <ol style="list-style-type: none"> 1. Receive a copy of the RD appt's for the particular day 2. Ask the RD what you are expected to do. (ie. Take measures, translate only, reschedule no-shows, etc.)
IE	<p>Before the appointment write down the following:</p> <ol style="list-style-type: none"> 1. The purpose of today's appointment for all clients scheduled for individual education. 2. Note how many months of vouchers the client is eligible to receive and coordinate with other family members if applicable. 3. If eligibility pending, note what documentation is needed 4. Nutrition education pamphlet as applicable (also review content of pamphlet) 5. Look in the Family Appointment Record to see if you need to schedule/reschedule any other appointments for the family <p>During the appointment:</p> <ol style="list-style-type: none"> 1. Update information for eligibility pending clients 2. Document Nutrition Education given in TWIST 3. Put correct months of vouchers on print queue
Transfer INTO The clinic (from outside OR)	<p>Before the appointment:</p> <ol style="list-style-type: none"> 1. Check for transfer paperwork. (i.e. was it faxed or sent?) If the paperwork is not available, you will need to call the other WIC clinic to get this information. 2. In TWIST, go into Client Processes-> Transfer in from OUTSIDE Oregon-> and then enter in the new information when the client is present (this may vary by site).

<u>Appt Type</u>	<u>Instructions</u>
	<p>During the appointment:</p> <ol style="list-style-type: none"> 1. Have the client read the R&R, and explain the Participant Signature Form; have client sign the form. 2. Explain to client the HIPAA and have client sign the form 3. Issue WIC card, folder, and FI's if needed 4. Explain how to use the FI's, the WIC ID card, and clinic specifics (e.g. office hours, scheduling appts) 5. Schedule next appointment if appropriate
Transfer OUT of the state	<p>During the appointment:</p> <ol style="list-style-type: none"> 1. In TWIST, go into Client Processes --> Output--> Documents--> VOC--> search for the client by WIC ID and print out the VOC document. 2. Write in the clinic information if needed and sign and date the VOC card. 3. Terminate the client in TWIST in the WIC Intake screen (using Transfer as the reason) 4. If VOC is faxed, once it goes through you do not need to save a copy – shred the print-out

Breastfeeding Review Training Sheet - Salud

Q: When is a Breastfeeding Review done?

A: A Breastfeeding Review should be completed and documented **every time** a breastfeeding mother requests any formula, or an increase in the amount of formula her infant receives from WIC. This can be done in the clinic or over the telephone.



Q: How do I record a Breastfeeding Review?

A: Include the following information in the review:

- **Infant's Progress Notes, under Plan**
 - Enter into Daily Schedule as F1 appointment

- 1) Breastfeeding issue/problem/decision as described by mother.
- 2) Intervention Provided:
 - a. Suggestions/Handouts
 - b. Services (BFP, CHS, etc.)
- 3) Result of Intervention
 - a. What was mother's final decision about increase or use of formula?

Example of note:

"BF Review: MOI *came in/called* requesting infant formula because _____. We discussed _____ to help her continue to successfully breastfeed. MOI's final decision was *to get/not to get* formula."

"Breastfeeding makes Breast Milk"!

New WIC Employee Check List - Jackson County

Training Schedule

Week 1, Day 1-3: Agency Orientation: 8 am – 5 pm ADMIN

Week 1, Day 4: 8 am: COORDINATOR= WIC walk through and introductions

- COORDINATOR
 - Fire Alarm procedure
 - Security System (copy of instructions)
 - Confidentiality (WIC Policy), record release form
 - WIC Ground Rules
 - Dress Code
 - Size and order lab coats
 - Mail boxes
 - 2 TB tests (1-3 week apart), MMR, Td, Hep B?
 - Refrigerator, Microwave, employee bathrooms
 - Telephone numbers- public and staff lines
 - Personal phone calls
 - Long distance calls
 - Telephone orientation
 - Copy machines
 - Fax machines
 - Give Log on for TWIST

Week 1, Day 5: 8 am: Meet with Supervisor/Coordinator, Employee check off.

- Training Supervisor (TS) - Review what a certifier's role is: Role of Health Dept. employee, scientifically proven Nutrition information (from evidence based research= Double Blind, Peer Reviewed studies), No testimonials, no alternative (herbal type) remedies or nutrition information
- Give: Notebook (already copied), Accuplot, Gestational Wheel
- **Help set up account online: iLearnOregon**
- **(When finished with all online modules: print out Module completion certificate and give to TS)**
- **Intro to WIC Module-** (Observe office/check-in/voucher printing at 8am or 1pm for ½ hr.) Time: 2.5 - 4.25 hours, includes **Post-Test.**
- 11:00 – Noon: **Talk with BF Coordinator about Breastfeeding** Protocol, Promotion, Peer Support Program, problems, IBCLC support from Hospitals, Lactina, PUP, and Manual pumps.
- 1:30 - 3 pm= **attend Breastfeeding Class**

Week 2, Day 1: Do Online Module: **PCS – Setting the Stage:** Time: 1.5 hours.

- **Civil Rights Training** (Power Point Presentation): 10 minutes. (Ask Debbie to show you how to get to this online)
- **Online Hematology Module** = Time: 2 hours.

Week 2, Day 2: Observe lab procedures – Hemocue info – how to clean labs

- TS observe - Practice doing hemoglobin's on secretaries, etc.
- **Online Anthropometric Module:** Time: 2 hours.
- TS- Learn what CHN's do. Meet RNs.

Week 2, Day 3: **Online Basic Nutrition Module:** Time: 4 Hours.

- **Online Prenatal Module:** Time: 2 Hours.
- Practice weighing and measuring and doing hemoglobin's.
- **10 - 11 am: Time card entry training at ADMIN**

Week 2, Day 4: **Online Postpartum Module:** Time: 2 Hours.

- **Online Breastfeeding Modules Level 1 and 2 :** Time: 3 Hours
- **Breastfeeding Module:** Time 3 Hours.

Week 3, Day 1: **Breastfeeding Module:** Time 5 Hours.

- **Online Baby Behaviors Module:** Time: 2.5 hours.

Week 3, Day 2: **Online Child Nutrition Module:** Time 2 hours

- **Infant Feeding/Formula Modules:** Time: 6 hours

Week 3, Day 3: 8-9 am PHS meeting

- **Infant Feeding/Formula Modules:** Time: 6 hours
- **Nutrition Risk Module:** Time: 1 hour

Week 3, Day 4: **Nutrition Risk Module:** Time: 8 hours.

Week 4, Day 1: **Nutrition Risk Module:** Time: 2 hours.

- **Diet Risk Module:** Time: 6 hours

Week 4, Day 2: **Diet Risk Module:** Time: 4 hours.

- **Food Package Module:** Time: 4 hours

Week 4, Day 3: **Food Package Module:** Time: 1 hours

- **Online Participant Centered Education Module:** Time: 7 hours

Week 4, Day 4: Online WIC PCS-Setting the Stage Module: Time 2 hours

- TS -Review Pregnancy Flow sheet, Bfeeding education during preg cert, N/V, wt gain, birth control referral. **Don't ask Domestic violence question if partner is in the room.**
- TS - Review Post-partum Flow Sheet: weight loss, PP diet for breastfeeding or non-bfeeding for needs and birth control referral. **Don't ask Domestic violence question if partner is in the room.**
- TS - Review how to calculate partial formula package, categories for women, difference between Fully, Mostly and Some breastfeeding women
- TS - Review Infant Flow sheet, bid formula exceptions, medical formula and Rx's; intro to solids, table foods, choking, bottle/cup/non-spill cup.
- TS - Review Child Flow sheet: Bottle/cup, picky eaters, OW/UW, amount of juice per day, T/serving meat, milk serving size, low-fat milk under 2 yrs.
- Review Notebook with TS
- TS - Review Pamphlets used for each type of certification
- TS - Review Risk Codes, TWIST errors and how to manually add or remove Risk Code.
- TS - Review Risk Code Level: Low, Medium and High
- TS - Review Class list
- TS - Review Outlying clinics
- TS - Review referrals: CHN, Healthy Start, Community referrals, etc.
- TS - Review RD (High Risk) referrals, and how to schedule an FD.
- TS - Review Graduating.
- TS - Review schedules
- TS - Talk about Ellyn Satter Books.
- TS - Review 2nd Nutrition Education policy
- TS - Review how to be return Phone calls.
- Observe how to do TWIST for recert's, etc.: Time 7 hours

Week 5, Day 1: Observe how to do TWIST for recert's, etc.: Time 7 hours

- Set up office/files, when no clients.

Week 5, Day 2-4: Start doing the TWIST input while TS or other certifiers does the recert.

- Finish setting up office/files, when no clients.

Week 6, Day 1: Do TWIST input while TS or other certifiers does RC.

- Finish setting up office, files, etc.

Week 6, Day 2: PHS meeting 8-9 am, WIC Staff Meeting 9-noon

- PM: Do TWIST input while TS or other certifiers does RC.

Week 6, Day 3-4: Start doing certifications with TS and other certifiers observing

- *Charts to be checked by TS. Put white slips in TS box. Staple family members together.*

Week 7, Day 1-2: Do certifications with other certifiers observing

Week 7, Day 3: PHS Meeting 8-9 am.

- Do certifications with other certifiers observing

Week 7, Day 4: Do certifications with other certifiers observing

Week 8: 1/2 schedule (Charts to be checked by TS)

- TS to observe a few certs

Week 9: 3/4 schedule (Charts to be check by TS)

Week 10: Start Full schedule

- Charts to be checked by TS (she will decide when to end this)
- Certification to be observed 2-3 weeks after going solo.
- Schedule Defensive driving class

Before teaching a class= Do Providing Participant Centered Groups. (Time: 9-10 hours)

- Have training supervisor observe part of 1st class taught

CPA Training Schedule - Marion Co.

Training Time Line

New Employee Orientation 2.25 days

MCHD and WIC Orientation 2.75 days

- Program Supervisor.....

 - Program introduction
 - Staff introduction
 - Tour
 - Mail box/locker
 - Desk assignment
- Training Coordinator.....

 - Calendar/Schedule
 - Communication board
 - GroupWise Messenger
 - New Employee Packet
 - Employee signature form Paper
 - Public health employee orientation Paper
 - WIC training schedule Paper
 - Module check list Paper
 - Phone list Paper
 - Clinic information Paper
 - Attendance line Paper
 - Passwords/log ins Paper
 - Civil rights e-mail
 - Code blue e-mail
 - Hazardous communication e-mail
 - Health literacy e-mail
 - Communicating through an interpreter e-mail

Modules & observations 20 days

Observe & practice w/trainer 10 days

- Classes (during month 2)

Certify clients w/trainer 10 days

Modified schedule 10 days

- Stayton
- Woodburn

Full schedule 10 days

Additional training as needed 10 days

Additional Training

_____	Team Training (not for temps)	Salem
_____	CPR, AED, and Basic First Aid	Salem
_____	TWIST CPA Training	Portland
_____	Breastfeeding Level 2	Portland

Out Clinics

Observe processes and see clients at each out clinic and with lead staff

- 1st day no schedule till 10:00, then modified schedule
- 2nd day semi modified
- 3rd day full schedule (if needed)

_____ Stayton
_____ Stayton
_____ Stayton

_____ Woodburn
_____ Woodburn
_____ Woodburn

_____ Silverton..... *(optional, staff must have clerical training before certifying here)*

_____ Early College HS..... *(optional)*

Classroom Education

Observe each class with instructors

Family

Family Meals
Dental Days

English

Spanish

Women

Eating for Two
Breastfeeding Basics
Breastfeeding Chat
Breastfeeding Support Group
Peer Counseling PN1
Peer Counseling PN2
Peer Counseling PN3
Peer Counseling PN4
Peer Counseling PN4
Peer Counseling Postpartum

English

Spanish

Infant

Feeding the First Year

English

Spanish

Children

Toddler Feeding
Kids Club

English

Spanish

At Home Education

Review classes during scheduled time

On-Line Classes

Class
Class
Class
Class

Take-Home Classes

Class
Class
Class
Class

CPA Training Schedule

2.25 days	New Employee Orientation (NEO) – County Training
	New Employee Orientation (NEO) – Health Department Training
	New Employee Orientation (NEO) – Computer Training
2.75 days	MCHD and WIC Orientation: Program introduction, Staff introduction, WIC tour, Health Department tour, Breaks and lunches, mailboxes, locker assignment, Quality circle, Communication board, Desks, New employee packet, Attendance line, Computer and program log-ins, Printers, Messenger, E-mail,
	MCHD and WIC Orientation: Calendar/Schedule, Meetings, Additional trainings, Employee signature, Public Health Employee Orientation paperwork, Phone list, Clinic information, Intercoms, Overview of the WIC program, <ul style="list-style-type: none"> • Civil Rights • Code Blue • Hazardous communication • Health literacy • Communicating through an interpreter
	MCHD and WIC Orientation:
Day 1 of 20	Module - Introduction to WIC module (paper) Module - PCS – Setting the Stage module (on-line)
Day 2 of 20	Module - Food Package module (paper) Module - Breastfeeding module Level #1 (on-line) How to shop
Day 3 of 20	Module - Anthropometric module (on-line) Lab room opening, Storage and supplies, Ht and Wt guidelines, Conversions, Observations, Perform heights and weights, Lab closing, Cleaning schedule
Day 4 of 20	Module - Hematology module (on-line) Hgb guidelines, Hemoglobin level referral sheet, Observations, Perform Hgb tests on staff volunteers, Perform Hgb tests
Day 5 of 20	TWIST medical data overview, Looking up participants, Requirements for heights, weights, and Hgb, Progress notes, Additional observations of lab room work, Perform lab room work, Laboratory tests
Day 6 of 20	Module - Basic Nutrition module (on-line) Module - Nutrition Risk module Workbook #1 (paper),
Day 7 of 20	Module - Dietary Risk module (paper) Practice database NR module, Lab work
Day 8 of 20	Module - Nutrition Risk module Workbook #2 (paper) Lab work

Day 9 of 20 -Begin observing classes (scheduled by your trainer)	Module - Participant Centered Education module (on-line, with paper posttest) Peer counseling program, Childbirth classes, 2 nd contacts options, Dental visits, TWIST family summary screen, TWIST family appointment record, overview, Clinic flow, Observe NP appointments, Review 4 on-line classes, Review 4 take-home classes
Day 10 of 20	Module - Nutrition Risk module Workbook #3 & #4 (paper) TWIST prenatal overview, Practice database NR module
Day 11 of 20	Module - Prenatal Nutrition (on-line) Participant education materials, Referrals, Begin to certify NP with trainer
Day 12 of 20	Module - Nutrition Risk module Workbook #5 (paper) Observe child (1-5 years) appointments (RC), TWIST Child 1-2 & 3-5 overview, Practice database NR module
Day 13 of 20	Module - Child Nutrition (on-line) Begin to certify RC with trainer
Day 14 of 20	Module - Baby Behavior module (on-line) Module - Infant Feeding and Nutrition module (paper) Observe infant (birth to 1 year) appointments (MI and NI), TWIST Infant overview, Practice database NR module
Day 15 of 20	Module - Infant Formula (paper) Begin to certify MI and NI with trainer
Day 16 of 20	Module - Nutrition Risk module Workbook #6 (paper) Observe postpartum appointments (RP and RM), TWIST postpartum overview, Practice database NR module
Day 17 of 20	Module - Postpartum Nutrition module (on-line) Module - Breastfeeding module Level #2 (paper)
Day 18 of 20	Lactation, Breastfeeding Support Group, Breastfeeding Services (BP staff of the day), Begin to certify RP with trainer
Day 19 of 20	Food Package changes (F2), Medical Documentation, Providence, Change of Category, Lost or Stolen, Custody Changes
Day 20 of 20	Module - Providing Participant Centered Groups module (paper) session guides, audit and/or review schedule
Day 21-Day 30 (10 days)	Observe and practice with trainer:
	Observe and practice with trainer:
	Observe and practice with trainer:
	Observe and practice with trainer:
	Observe and practice with trainer:
	Observe and practice with trainer:
	Observe and practice with trainer:
	Observe and practice with trainer:
	Observe and practice with trainer:

Day 31-Day 40 (10 days)	Certify with trainer:
	Certify with trainer:
	Certify with trainer:
	Certify with trainer:
	Certify with trainer:
	Certify with trainer:
	Certify with trainer:
	Certify with trainer:
	Certify with trainer:
	Certify with trainer:
Day 41-Day 50 (10 days) Include 1 day at each out clinic (modified schedule) -Stayton (mod) -Woodburn (mod)	Modified Schedule (half the appointments):
	Modified Schedule (half the appointments):
	Modified Schedule (half the appointments):
	Modified Schedule (half the appointments):
	Modified Schedule (half the appointments):
	Modified Schedule (half the appointments):
	Modified Schedule (half the appointments):
	Modified Schedule (half the appointments):
	Modified Schedule (half the appointments):
	Modified Schedule (half the appointments):
Day 51-Day 60 (10 days) -Stayton (full) -Woodburn (full)	Full Schedule:
	Full Schedule:
	Full Schedule:
	Full Schedule:
	Full Schedule:
	Full Schedule:
	Full Schedule:
	Full Schedule:
	Full Schedule:
	Full Schedule:
Day 81-Day 90 (10 days)	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:

Clerical Training Schedule - Marion Co.

Training Time Line

WIC Orientation	1 day
<ul style="list-style-type: none"> • WIC Program Supervisor..... • Training Coordinator..... <ul style="list-style-type: none"> ○ Calendar/Schedule ○ Communication board ○ GroupWise Messenger ○ New Employee Packet <ul style="list-style-type: none"> ▪ Employee signature form ▪ WIC training schedule ▪ Module check list ▪ Phone list ▪ Clinic information ▪ Passwords/log ins ▪ Civil rights 	<hr/> <hr/>
Modules & observations	5 days
Check in: Overview w/ trainer	1 day
Check in: Observe & practice w/trainer	4 days
Check in	10 days
Phone: Overview w/trainer	1 day
Phone: Observe & practice w/trainer	4 days
Phones	5 days
Out Clinics	3 days
Additional training as needed	5-10 days

Additional Training

_____ TWIST Clerical Training

Portland

Clinics

Observe processes and check in clients at other WIC sites with lead staff

- 3 days scheduled with lead staff

_____ Stayton

_____ Stayton

_____ Stayton

At Home Education

Review classes during scheduled time

On-Line Classes

Class

Class

Class

Class

Take-Home Classes

Class

Class

Class

Class

Clerical Training Schedule

1 day	WIC Orientation: Program introduction, Staff introduction, New employee packet, Program log-ins, messenger, Calendar, Meeting minutes, Additional trainings, Employee signature, Phone list, Clinic information, FI Printers <ul style="list-style-type: none"> • Civil Rights • Code Blue
Day 1 of 5	Module - Introduction to WIC module (paper) Observe check in
Day 2 of 5	Module - PCS – Setting the Stage module (on-line) Observe check in
Day 3 of 5	Module - Food Package module (paper) Observe check in
Day 4 of 5	Module - Breastfeeding module Level #1 (on-line) How to shop, Observe check in
Day 5 of 5	Observe certification, Review 4 on-line classes, Review 4 take-home classes
Day 6	Check in overview: TWIST family summary screen, TWIST family appointment record, Looking up participants, Search criteria, Real vs alias, Duplicates, Client demographics (including all tabs), Deceased clients, OHP numbers, Parent and or guardians, Procedures for client record (guardian, address, phone verification), Clinic flow, Recertify, reactivate, reinstate, Termination, Prescreen, Enrollment, Participant signature forms, Rights and responsibility, Proofs, Adjunct eligibility, MMIS, Special situation form, Income averaging, Voters registration, WIC ID cards, Referrals, Daily paperwork, Weekly supplies, Mail
Day 7-Day 10 (4 days)	Check in practice with trainer: Transfers with-in Oregon, Transfer in from another state, Transfer out of Oregon, Referrals, New appointments, Rescheduling appointments, Scheduling appointments
	Check in practice with trainer: Medical documentation forms, Providence, Food package changes (needs to be completed by a certifying staff), Category changes with food package changes (needs to be completed by a certifying staff), Lost or stolen FIs, Custody change
	Check in practice with trainer: Breast pumps, Take-home modules, On-line classes, Picking up vouchers, GE pick ups, Participant education materials, Peer counseling program, Childbirth classes, 2 nd contacts options, Dental visits, Lactation, Breastfeeding Support Group, Breastfeeding Services (BP staff of the day)
	Check in practice with trainer:

Day 11-Day15 (5 days)	Check in:
	Check in:
	Check in:
	Check in:
	Check in:
Day 16	Phone overview: Parent and or guardians, Procedures for client record (guardian, address, phone verification), Voters registration, Prescreen, Enrollment, Referrals, Transfers with-in Oregon, Transfer in from another state, Transfer out of Oregon, Custody change, Breast pumps, Take-home modules, On-line classes, Picking up vouchers, Lactation, Breastfeeding Support Group, Breastfeeding Services (BP staff of the day)
Day 17-Day 20 (4 days)	Phone practice with trainer:
	Phone practice with trainer:
	Phone practice with trainer:
	Phone practice with trainer:
Day 21-Day 25 (5 days)	Phones:
	Phones:
	Phones:
	Phones:
	Phones:
Day 26-Day 28 (3 days)	Stayton with lead staff:
	Stayton with lead staff:
	Stayton with lead staff:
Day 29-Day 38 (10 days)	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:

CPA/Clerical Training Schedule - Marion Co.

Training Time Line

New Employee Orientation 2.25 days

MCHD and WIC Orientation 2.75 days

- Program Supervisor.....

- Program introduction
 - Staff introduction
 - Tour
 - Mail box/locker
 - Desk assignment
- Training Coordinator.....

- Calendar/Schedule
- Communication board
- GroupWise Messenger
- New Employee Packet
 - Employee signature form Paper
 - Public health employee orientation Paper
 - WIC training schedule Paper
 - Module check list Paper
 - Phone list Paper
 - Clinic information Paper
 - Attendance line Paper
 - Passwords/log ins Paper
 - Civil rights e-mail
 - Code blue e-mail
 - Hazardous communication e-mail
 - Health literacy e-mail
 - Communicating through an interpretere-mail

Modules & observations 20 days

Observe & practice w/trainer 10 days

- Classes (during month 2)

Certify clients w/trainer 10 days

Modified schedule 10 days

- Stayton
- Woodburn

Full schedule 10 days

Check in overview (Trainer's office) 1 day

Check in, observe & practice w/trainer (desk 4) 4 days

Check in, desk 1, 2, or 3 5 days

- Silverton
- | | |
|--|---------|
| Phone overview (Trainer's office) | 1 day |
| Phone, observe & practice w/trainer (desk 4) | 4 days |
| Phones, phone 1 or 2 | 5 days |
| Additional training as needed | 10 days |

Additional Training

_____	Team Training (not for temps)	Salem
_____	CPR, AED, and Basic First Aid	Salem
_____	TWIST CPA Training	Portland
_____	TWIST Clerical Training	Portland
_____	Breastfeeding Level 2	Portland

Out Clinics

Observe processes and see clients at each out clinic and with lead staff

- 1st day no schedule till 10:00, then modified schedule
- 2nd day semi modified
- 3rd day full schedule (if needed)

_____	Stayton	
_____	Stayton	
_____	Stayton	
_____	Woodburn	
_____	Woodburn	
_____	Woodburn	
_____	Silverton..... (wait till completion of clerical training)	
_____	Silverton	
_____	Silverton	
_____	Early College HS.....(optional)	

Classroom Education

Observe each class with instructors

Family

Family Meals
Dental Days

English

Spanish

Women

Eating for Two
Breastfeeding Basics
Breastfeeding Chat
Breastfeeding Support Group
Peer Counseling PN1
Peer Counseling PN2
Peer Counseling PN3
Peer Counseling PN4
Peer Counseling PN4
Peer Counseling Postpartum

English

Spanish

Infant

Feeding the First Year

English

Spanish

Children

Toddler Feeding
Kids Club

English

Spanish

At Home Education

Review classes during scheduled time

On-Line Classes

Class
Class
Class
Class

Take-Home Classes

Class
Class
Class
Class

CPA Training Schedule

2.25 days	New Employee Orientation (NEO) – County Training
	New Employee Orientation (NEO) – Health Department Training
	New Employee Orientation (NEO) – Computer Training
2.75 days	MCHD and WIC Orientation: Program introduction, Staff introduction, WIC tour, Health Department tour, Breaks and lunches, mailboxes, locker assignment, Quality circle, Communication board, Desks, New employee packet, Attendance line, Computer and program log-ins, Printers, Messenger, E-mail,
	MCHD and WIC Orientation: Calendar/Schedule, Meetings, Additional trainings, Employee signature, Public Health Employee Orientation paperwork, Phone list, Clinic information, Intercoms, Overview of the WIC program, <ul style="list-style-type: none"> • Civil Rights • Code Blue • Hazardous communication • Health literacy • Communicating through an interpreter
	MCHD and WIC Orientation:
Day 1 of 20	Module - Introduction to WIC module (paper) Module - PCS – Setting the Stage module (on-line)
Day 2 of 20	Module - Food Package module (paper) Module - Breastfeeding module Level #1 (on-line) How to shop
Day 3 of 20	Module - Anthropometric module (on-line) Lab room opening, Storage and supplies, Ht and Wt guidelines, Conversions, Observations, Perform heights and weights, Lab closing, Cleaning schedule
Day 4 of 20	Module - Hematology module (on-line) Hgb guidelines, Hemoglobin level referral sheet, Observations, Perform Hgb tests on staff volunteers, Perform Hgb tests
Day 5 of 20	TWIST medical data overview, Looking up participants, Requirements for heights, weights, and Hgb, Progress notes, Additional observations of lab room work, Perform lab room work, Laboratory tests
Day 6 of 20	Module - Basic Nutrition module (on-line) Module - Nutrition Risk module Workbook #1 (paper),
Day 7 of 20	Module - Dietary Risk module (paper) Practice database NR module, Lab work
Day 8 of 20	Module - Nutrition Risk module Workbook #2 (paper) Lab work
Day 9 of 20 -Begin observing classes (scheduled by your trainer)	Module - Participant Centered Education module (on-line, with paper posttest) Peer counseling program, Childbirth classes, 2 nd contacts options, Dental visits, TWIST family summary screen, TWIST family appointment record, overview, Clinic flow, Observe NP appointments, Review 4 on-line classes, Review 4 take-home classes

Day 10 of 20	Module - Nutrition Risk module Workbook #3 & #4 (paper) TWIST prenatal overview, Practice database NR module
Day 11 of 20	Module - Prenatal Nutrition (on-line) Participant education materials, Referrals, Begin to certify NP with trainer
Day 12 of 20	Module - Nutrition Risk module Workbook #5 (paper) Observe child (1-5 years) appointments (RC), TWIST Child 1-2 & 3-5 overview, Practice database NR module
Day 13 of 20	Module - Child Nutrition (on-line) Begin to certify RC with trainer
Day 14 of 20	Module - Baby Behavior module (on-line) Module - Infant Feeding and Nutrition module (paper) Observe infant (birth to 1 year) appointments (MI and NI), TWIST Infant overview, Practice database NR module
Day 15 of 20	Module - Infant Formula (paper) Begin to certify MI and NI with trainer
Day 16 of 20	Module - Nutrition Risk module Workbook #6 (paper) Observe postpartum appointments (RP and RM), TWIST postpartum overview, Practice database NR module
Day 17 of 20	Module - Postpartum Nutrition module (on-line) Module - Breastfeeding module Level #2 (paper)
Day 18 of 20	Lactation, Breastfeeding Support Group, Breastfeeding Services (BP staff of the day), Begin to certify RP with trainer
Day 19 of 20	Food Package changes (F2), Medical Documentation, Providence, Change of Category, Lost or Stolen, Custody Changes
Day 20 of 20	Module - Providing Participant Centered Groups module (paper) session guides, audit and/or review schedule
Day 21-Day 30 (10 days)	Observe and practice with trainer:
	Observe and practice with trainer:
	Observe and practice with trainer:
	Observe and practice with trainer:
	Observe and practice with trainer:
	Observe and practice with trainer:
	Observe and practice with trainer:
	Observe and practice with trainer:
	Observe and practice with trainer:
Day 31-Day 40 (10 days)	Certify with trainer:
	Certify with trainer:
	Certify with trainer:
	Certify with trainer:
	Certify with trainer:
	Certify with trainer:
	Certify with trainer:
	Certify with trainer:
	Certify with trainer:

Day 41-Day 50 (10 days) Include 1 day at each out clinic (modified schedule) -Stayton (mod) -Woodburn (mod)	Modified Schedule (half the appointments):
	Modified Schedule (half the appointments):
	Modified Schedule (half the appointments):
	Modified Schedule (half the appointments):
	Modified Schedule (half the appointments):
	Modified Schedule (half the appointments):
	Modified Schedule (half the appointments):
	Modified Schedule (half the appointments):
	Modified Schedule (half the appointments):
Day 51-Day 60 (10 days) -Stayton (full) -Woodburn (full)	Full Schedule:
	Full Schedule:
	Full Schedule:
	Full Schedule:
	Full Schedule:
	Full Schedule:
	Full Schedule:
	Full Schedule:
	Full Schedule:

Clerical Training Schedule

Day 61	Check in overview: TWIST family summary screen, TWIST family appointment record, Looking up participants, Search criteria, Real vs alias, Duplicates, Client demographics (including all tabs), Deceased clients, OHP numbers, Parent and or guardians, Procedures for client record (guardian, address, phone verification), Clinic flow, Recertify, reactivate, reinstate, Termination, Prescreen, Enrollment, Participant signature forms, Rights and responsibility, Proofs, Adjunct eligibility, MMIS, Special situation form, Income averaging, Voters registration, WIC ID cards, Referrals, Daily paperwork, Weekly supplies, Mail
Day 62-Day 65 (4 days)	Check in practice with trainer: Transfers with-in Oregon, Transfer in from another state, Transfer out of Oregon, Referrals, New appointments, Rescheduling appointments, Scheduling appointments
	Check in practice with trainer: Medical documentation forms, Providence, Food package changes (needs to be completed by a certifying staff), Category changes with food package changes (needs to be completed by a certifying staff), Lost or stolen FIs, Custody change
	Check in practice with trainer: Breast pumps, Take-home modules, On-line classes, Picking up vouchers, GE pick ups, Participant education materials, Peer counseling program, Childbirth classes, 2nd contacts options, Dental visits, Lactation, Breastfeeding Support Group, Breastfeeding Services (BP staff of the day)
	Check in practice with trainer:

Day 66-Day 70 (5 days)	Check in:
	Check in:
	Check in:
	Check in:
	Check in:
Day 71 -Silverton (mod)	Phone overview: Parent and or guardians, Procedures for client record (guardian, address, phone verification), Voters registration, Prescreen, Enrollment, Referrals, Transfers with-in Oregon, Transfer in from another state, Transfer out of Oregon, Custody change, Breast pumps, Take-home modules, On-line classes, Picking up vouchers, Lactation, Breastfeeding Support Group, Breastfeeding Services (BP staff of the day)
Day 72-Day 75 (4 days)	Phone practice with trainer:
	Phone practice with trainer:
	Phone practice with trainer:
	Phone practice with trainer:
Day 76-Day 80 (5 days)	Phones:
	Phones:
	Phones:
	Phones:
	Phones:
Day 81-Day 90 (10 days) -Silverton (full)	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:
	Additional training as needed:

Policies to Review During Initial Certifier Training (with suggested timeline) - Salud

Week One

- 450: Confidentiality (450.0-450.9)
- 485: WIC ID Number and ID Card
- 452: Civil Rights – Racial/ethnic data collection and reporting
- 600: Certification Introduction and Overview - including corresponding policies as indicated on Flow Chart 600.2
- 601: Physical Presence at Certification
- 610: Required Proofs – Identity, Residency, and Income
- 620: Certification and Issuing Vouchers to Relatives, Friends and Co-Workers
- 770: Allowable Foods

Week Two

- 505: Food Instrument Issuance and Printing
- 506: Exceptions for Mailing Food Instruments
- 530: Food Instrument Register and FI Stub
- 560: Program Integrity: Replacing Food Instruments
- 595: Program Integrity: Separation of Duties
- 611: Income Eligibility – Determining Income Eligibility
- 612: Income Eligibility – Adjunct or Automatic Income Eligibility
- 613: Income Eligibility – What Counts as Income?
- 614: Income Eligibility – Current Income Guidelines
- 615: Income Eligibility – Change in Income
- 616: Unavailable Proofs
- 635: Participant Notification: Eligibility, Rights and Responsibilities
- 636: Participant Notification: Ineligibility and Termination from WIC
- 640: Documentation Requirements for Certification in TWIST (Specifically Appendix B: Additional Documentation for Special Circumstances)
- 645: Certification Periods
- 820: Nutrition Education: Participant Contacts

Week Three

- 625: Risk Assessment
- 675: Risk Criteria: Codes and Descriptions
- 720: General Information on Formula Use
- 730: Bid Formula: Use and Descriptions
- 735: Exchange and Handling of Returned Formula

Week Four

710: Breastfeeding: Definition, Promotion, and Support Standards

711: Breastfeeding: Benefits and Contraindications

713: Breastfeeding: Use of Supplemental Formula

As Time Allows

451: Change in Guardianship

480: Voter Registration

481: Immunization Screening and Referral Protocol

540: Proxy System

880: Referrals: Alcohol, Tobacco, and Other Drug Use

Staff Training Tracking Spreadsheet (Sample section) – Marion Co.

Training		Oregon WIC Requirements	PC Confidentiality Form	WIC Modules	PC Journey Together	Employee Signature Forms	Civil Rights	Marion County Requirements	Public Health Employee Orientation
Facilitator:			Carole Boliou	Self Paced	Wendy Oliver	Carole Boliou	Carole Boliou		Carole Boliou
Updated :			1/10/2015	2/28/2015	1/30/2015	1/30/2015	1/30/2015		1/30/2015
How Often:			1 time	1 time	1 time	Annually	Annually		1 time
Month to Complete:			NA	NA	NA	January	January		NA
Training Notes:			At hire	Before working with clients	Before working with clients	At hire	At hire		At hire
Emp #			MCHD WIC New Employee Packet	MCHD WIC New Employ. Packet	MCHD WIC New Employ. Packet	MCHD WIC New Employee Packet	MCHD WIC New Employee Packet		MCHD WIC New Employee Packet
WIC Staff									
Staff 1	xxx		NA	Yes	NA	1/21/15	1/21/15		Unknown
Staff 2	xxx		NA	Yes	NA	1/15/15	1/15/15		Unknown
Staff 3	xxx		NA	No	NA	1/15/15	1/15/15		Unknown
Staff 4	xxx		NA	Yes	NA	1/16/15	1/16/15		Unknown
BFPC									
PC 1	xxx		08/12/13	Yes	09/09/13	01/30/15	01/21/15		Unknown
PC2	xxx		01/10/14	No	e-mailed 01/30/15	1/23/2014 e-mailed 01/30/15	1/23/2014 e-mailed 01/30/15		Unknown