

Certification Guides

(Certification, Mid-Certification, Presumptive Eligibility)

This module applies to the following security roles:

Clerk
RN/RD



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This module requires use of the computer and the on-line KWIC Training Application.

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Objectives

At the completion of this module the new employee will be able to:

1. Select the correct certification guide for use with various clients.
2. Complete a certification, midcertification, and presumptive eligibility visit.

Introduction

A guide is a window displaying a series of links that open windows used to document certification information. Each link in the Guide has a corresponding message to indicate if the task is “Needed” or “Completed.” The date the task is completed also displays. All tasks must be completed for the certification to be completed. The client’s priority and eligibility period are determined upon completion of the last link on the Guide. The guides are designed to allow clinics to use a variety of staffing/clinic flow situations. Also, the links that display on the WIC Certification Guide are client category specific. For example, Immunizations will display for all children. A link for Immunizations will not display for women.

There are three certification Guides:

- WIC Certification Guide – Use this Guide to complete certifications. All staff will have access to the WIC Certification Guide, however some of the links on the Guide can only be used by a CPA.
- WIC Midcertification Guide – Use this Guide to complete a mid-certification for infants and breastfeeding woman. Refer to the PPM for information on this policy. Because proofs are not required at a mid-certification appointment, clerks do not have access to this guide, only CPAs.
- WIC Presumptive Eligibility Guide – You will rarely use this feature. It is only available for women who are pregnant. All staff members have access to the WIC Presumptive Eligibility Guide window.

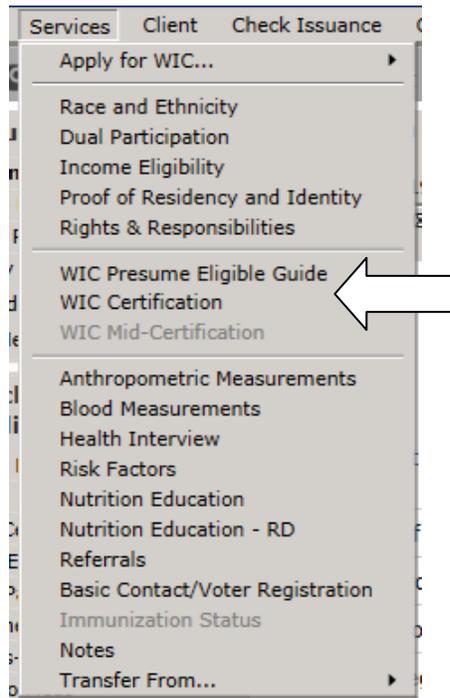
Note: The other guide in KWIC is the Transfer from Out of State guide.

This module will:

- Explain the overall function of three certification-related guides and how staff members with different security levels/responsibilities use the guides.
- Describe one way in which a client may be seen by multiple staff members, using a clinic situation where a clerk completes part of the information and a nurse or dietitian finishes the certification.
- Focus on clients with an “Applicant” status – either new clients or clients who have had a break in service and were Terminated.

The Certification Guides are accessed in two ways:

1. From the Services menu:



2. By clicking on the certification link in the Quick Links:

WIC Certification appears in the Quick Links for an applicant. If a client is active and needs to be recertified, you must access the guide through the Services menu.

WIC Mid-Certification appears in the Quick Links when the client is an infant or a breastfeeding woman.

WIC Presumptive Eligibility does not appear in the Quick Links because it is rarely used. Open this Guide by selecting it from the Services menu.



Starting a Certification



In this module, we will use the Apple **family (April and Allen)** as an example. If you did not complete Apply for WIC for them as directed in the Apply for WIC module, please do so now. April is pregnant with a due date about 4 months in the future and Allen is her 3 year-old son.

In the Getting Started training module you learned how to open and enter data in windows using the Quick Links and the links on the Notices tab. These links will be useful to you when updating a client's record during their certification period. The Needed links will serve as a reminder that a client's record was not fully completed during their certification appointment.

For clients who are new to WIC with a status of Applicant the links on the Notices tab all display as Needed, making it easy to see what information needs to be entered. However, with multiple clients in a group and for clients who are due for a recertification it is a bit confusing to use the Notices tab links. By using the WIC Certification Guide, you can easily see all the parts of the certification that are needed or completed. The guides on the WIC Certification Guide open the same windows as the Quick Links and the links on the Notices tab.

Important Note: In the KWIC training environment, all clinic staff will have access to all windows in the WIC Certification Guide and we want all staff to complete them so the example clients will become certified. In production, however, role-based security will restrict staff members to only those windows they have security to access.

There are a few steps to complete **before** a clerk would open the Certification guide.

Retrieve the Client's WIC Record

Use the **Find Client** window to find **April Apple** and retrieve her record.

Group Members	April Apple	WIC Applicant	WIC PG
April Apple	10358836 Gender Female	Client not Certified	Due Date 11/04/2013
Allen Apple	DOB 09/26/1991, 21 Years		

Demographics

Open the client's **Demographics** tab. For a new client, you will complete any blank fields. For a returning client, ask questions to be sure the information is correct.

For April, make up demographic information. (Refer back to the Apply for WIC module for information about how to complete the graphics fields.) Click [**Save**].

Client Information Initial Contact Date **07/02/2013**

Client ID **10358836** Local ID Medicaid #

Client Last Name First Name MI

Date of Birth **09/26/1991** **21 Years** Female Male

Race and Ethnicity Needed

Group Information Clinic **Butler County WIC Clinic**

Caregiver Last Name First Name MI

Alternate Last Name First Name MI

Telephone Message Telephone Telephone Notes

Street Address Mailing Address

City, State, Zip City, State, Zip

County County

Special Needs Migrant Homeless

Primary Language Interpreter Print Letters in Spanish

Release of Information to Web-IZ for all family members? Allowed Not Allowed

Race / Ethnicity Window

In the Demographics screen shot, notice the red “Race and/or Ethnicity Needed” message in the middle of the window. Although you can close out of the Demographics window tab without completing Race/Ethnicity, you should do it now. It is a federal requirement for WIC to collect ethnic and race status for each client. This does not affect the client’s eligibility for WIC.

Staff might ask “For statistical purposes, what is your/your child’s ethnicity – are you Hispanic or Latino?” “And what is your/your child’s race?”

Race and Ethnicity

Hispanic/Latino: Yes No

Select the Primary racial background

Optional Second racial background

Optional Third racial background

Optional Fourth racial background

Optional Fifth racial background

Record race/s **in order reported by the client**. Use the Primary field to record their first reported race, the next race goes in the Second field, etc. A client may list up to five races, but only one (primary) is required. The Second – Fifth field is only used if the client reports more than one race.

The drop down list has a wide variety of choices meant to list many possible answers from clients. For instance, both White and Caucasian are listed. In reports, these are combined into “White” with other choices that the State Agency determined would likely be white, such as Western Russian. If the client states an ethnic status that is not in the drop-down list, for example “Scandinavian,” then staff should work with the client to determine the best option. **If a client declines to answer the race/ethnicity question, staff are to enter information based on visual observation.**

Select a Hispanic/Latino option and a racial background for April.

At this time, if you are certifying more than one family member, you would open the next family member’s Demographics tab. Change to Allen’s Demographics tab by clicking on his name in the Group Members box in the upper left corner of the screen.



Allen’s record will open. Notice the **[Demographics]** inner tab now has Allen’s name instead of April’s. The group information will be the copy over from what you saved for April.

Complete the **[Race and/or Ethnicity Needed]** for Allen.

Infant/Child and Mother Link

Allen Apple WIC Applicant WIC C
 10358837 Gender Male Client not Certified
 DOB 05/23/2010, 3 Years 1 Months

Demographics Allen Notices April

Client Information Initial Contact Date 07/02/2013
 Client ID 10358837 Local ID Medicaid # Client Immunization Registry ID
 Client Last Name Apple First Name Allen MI
 Date of Birth 05/23/2010 3 Years 1 Months Female Male Foster Child

Race and Ethnicity Complete **No Information About Mother**

Group Information Clinic Butler County WIC Clinic

Look at Allen’s Demographics tab. Click on the red **[No Information About Mother]**. The following window will open. Because we have already entered information about April Apple, the first choice is automatically checked. In this case it is the correct choice.

Allen Apple WIC Applicant WIC C
 10358837 Gender Male Client not Certified
 DOB 05/23/2010, 3 Years 1 Months

Link Infant To Mother Allen Demographics Allen Notices April

Link Infant Allen Apple to Mother

Mother is Family Member **April Apple**
 Mother is Non-Family Member
 Mother is a WIC Participant in Another Program
 Mother is not a WIC Participant

Caregiver Last Name First Name Clear
 Client Last Name First Name
 Client ID Local ID Display Inactive Groups
 Category DOB 00/00/0000 Find

Caregiver	Client	DOB	Program	Status	Cat	Eligibility Ends	Clinic
-----------	--------	-----	---------	--------	-----	------------------	--------

These four options appear:

- **Mother is Family Member (Name)** – used to indicate the infant/child’s mother is the family member whose name is displayed. This will be the default choice when there is a woman already in the group. (The correct choice for Allen.)
- **Mother is Non-Family Member** – used to indicate the infant/child’s mother is a non-family member who is on WIC in Kansas at your clinic or another clinic. Use the search fields to find the mother’s record and associate her record with the infant record. Highlight the name of the mother in the display box and click

[Retrieve]. For instance, baby comes to your clinic with a foster mom. Foster mom knows the biological mom’s name and that she was on WIC in Kansas. We want to “join up” these records so that mom and baby records can be associated for CDC data collection.

- **Mother is a WIC Participant in Another Program** – used to indicate the infant/child’s mother is on WIC in another program outside of Kansas.
- **Mother is not a WIC Participant** – used to indicate the infant/child’s mother is not a WIC participant.

Verify all information entered is correct and save. The Identify Mother of Child/Infant window closes and you return to Demographics. Notice that the No Information About Mother link changes to show information about the infant’s mother.

Now, change back to April’s record by clicking on her name in the Group Members box in the upper left corner.

When you see her information in the Client Header, you know that you are working with April.

Reminder about Notes...

Remember that you can enter a note on the **Notes** window at any time after you have created a client’s record in KWIC. Once you save, you can not add more to that note. It is okay start a note and not save until later. If you find out any unusual information at any time, go ahead and enter a KWIC note.

Release of Information to Web-IZ

Special Assignment

- Read on-line policy 08.01.001 Interface between Kansas Immunization Registry and KWIC.

[http://www.kdheks.gov/nws-](http://www.kdheks.gov/nws-wic/Certification/CRT_08_01_01_Interface_between_KSWebIZ_and_WIC.pdf)

[wic/Certification/CRT_08_01_01_Interface_between_KSWebIZ_and_WIC.pdf](http://www.kdheks.gov/nws-wic/Certification/CRT_08_01_01_Interface_between_KSWebIZ_and_WIC.pdf)

- Talk with your supervisor about where these complete release forms are stored.

After you've read the policy in the assignment, look at the bottom of the Demographics screen where this release information is documented.



Release of Information to Web-IZ for all family members? Allowed Not Allowed

If the caregiver agrees to allow it, demographic information for infants and children (client name, gender, birth date, address and telephone number) is sent from KWIC to KSWebIZ. Read-only information about the client's immunization history and the recommendations for needed or upcoming vaccinations from KSWebIZ are visible on the Immunization window of client's KWIC record. Information about WIC participation is **NOT** available to KSWebIZ users.

The main thing to stress to clients is that with this release, anytime WIC updates their address, phone, etc, then KWIC will send that information to the Kansas Immunization Registry (KSWebIZ) so it will be correct. So it is a convenience for them.

Now we're ready to open the WIC Certification Guide!

WIC Certification Guide

From April Apple’s record, open the WIC Certification Guide in one of the two ways described in the Introduction of this module.

- Go to the Services menu and click on **WIC Certification** or
- Click the **WIC Certification** Quick Link.

The Certification Guide will open and should look like the following screen shot. Each blue underlined “task” is a link that will open the appropriate window. Each link in the Guide has a corresponding message to indicate if the task is “Needed” or “Completed.”

Group Members April Apple Allen Apple <input type="checkbox"/> Hide Inactive Clients Add New Group Member	April Apple 10358836 Gender Female DOB 09/26/1991, 21 Years		WIC Applicant Client not Certified	WIC PG Due Date 11/04/2013																																																
	<< WIC Certification Guide ⓘ April		Notices ⓘ April																																																	
WIC Certification for April Apple for category 'Pregnant'. You have started a WIC Certification for April Apple. To complete the certification, click on and complete each task 'Needed' in the list below.																																																				
<table border="0"> <tr> <td>✓</td> <td>Race and Ethnicity</td> <td>Completed</td> </tr> <tr> <td>✓</td> <td>Dual Participation Test</td> <td>Completed 07/02/2013</td> </tr> <tr> <td></td> <td>Income Eligibility</td> <td>Needed</td> </tr> <tr> <td></td> <td>Proof of Income</td> <td>Needed</td> </tr> <tr> <td></td> <td>Proof of Residency</td> <td>Needed</td> </tr> <tr> <td></td> <td>Proof of ID</td> <td>Needed</td> </tr> <tr> <td></td> <td>Anthropometric Measurement</td> <td>Needed</td> </tr> <tr> <td></td> <td>Blood Measurement</td> <td>Needed</td> </tr> <tr> <td></td> <td>Health Interview</td> <td>Needed</td> </tr> <tr> <td></td> <td>Assess Risk Factors</td> <td>Needed</td> </tr> <tr> <td></td> <td>Nutrition Education</td> <td>Needed</td> </tr> <tr> <td></td> <td>Client Goals</td> <td>Needed</td> </tr> <tr> <td></td> <td>Referrals</td> <td>Needed</td> </tr> <tr> <td></td> <td>Voter Registration</td> <td>Needed</td> </tr> <tr> <td></td> <td>Notes</td> <td>Needed</td> </tr> <tr> <td></td> <td>Complete WIC Certification</td> <td>Needed</td> </tr> </table>					✓	Race and Ethnicity	Completed	✓	Dual Participation Test	Completed 07/02/2013		Income Eligibility	Needed		Proof of Income	Needed		Proof of Residency	Needed		Proof of ID	Needed		Anthropometric Measurement	Needed		Blood Measurement	Needed		Health Interview	Needed		Assess Risk Factors	Needed		Nutrition Education	Needed		Client Goals	Needed		Referrals	Needed		Voter Registration	Needed		Notes	Needed		Complete WIC Certification	Needed
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	Voter Registration	Needed																																																		
	Notes	Needed																																																		
	Complete WIC Certification	Needed																																																		
Quick Links for April Apple Client Homepage Notes WIC Certification Race Ethnicity Dual Participation Income Eligibility Proofs-Residency&Identity Anthro Meas Blood Meas Health Interview Risk Factors Nutrition Education Referrals Change Due Date Record End of PG Survey Flowsheet Demographics Notices Reminders Rights & Responsibilities Sign for Checks																																																				

Notice that the **Racial Ethnic** link indicates **Completed** because you did this earlier.

The **Dual Participation Test** link might indicate Completed or Needed. The KWIC rule is that a dual participation “test” must be done on the day of the certification. If you did the test days ago as part of apply for WIC, you will need to do it again today. Click on the link to go to the Dual Participation Test window and read the message. (There should be no matching records in the system.) Click [**Save**]. KWIC returns you to the Certification Guide where **Dual Participation Test** will show **Completed**.

Income Eligibility

You learned about income eligibility policy in the Certification and Notification Policies module. You ought to review the information in that module and the policies it listed as you go through this section.

Determining income eligibility and documenting proofs is a very complex task. There are many parts and possible situations. It is important that you carefully read these next pages and get “coaching” help from your supervisor and co-workers. As you begin working in your clinic, sooner or later you will come upon unusual or uncommon situations. Feel free to call the State Agency with questions!

Click the **Income Eligibility** link in the Certification Guide to open the Income Eligibility Test window. First we’ll describe the window, then go back and enter information for April and Allen. Refer to the income screen here or on your computer as you read all the descriptions in the next several pages

April Apple
10358836 Gender Female
DOB 09/26/1991, 21 Years

WIC Applicant
Client not Certified

WIC PG
Due Date 11/04/2013

« **Income Eligibility** x
April

WIC Certification Guide x
April

Notices x
April

»

Test	Family Member	Program	Status	Foster Child	Medical Card	Income Eligibility
<input checked="" type="checkbox"/>	April Apple	WIC	Applicant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Allen Apple	WIC	Applicant	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Number in Family Zero Income Total Income

Food Stamps TAF FDIPIR Adjunctive Income Proof

Applicant is a member of a family in which there is a pregnant woman who is receiving or participating in Medicaid. Note

Applicant is a member of a family in which there is an infant who is receiving or participating in Medicaid.

Income Sources

Source Description

Period

Amount

Proof Self-Declared

Average					
Jan	Feb	Mar	Apr	May	Jun
<input type="text"/>					
Jul	Aug	Sep	Oct	Nov	Dec
<input type="text"/>					

The Income Eligibility window is designed so that income determination is usually group based, but can be changed if needed. Refer to this screen shot as you read the next material.

Test - The Test checkbox to the left of each client's name is checked by default to include all group members in the income assessment. The user can “uncheck” a group member to exclude them from the income assessment. For example, when assessing income for a foster child you would “uncheck” all members of the group except for the foster child to determine their income separately from their foster family.

Foster Child – KWIC will display "Yes" under Foster child to indicate that the client is a Foster Child if you have checked the Foster Child checkbox on the Demographics tab. If the checkbox on the Demographics tab is checked the Foster Child checkbox on the Income Eligibility window will appear and be automatically checked.

Medical Card – Check this box to indicate the client has an active Medical Card. **Only mark this if they also have proof with them or you’ve verified on KMAP.** The client is considered adjunctively income eligible if this is checked. Checking the Medical Card checkbox automatically marks the client’s referral to Medicaid as “Has” on the Referrals window when Referrals is opened through the WIC Certification Guide. (You will learn more about this topic later in this module.)

Number in Family - Enter the number of members in the “household economic unit”, including the unborn fetus. The Number in Family must be greater than zero and less than 21. Refer back to the Certification Policies module for information about determining the economic unit.

Zero Income - Check this box if family truly has no income. If a client reports zero income, clinic staff should ask additional questions to determine if there is any financial or other support for living expenses. If there is support provided by others, staff should consider this information for income eligibility determination.

The Income Source field does not display if the Zero Income box is checked.

Adjunctive Eligibility - Check the services received by the client. **Only mark this if they also have proof with them.** A family is considered income eligible if any one of the Adjunctive Eligibility programs is checked. Marking a check box updates the client's referral record (on the Referral window) to "Has" for the corresponding referral type.

- **Food Stamps** – In Kansas this is called “Kansas Food Assistance Program”.
- **TAF** - Temporary Assistance for Families
- **FDPIR** – Food Distribution Program on Indian Reservations

Adjunctive Eligibility Proof - Select the type of proof provided by the client for the adjunctive eligibility. Policy CRT 06.01.01 Adjunctive Eligibility describes various electronic means that staff can access proof of current participation in Medicaid.

http://www.kdheks.gov/nws-wic/Certification/CRT_06_01_01_Adjunctive_Eligibility.pdf

If the client brings in more than one proof of adjunctive eligibility (e.g. TAF Letter, Medical Card, and a Food Stamp Award Letter) select one of the proofs in the Adjunctive Eligibility Proof field and enter the other proofs in the Note field.

Additional Eligibility Questions - Ask the client the two additional eligibility questions in the center of the window. A "Yes" response to any one question makes the family Income Eligible. You must select an Adjunctive Eligibility Proof if you mark "Yes" to either question. Mark "yes" if there is proof, versus self-report. Detailed information about Adjunctive Income Eligibility is included later in this section.

Note – The Note field is available for the user to enter notes regarding income.

Income Sources - use this section to document each source of income. An income source and amount must be entered. If you have already seen a proof that make

- **Source Description** - enter the source of the income (e.g. Wal-Mart)
- **Income Amount** - enter as whole dollars.
- **Period** - select the time period for the income. If the Income Average grid is used the Income Period is automatically set to "Average."
- **Proof** - Select the proof of income provided by the client. If you choose "Other" for a proof, make a note on the Income window or Notes window with more detail. As you know from the "Certification & Notification Policies" module, if a client forgets to bring proof, you continue with what they have stated. If they are income eligible, (and eligible based on other requirements) they can receive one month of checks. The client must bring proofs and have income eligibility determined again before more checks can be issued.

Special note about income proofs.

Clients must show proofs for:

- "regular" income eligibility, e.g. pay stubs, **or**
- Adjunct income eligibility, e.g. SRS benefit letter for current month.

If you determine that they are adjunctively income eligible and have the appropriate proof, you must still ask about their income for statistical purposes. If they have proof for adjunct income eligibility and did not bring proof of income, you can simply choose "SRS benefit letter" or "Other" (and make a note.)

Add Income Source / Delete Income Source - If a client group has more than one source of income click **[Add Income Source]** for additional Income Sources sections. Click **[Delete Income Source]** to delete unused Income Sources sections.

Average - used for clients whose monthly income varies. Enter the income amount in the month for which the income applies.

The screenshot shows a section titled "Average" with a grid of 12 empty input boxes, one for each month from Jan to Dec.

If the client received no income for one or more months, use a 0 for the months in the time frame that is being accessed.

The average monthly income is calculated by summing the amounts entered for each month and then dividing by the number of months entered. For example, if Jan = 1000, Feb = 0, Mar = 1000, April = 1000, May = 300 the calculation would be $(1000+0+1000+1000+300)/5 = 660$.

Self Declared - Check the Self-Declared box if the client meets the policy requirements for Self-Declared. (Refer to PPM policy CRT 05.00.00 Residential Eligibility and Proofs.) A Self Declaration form will automatically print when this is checked.

[Calculate Income Eligibility] button – This button is disabled until you enter income information. When you click **[Calculate Income Eligibility]**. The system will calculate the client's income eligibility and display "Income Eligible" (green font) or "Over Income" (red font) in the Income Eligible column. If you try to save without clicking this button, KWIC will remind you! KWIC will also remind you if you try to calculate income eligibility without entering required information such as the number in the family.

The screenshot shows the WIC Applicant interface for April Apple. It includes a header with client information, a navigation bar with tabs for "Income Eligibility", "WIC Certification Guide", and "Notices", and a table of family members. A red arrow points to the "Calculate Income Eligibility" button.

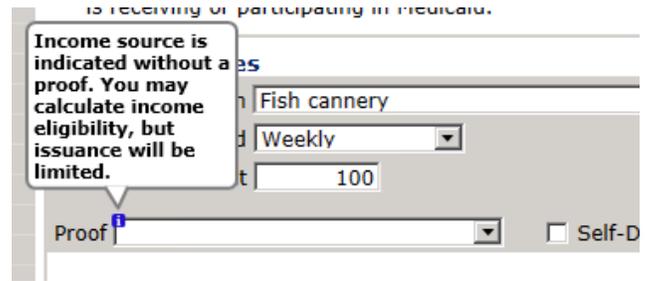
Test	Family Member	Program	Status	Foster Child	Medical Card	Income Eligibility
<input checked="" type="checkbox"/>	April Apple	WIC	Applicant		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Allen Apple	WIC	Applicant		<input type="checkbox"/>	

If the client is within an active certification period and their income eligibility assesses as over income, the system will show a message to terminate this client and all other group members that are not foster children for "over income." A Termination Letter will be automatically printed for each client. KWIC also:

- records a termination contact in Contact History and
- autogenerates a note with the same title and description used in the Terminate WIC Client window.

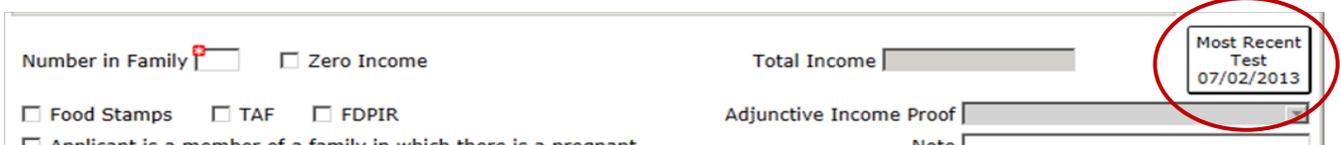
What if the client forgets proof?

If the client forgot the proof, you are allowed to proceed without it. (If you hover the cursor over the blue “I”, you will see the message that check issuance will be limited.) Calculate income eligibility. If the reported income makes the client income eligible, KWIC will only allow one month of checks to be printed without all proofs properly recorded.



Special note for a client who has previous income information...

A **Most Recent Test** link will display if income has been previously entered for the group. The date of that income test also shows. If you click on this link, the most recent income information will fill the current fields. Although this link is available, it is recommended to just start with the blank income screen so you are sure to fully assess income at each certification. Do **not** just ask “Has anything changed with your income?” If you want to look at past income records, use the Income History under Client/View History/Income.



Now that we have gone through all the parts of the Income Eligibility Test window, use the window and the previous information to **enter information for April Apple to make her income eligible.**

- Keep the **Test** box marked so the income test applies to Allen also.
- **Number in Family** should be at least three – April, her fetus, and Allen. You can pretend there are more in the family, E.g. husband, and older children.
- **Experiment with adding and deleting a source of income.**
- **Experiment with leaving out a proof, like it was forgotten. Go back and add the proof.**
- You can make April over income. You will use her in the rest of the module, so if you make her over income, just do the income test again with a lower income amount to make her eligible so you can proceed.
- When done playing around, make final entries to make April and Allen income eligible, with all proofs, save and close the income tab.



Notice that the Proof of Income link on the Certification Guide is now “Complete” (if you included all proofs). If you go back to April’s Notices window, the Proof of Income on the Notices tab shows “Complete” for both April and Allen.

Special Information about Adjunctive Income Eligibility

As you have read already, clients can prove their income eligibility by showing proof of income or proof of current enrollment in certain other programs (enrollment for themselves, or in certain situations, for other family members.) Refer to CRT 06.01.01 Adjunctive Eligibility.

You should only check one of those adjunctive income eligibility boxes if you are going to determine that they are adjunctively eligible for the program. You see the proof for that program and document the proof seen in the Adjunctive Income Proof field. When you go to the Referrals window, enter “Has” for any programs the client reports to have, even if no proof is shown.

The circles in the screen shot show the programs that can establish adjunctive income eligibility for the client. (Checking the box also eliminates the edit for the maximum income amounts.) Even if you find someone to be adjunctively eligible, you still must record at least one source of income for statistical purposes. If you are just entering the income for statistical purposes, find the choice in the Income Source Proof field related to adjunctive eligibility.

The screenshot displays the WIC Applicant record for Gloria Grape. The header includes the client's name, ID (10356539), gender (Female), and date of birth (05/16/1976, 37 Years). It also indicates the client is a WIC Applicant, not certified, with a delivery date of 05/28/2013.

The main section is titled "Income Eligibility" and contains a table with the following columns: Test, Family Member, Program, Status, Foster Child, Medical Card, and Income Eligibility. Two rows are listed: Gloria Grape (WIC Applicant) and Gary Grape (WIC Active). The "Medical Card" column for both rows has a red circle around the checkbox, which is currently unchecked.

Below the table, there are several checkboxes for adjunctive income eligibility: "Food Stamps", "TAF", "FDPIR", and two statements regarding Medicaid participation. A red circle highlights these options. To the right, there is a "Total Income" field and a "Most Recent Test" date of 01/13/2013.

The "Adjunctive Income Proof" field is highlighted with a red box and an arrow pointing to it from the right. Below this, there is a "Note" field.

The "Income Sources" section is also highlighted with a red box and an arrow pointing to it from the left. It includes fields for "Source Description", "Period", "Amount", and "Proof". There is also a "Self-Declared" checkbox.

At the bottom right, there is a grid for "Average" income by month (Jan-Dec) and buttons for "Add" and "Delete".

Examples

Here are several examples showing how you would use KWIC.

Retrieve the record of Gloria Grape and open **Income Eligibility**. She is a non-breastfeeding postpartum woman and applying for WIC. She states that she:

- has a Medical Card,
- gets Food Stamps (Kansas Food Assistance Program) and
- works part-time at Target where she earns \$200 a month.

Her infant does not live with her so there are just her and her child Gary in the household.

For each example, enter what you think should be entered on the window, then compare to the screen shot. We'll just use Gloria for the difference examples. Just close without saving for the first three examples and save after the last example.

Example 1. Gloria has her current Food Stamp benefit letter with her, but no other proofs.

What would you do?

You will find her adjunctively income-eligible based on her Food Stamp enrollment. On the Income Eligibility window, check Food Stamps (Kansas Food Assistance Program) and find the appropriate proof in the Adjunctive Income Proof field. Add the information about Target for statistical purposes. Because you are using her SRS letter for Food Stamps (Kansas Food Assistance Program) as an eligibility proof, use the adjunctive proof option instead of payroll stub in the Proof for the Income Source.

Gloria Grape WIC Applicant WIC PP
10356539 Gender Female Client not Certified Delivery Date 05/28/2013
DOB 05/16/1976, 37 Years

Income Eligibility Gloria Notices Gloria

Test	Family Member	Program	Status	Foster Child	Medical Card	Income Eligibility
<input checked="" type="checkbox"/>	Gloria Grape	WIC	Applicant		<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Gary Grape	WIC	Active		<input type="checkbox"/>	

Number in Family Zero Income

Food Stamps TAF FDPIR

Applicant is a member of a family in which there is a pregnant woman who is receiving or participating in Medicaid.

Applicant is a member of a family in which there is an infant who is receiving or participating in Medicaid.

Adjunctive Income Proof: SRS Determination Letter

Most Recent Test: 01/13/2013

Income Sources

Source Description	Target
Period: Monthly	Amount: 200
Proof: SRS Benefit Letter	<input type="checkbox"/> Self-Declared

Average: Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Add Delete

Example 2. Gloria has her current Target payroll stub with her, and no other proofs.

What do you do?

You will use her payroll stub to find her income eligible. On the Income Eligibility window, do not check Food Stamps (Kansas Food Assistance Program) or Medical Card because that information was based on self-report, not proof. In the **Income Sources** section, add the information about Target and find Payroll stub in the proof drop-down box.

The screenshot shows the 'Income Eligibility' window for Gloria. At the top, there are tabs for 'Income Eligibility' and 'Notices'. Below is a table with columns: Test, Family Member, Program, Status, Foster Child, Medical Card, and Income Eligibility. Two rows are visible: Gloria Grape (WIC, Applicant) and Gary Grape (WIC, Active). To the right of the table is a 'Calculate Income Eligibility' button. Below the table, there are input fields for 'Number in Family' (set to 2) and 'Zero Income' (unchecked). There is also a 'Total Income' field. Below these are checkboxes for 'Food Stamps', 'TAF', and 'FDPIR'. There are also two checkboxes regarding Medicaid eligibility for pregnant women and infants. To the right, there is an 'Adjunctive Income Proof' dropdown menu and a 'Note' field. Below this is the 'Income Sources' section, which includes a 'Source Description' field (set to 'Target'), a 'Period' dropdown (set to 'Monthly'), and an 'Amount' field (set to '200'). There is also a 'Proof' dropdown (set to 'Payroll Stub') and a 'Self-Declared' checkbox. To the right of the 'Income Sources' section is an 'Average' table with columns for months from Jan to Dec. There are 'Add' and 'Delete' buttons to the right of the 'Income Sources' section.

Example 3. Gloria has no income proofs with her. You have access to look up her Medical (KanCare) card in KMAP and do so. You also know to be sure it is XIX to be adjunctively eligible, not XXI. (Refer to [CRT 06.01.01 Adjunctive Eligibility](#) if needed.) But unfortunately there is no information in KMAP.

What do you do?

Use her Target income to make her eligible and do not mark Food Stamps (Kansas Food Assistance Program) or Medical Card. (Remember you are only to mark Food Stamps (Kansas Food Assistance Program) (or Medical Card) if the client has the proof for Food Stamps, (or Medical Card). Leave both the Adjunctive Income Proof and Income Source Proof blank.

If otherwise eligible, you can issue one month of checks and Gloria can bring her payroll stub, proof of Food Stamps (Kansas Food Assistance Program), **or** proof of Medical Card

later. At that time you would open the Income Eligibility window and determine her eligibility depending on which proof she brought.

Test	Family Member	Program	Status	Foster Child	Medical Card	Income Eligibility
<input checked="" type="checkbox"/>	Gloria Grape	WIC	Applicant	<input type="checkbox"/>	<input type="checkbox"/>	Income Eligible
<input checked="" type="checkbox"/>	Gary Grape	WIC	Active	<input type="checkbox"/>	<input type="checkbox"/>	Income Eligible

Number in Family Zero Income

Total Monthly Income

Most Recent Test 01/13/2013

Food Stamps TAF FDPIR

Applicant is a member of a family in which there is a pregnant woman who is receiving or participating in Medicaid.

Applicant is a member of a family in which there is an infant who is receiving or participating in Medicaid.

Adjunctive Income Proof

Note

Income Sources

Source Description Target

Period

Amount

Proof

Self-Declared

Average					
Jan	Feb	Mar	Apr	May	Jun
<input type="text"/>					
Jul	Aug	Sep	Oct	Nov	Dec
<input type="text"/>					

Add

Delete

Example 4. Gloria has all proofs with her - SRS benefit letter for Food Stamps (Kansas Food Assistance Program), current Medical Card proof, and payroll stub for Target.

What you do?

You can mark everything for which Gloria provided proof. If you need additional space, use the Notes field.

This is the last example. Calculate income eligibility, save, and close the Grape family record.

Gloria Grape WIC Applicant Client not Certified WIC PP Delivery Date 05/28/2013

10356539 Gender Female DOB 05/16/1976, 37 Years

Test	Family Member	Program	Status	Foster Child	Medical Card	Income Eligibility
<input checked="" type="checkbox"/>	Gloria Grape	WIC	Applicant	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Income Eligible
<input checked="" type="checkbox"/>	Gary Grape	WIC	Active	<input type="checkbox"/>	<input type="checkbox"/>	Income Eligible

Number in Family Zero Income

Total Monthly Income

Most Recent Test 01/13/2013

Food Stamps TAF FDPIR

Applicant is a member of a family in which there is a pregnant woman who is receiving or participating in Medicaid.

Applicant is a member of a family in which there is an infant who is receiving or participating in Medicaid.

Adjunctive Income Proof

Note

Income Sources

Source Description Target

Period

Amount

Proof

Self-Declared

Average					
Jan	Feb	Mar	Apr	May	Jun
<input type="text"/>					
Jul	Aug	Sep	Oct	Nov	Dec
<input type="text"/>					

Add

Delete

Special Information about Migrant Family Income Eligibility

An instream migrant farm worker is defined as a person and/or member of a family whose principal employment is in agriculture on a seasonal basis, who has been so employed within the last 24 months, and who has established a temporary place to live in order to be near to the area where he/she is employed. It is very possible for an instream migrant farm worker to be homeless.



To decrease possible barriers to service, Federal regulation allows for the income of an instream migrant farm worker to be determined at least once every twelve months instead of every certification period. Any determination that members of a migrant farm worker's family have met financial eligibility, (i.e., In/Out-of-State Transfer's) will satisfy the income criteria for the migrant client for any subsequent certification during the 12-month period.



Usually it is the staff member completing the demographics and/or income information who learns that a family fits the definition of "Migrant". Click the Migrant box in Demographics and Save. This activates the income rules that, after today's income test, no income test will be required for 365 days. Marking this box also automatically assigns the "Migrancy" risk factor when the nurse or dietitian opens the risk factor window.

Telephone () -	Message Telephone () -	Telephone Notes
Street Address	Mailing Address	
City, State, Zip	City, State, Zip	
County	County	
Special Needs	Migrant <input checked="" type="checkbox"/>	Homeless <input type="checkbox"/>
Primary Language	Interpreter	Print Letters in Spanish <input type="checkbox"/>
Caregiver Refuses Release of Information to Web-IZ for All Family Members <input type="checkbox"/>		

The first certification after checking the Migrant box will require an income test. So the Certification Guide will display as already presented. Each family member certified on that day will require an income test. If you add a family member during the 365 days (and still have the "Migrant" box checked in Demographics), KWIC will not require an income test for the new family member (and will autocalculate the Migrancy risk factor). The same will occur if you recertify any of the original family members. After the original 365 days, a new income test will be required. If the "Migrant" box in Demographics remains checked, a new 365 day time frame for income will be set.

If the income test is not needed for a recertification or a new family member, the Certification Guide will display “Migrant Complete” for the Income Eligibility and Proof of Income tasks.

Dual Participation Test	Needed
Income Eligibility	Migrant Complete
Proof of Income	Migrant Complete
Proof of Residency	Needed

If you open the income screen when the income test is not needed for a migrant family member, a message displays in blue. You can close (Click Cancel) without doing anything.

Test	Family Member	Program	Status	Foster Child	Medical Card	Income Eligibility
<input checked="" type="checkbox"/>	Stella Thomsen	WIC	Applicant		<input type="checkbox"/>	

This is a migrant family

Number In Family Zero Income

Food Stamps TAF FDPPIR

Applicant is a member of a family in which there is a pregnant

Total Income

Adjunctive Income Proof

Note

Calculate Income Eligibility

The *Transfers* module describes how to process a transfer from out of state who meets the Migrant definition and should not need another income determination

Proof of Residency and Identity

Continue working with April Apple's Certification Guide, click the **Proof of Residency** link to open the Proofs window.

Proof	Self Declared	Recorded	By	At	
					Add
					Delete

Proof	Self Declared	Recorded	By	At	
					Add
					Delete

Click the [Add] button for Proof of Residency to get a new data entry line. Enter a Residency proof for April.

Click the [Add] button for Proof of Identity to get a new data entry line. Enter Identity proof for April. Click [Save].

Proof	Self Declared	Recorded	By	At	
Letter/Envelope	<input type="checkbox"/>	07/02/2013 04:34 PM	01 Train	Butler County WIC Clinic	Add
					Delete

Proof	Self Declared	Recorded	By	At	
Drivers License	<input type="checkbox"/>	07/02/2013 04:34 PM	01 Train	Butler County WIC Clinic	Add
					Delete

Do not close this window yet. Instead, to be efficient, go ahead and document proofs for other family members – in this case, April's child Allen.

Click **Allen Apple** in the Group Members box to go to his Proof of Residency and Identity page.

Click the [Add] button for Proof of Residency to get a new data entry line. Enter Residency proof for Allen as you did for April.

Click the [Add] button for Proof of Identity. Enter Identity proof for Allen. Notice the choices are different. The proof must be for the individual client. You can't use a driver's license for a child!

Click the [Add] button for Proof of Caregiver Identity. Enter proof for April. Save.

Proof	Self Declared	Recorded	By	At	
Letter/Envelope	<input type="checkbox"/>	07/02/2013 04:39 PM	01 Train	Butler County WIC Clinic	Add Delete

Proof	Self Declared	Recorded	By	At	
Birth Certificate	<input type="checkbox"/>	07/02/2013 04:39 PM	01 Train	Butler County WIC Clinic	Add Delete

Proof	Self Declared	Recorded	By	At	
Drivers License	<input type="checkbox"/>	07/02/2013 04:39 PM	01 Train	Butler County WIC Clinic	Add Delete

Tip #1: Here is a tip about entering information in dropdown boxes. Once you click in the dropdown box (e.g. Proof of Identity) you can search for the desired word by using:

- your mouse, or
- arrow keys, or
- type the first letter of the item you want. For instance typing “B” in Proof of Identity brings up “Birth Certificate”.

Tip #2: Here is a tip that might save you a few seconds between screens.

“Normal” instructions are to click Save, then click Cancel. But it might be slightly faster to first click “Cancel” and then when KWIC asks if you want to save then click “Yes”. The window saves and then closes. The only screens it doesn't work on is Income and Complete WIC Certification, you have to save those screens first.

You should be back to April's WIC Certification Guide.

Notice that both the **Proof of Residency** and the **Proof of ID** links changed to **Completed**.

Your next step depends somewhat on your job description and staffing patterns at your clinic. This module uses a clinic situation where a clerk completes part of the information, a nurse completes part of the information, and the dietitian or another nurse finishes the certification. The next step usually is for the clerk to make the "four required" referrals. Although some clinics might have a different staff person (e.g., the nurse) do this later, it makes sense for the clerk to make these referrals because she/he has just asked the client about three of them.

WIC Certification for April Apple for category 'Pregnan

You have started a WIC Certification for April Apple.
To complete the certification, click on and complete each task 'Nee

✓ Race and Ethnicity	Completed
✓ Dual Participation Test	Completed 07/02/2013
✓ Income Eligibility	Completed 07/02/2013
✓ Proof of Income	Completed 07/02/2013
✓ Proof of Residency	Completed 07/02/2013
✓ Proof of ID	Completed 07/02/2013
Anthropometric Measurement	Needed
Blood Measurement	Needed
Health Interview	Needed
Assess Risk Factors	Needed
Nutrition Education	Needed
Client Goals	Needed
Referrals	Needed
Voter Registration	Needed
Notes	Needed
Complete WIC Certification	Needed

Referrals

Click the **Referrals** link to open the Referrals window for April Apple. Notice that there are two sections to this window – **“Current Referrals to Client”** at the top and **“Sources of Client’s Referral to WIC”** at the bottom.

April Apple **WIC Applicant** **WIC PG**
 10358836 Gender Female Client not Certified Due Date 11/04/2013
 DOB 09/26/1991, 21 Years

« **Referrals** | WIC Certification Guide | Notices »

Current Referrals to Client

Date	Service	Referral Status				Note
		Has	Referred	Applied	N/A	
07/02/2013	Child Support Enforcement	✓	✓	✓	✓	
07/02/2013	Food Stamps	✓	✓	✓	✓	
07/02/2013	Medicaid	✓	✓	✓	✓	
07/02/2013	TAF	✓	✓	✓	✓	

Sources of Client's Referral to WIC

Date	Service	Note

Current Referrals to Client

The following mandatory referrals are always displayed in the Current Referrals to Client section:

- Medicaid – (KanCare Title XIX)
- Child Support Enforcement

- TAF (Temporary Assistance for Families) Clients may know this as “Cash Assistance.”
- Food Stamps (Kansas Food Assistance Program)



Note: TAF, Food Stamps (Kansas Food Assistance Program), and Medicaid are also found on the Income tab. If any of these are checked on the Income tab, the corresponding referral is automatically marked as “Has” on the Referral tab.

To Document A Referral:

Select one of the following referral codes for each of the mandatory referrals:

- Has – indicates the client currently has/receives the services.
- Referred – indicates staff referred the client to the service. The client may or may not be interested in the service at this time. If you tell them about the program and they are not interested, still mark “Referred”.
- Applied – indicates the client has already applied for the service.
- Not Applicable – indicates the service is not applicable to the client. For instance, Not Applicable would be appropriate for Child Support Enforcement when a woman is married to the father of her child.

To make another referral or document that the client is enrolled in another service program, click the **[Add]** button in the Current Referrals to Client section to get a blank line and then click in the blank Service box. Select the name of the service from the Service drop-down display. Use the Scroll Bar to see more Referral choices.

Mark “Has”, “Referred”, or Applied as appropriate. Add any other lines for other services as needed. For instance, a client is already enrolled in the Maternal & Infant Program. Add a line, find that service, and mark “Has”.

Your clinic should identify to what programs the clerk will routinely make referrals, and to what programs the nurse or dietitian will routinely make referrals.

Click the Add button to get a blank line. Click in the blank Service box and select the desired name.

Click the Delete button if a blank service line is not needed.

Refer April to a Dentist.

Date	Service	Referral Status	Note
		Has . Referred . Applied . N/A	
07/02/2013	Child Support Enforcement	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Food Stamps	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Medicaid	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	TAF	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Alcohol/Drug Counseling	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Bethlehem House	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Birthline	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Blood Lead Screening	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Breastfeeding Educator (CBE)	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Breastfeeding Peer Counselor	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Breastfeeding Peer Counselor	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Breastfeeding Support - LMH	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Bright Beginnings	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Car Seat Program	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Child Care	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Child Protective Services	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Community Resource List	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	CSFP	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Dental Clinic	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Dental Clinic - Small Smiles	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Dentist	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	
07/02/2013	Domestic Violence Assistance	<input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/>	

A note about the referral may be added in the Note field.

Inactivated service choices are shown in red print. Local Staff with KWIC Administrator security status are allowed to add locally specific names of services. (Refer to KWIC Administrator module.)

Source of Client's Referral to WIC

It is **optional** to document the source of a client's referral to WIC. Clinics might want to do this if they have been having a particular outreach campaign and want to collect data to determine if the outreach to a particular source was effective.

April Apple WIC Applicant
10358836 Gender Female Client not Certified
DOB 09/26/1991, 21 Years

WIC Certification Guide April Notices April

WIC Certification for April Apple for category 'Pregnant'

You have started a WIC Certification for April Apple.
To complete the certification, click on and complete each task 'Needed'

✓ Race and Ethnicity	Completed
✓ Dual Participation Test	Completed 07/02/2013
✓ Income Eligibility	Completed 07/02/2013
✓ Proof of Income	Completed 07/02/2013
✓ Proof of Residency	Completed 07/02/2013
✓ Proof of ID	Completed 07/02/2013
Anthropometric Measurement	Needed
Blood Measurement	Needed
Health Interview	Needed
Assess Risk Factors	Needed
Nutrition Education	Needed
Client Goals	Needed
✓ Referrals	Completed
Voter Registration	Needed
Notes	Needed
Complete WIC Certification	Needed

After you have entered referrals for April Apple, the Certification Guide should look this:

Notice that the Referrals now are completed.

Even though it says "Complete", the nurse or dietitian should use the link to later add more referrals.

Voter Registration / Basic Contact

Click the **Voter Registration** link to open the Basic Contacts/Voter Registration window. The Voter Registration / Basic Contact window is used to document Basic Contact information and Voter Registration requirements.

To Document Basic Contact Requirements Completed:

Highlight each Basic Contact completed in the Contact Information mover box on the left.

- Click the **[Include]** button to move the completed contacts to the right.
- Use the **[Exclude]** button to move contacts back to the left.
- The **[Include All]** and **[Exclude All]** buttons are also available.

The screenshot displays the WIC Applicant interface for April Apple. The top section shows client details: 10358836, Gender Female, DOB 09/26/1991, 21 Years. The WIC status is 'WIC Applicant' and 'Client not Certified'. The due date for WIC PG is 11/04/2013. The main area is divided into 'Unassigned Basic Contacts' and 'Assigned Basic Contacts'. The 'Unassigned' list includes items like 'Authorized Vendors', 'Check Pickup Rules', 'Civil Rights', 'Importance of Attending Appointments', 'Importance of Participation in Nutrition Ed.', 'Lost or Stolen Checks', 'Misuse of WIC Checks/Foods', 'Next Appointment', 'Orientation to Food Package', 'Questions or Complaints', 'Rights & Responsibilities', 'Shopping with WIC Checks', 'Voter Registration', and 'WIC Program Booklet'. The 'Voter Registration' item is highlighted. To the right of this list are navigation buttons: '>', '<', '>>', and '<<'. Below this is a table titled 'Enter Voter Registration Response' with columns for 'Date' and 'Response'. A date of 07/02/2013 is entered. A dropdown menu is open, showing the following options: 'Already Registered', 'Declined to Answer', 'No, Does Not Want to Register', 'Not Eligible to Vote', and 'Yes, Wants to Register'. There are 'Add' and 'Delete' buttons to the right of the table.

Voter Registration Selections (found at the bottom of the window are as follows:

Selection Options	Description of Selection Options
Already Registered	<p>Client is registered to vote. Staff must still ask the client about Voter Registration at the time of certification and recertification. (Staff may also ask if any name or address changes have occurred since they registered last because then they'll need to register again.) Have the client sign the State of Kansas Agency Declination Form (ADF).</p> <p>If there is a name or address change and the clients does want to register, provide a Kansas Voter Registration Application instead of the ADF And mark "Yes, Wants to Register".</p>

Selection Options	Description of Selection Options
Yes, Wants to Register	Client wants to Register. Provide a Kansas Voter Registration Application.
No, Does Not Want to Register	Client does not want to Register. Have the client sign the State of Kansas Agency Declination Form (ADF). All ADF's must be filed in a separate file and retained for two (2) years.
Not Eligible to Vote	Client not eligible to vote (under 17 ½, known felon, not a citizen, etc.). Have the client sign the State of Kansas Agency Declination Form (ADF).
Declined to Answer	Client does not want a Yes or No answer documented. Staff should not offer this as a choice. Use only if the client refuses to answer after explanation by WIC staff. Staff may check "No" and write the participant's name on the ADF, along with the note "Refused to Sign."

NOTE: Clients/Caregivers must be offered the opportunity to register to vote at every certification and/or address change. Refer to policy [ADM 06.00.00 Voter Registration](#).

Complete the Basic Contact and Voter Registration for April. Save and close to return to April's WIC Certification Guide. Notice that the Voter Registration link on the guide now says "Completed".



- The Basic Contact window can be opened during the certification process from Quick Links, the Notices tab, or the Services menu.
- The Certification Guide will say "Complete" if you complete Voter Registration, even you do not move all the basic contact items.
- Information about a Basic Contact is likely provided to the client and by different staff at different times during the certification. (E.g. It does not make sense to go over "Shopping with WIC Checks" until the certification is complete and the client is determined to be eligible.) Clinics will have a local procedure, depending on staffing and clinic flow.
- Clinics may want the staff member who gives the client their checks to look at the Basic Contact window and ensure all items are marked Completed. That staff person should then educate the client about any outstanding Basic Contact items not completed.



Note: Ask your supervisor about the division of duties for the Basic Contact and Voter Registration information. Who does what sections and when during the certification process. If you are handling the Voter Registration section, where are the Voter Registration applications and to whom do you send them? Where are the Declination Forms? Where does your clinic file the completed forms?

Notes

You can write a note at any time, although the clerk does not always need to make a note. The clerk will use notes to record some unusual information, pass along information to the nurse, etc. When you click on the **Notes** link, you get a window that will be mostly blank for a new client. In the top section of the window, there is a list of all past notes. You can click on a line and open a past note to read the contents.

To get space to write a note, click **[Add]** in the Notes window. This will open an area in the bottom of the window.

- Title – Make a title that indicates the purpose of the note for future readers. For certification notes, you might simply use a title like “Cert”. Otherwise, **be more descriptive** e.g., “Formula change”, “Call about lost checks”, “Change in custody”, “High Risk”.
- Note body – Tab or click from the title to the note body and enter your text.

April Apple **WIC Applicant** **WIC PG**
 10358836 Gender Female Client not Certified Due Date 11/04/2013
 DOB 09/26/1991, 21 Years

Notes [x] WIC Certification Guide [x] Notices [x]

Date	Author	Title
07/02/2013	01 Train	

Title

Note

Created 07/02/2013 05:58 PM by 01 Train at Butler County WIC Clinic

Editing Notes

Once you save a note, it is protected from editing. KWIC allows you to leave the Notes window open while working with the client record without saving. This allows you to

update the notes as you work your way through the certification and save upon completion. However, you cannot change clients or move between family members without saving.

If you have saved your note and need to add more, make a new note for your additions or corrections. You are strongly urged to title such a note “Addition to cert note”.

Auto-generated Notes

Notes are automatically generated from certain functions in KWIC. For instance, when you terminate a client, a note is automatically generated and will appear in the list of notes. When you highlight the note in the list, you can read the note, but not make any changes. If you want to explain more about the situation, you need to add your own note.

The screenshot shows a software interface with two tabs: 'Notes' and 'Notices', both for 'Darlana M'. Below the tabs is a table of notes. The table has three columns: 'Date', 'Author', and 'Title'. The notes are listed in reverse chronological order. The most recent note, dated 07/02/2013, is highlighted in grey and has the title 'Terminated from WIC'. Below the table, there is a section for the selected note. The 'Title' field contains 'Terminated from WIC'. The 'Note' field contains the text: 'Client was terminated from WIC for the following reason: 'Over Income Guidelines' The termination is effective 07/02/2013.'

Date	Author	Title
07/02/2013	01 Train	Terminated from WIC
05/19/2013	Darcy Thompson	I/RC
05/19/2013	Darcy Thompson	Tailored Food Package
05/19/2013	Sunny Hayes	HC
02/12/2013	Cindy Jones	NE
11/20/2012	Darcy Thompson	I/MC
11/20/2012	Debra Barber	HC
07/08/2012	Cindy Jones	NE
05/27/2012	Debra Barber	HC
05/27/2012	Cindy Jones	Web IZ Consent - Yes

Title: **Terminated from WIC**

Note: Client was terminated from WIC for the following reason: 'Over Income Guidelines' The termination is effective 07/02/2013.

For instance, look at this screen shot of a series of notes. (The notes list is in reverse order – most recent on top and oldest on the bottom.) The note titled “Termination from WIC” is highlighted so you can read it in the bottom part of the window. Notice in the Termination Note that this client was terminated because of “Caregiver Request”. You can also see just from the note titles that the client was then reinstated. (This is also an auto-generated note.) Then there is a note with a title “Terminated by mistake”. Without even opening that note to see the details, you

can guess that this is a note explaining the unusual termination, then reinstatement for this client.

Now, back to April!

If you are a clerk, you might not have anything to make a note about. But if there is something in particular, go ahead and make a note. For instance a clerk might write a note like, “Cert - number in household” and add explanatory text such as “Cousin living with her currently, does not pay rent. Included cousin’s income”. Or this note might have been written on the notes field of the income tab.

If you are a RN or RD, you will record information this is not in another KWIC window, e.g. formula consumption, breastfeeding in 24 hours, food likes/dislikes, client concerns,

details about a medical condition and treatment. Do not repeat information easily found elsewhere in KWIC unless you really want to emphasize it.

Go ahead and write some kind of note for April. (If you are an RN or RD, you likely would not do this until later, in conjunction with the health assessment but for training purposes, do one now. Save and close the window to return to April's WIC Certification Guide.

At this point, most clerks will close the Certification Guide and pass off the client to the nurse or dietitian although some clerks are specially trained to complete height and weight measures. If the clerk is done with her part of the certification process, the clerk will:

- click [**Cancel**] to close the client's Certification Guide, and
- click [**Cancel**] to close the client's record.

Then the next staff member in the process will

- find the client,
- retrieve the record, and
- open the WIC Certification Guide to carry on with the certification appointment.



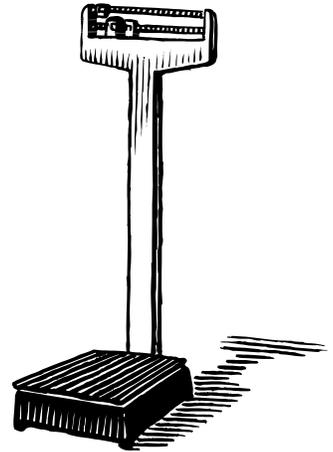
If you are working toward Clerk security clearance, please continue through this whole module. There are some parts of other windows that apply to you. It is important to understand the process, even if you will not be using some of these windows.

If you are working toward RN or RD security clearance, you need to continue it too. ☺

Anthropometric Measurements

Continue to use April Apples WIC Certification Guide.

Click the **Anthropometric Measurements** link in the WIC Certification Guide to open the Anthropometric Measurements window. This window is used to enter a variety of height and weight measurements. This information is used to automatically graph growth charts and prenatal weight gain grids, and to determine Risk Factors based on the measurements. The window contents vary some by client category. As with many windows, there is a list of past measurements.



The availability of the Length and Height fields vary by client category and age as follows:

- ❑ Length is available for Infants & Children 0 – 23 months of age. If the child is <24 months of age, measure recumbent length. If a recumbent length is measured, the child should be weighed either nude or in a dry diaper.
- ❑ Height only is available for Children \geq 24 months of age.
- ❑ Head Circumference is available for Infants and Children although is **not** a required anthropometric measurement for WIC services.

Information about the Anthropometric Measurements window

- ❑ Both length and height are entered in “inches” to the nearest eighth of an inch. Weight is entered in pounds and ounces.
- ❑ The date for new measurements defaults to today’s date, but may be changed to reflect the actual measurement date, e.g. measures from a doctor’s appointment last week. (Refer to policy [CRT 07.01.00 Determine Nutritional Risk – Anthropometric](#). Height/length and weight measures shall be measured not more than 60 days prior to certification. The client’s WIC categorical status must be the same on the date the measures were taken as on the certification date. For example, you can not use last week’s weight from the doctor’s office for a woman if she was pregnant last week and she has delivered and is being certified in WIC as Breastfeeding today.)
- ❑ The measurement date may not be in the future or prior to the client’s date of birth.
- ❑ Only one anthropometric measurement and one hematological measurement may be entered per date.

- ❑ Measurements may be entered for a previous date. If you have already entered today’s measures and want to enter past measures, go ahead. When you save, KWIC will re-order the list so they stay in chronological order.
- ❑ Measurements entered on a date other than today cannot be changed. This is known as the “Cinderella” rule; the measurements magically become permanent at the strike of midnight! (You will learn later about the **Correct Anthropometric Measurements** window.)
- ❑ Enter notes pertaining to individual measurements. For example: “Per MD” or “Difficult to measure child.”
- ❑ Obtain self-reported birth weights and lengths for all infants and children. Make a note if this information is an estimate, e.g. from foster parent.



Remember: Length and Height are entered into KWIC in **1/8 inches**.

Now, back to April!

Enter the following information for April.
(Remember to click **[Add]** to add a new line.)

- Pre-pregnancy weight – 130 lb.
- Height – 67 1/2 in.
(Enter as 4/8 inch!)
- Weight – 135 lb., 4 oz.

Click on **Display and Print Growth Charts** to view April’s prenatal weight gain grid.

April Apple WIC Applicant
 10358836 Gender Female Client not Certified
 DOB 09/26/1991, 21 Years WIC PG
Due Date 11/04/2013

Anthropometric Measures April | WIC Certification Guide April | Notices April

Pregnancy Measures
 Pre-Pregnancy Weight BMI

Measures Display and Print Growth Charts

Date	Height Inches . 8ths	Weight Pounds . Ounces	BMI	Note
07/02/2013	67 4	136	21.0	

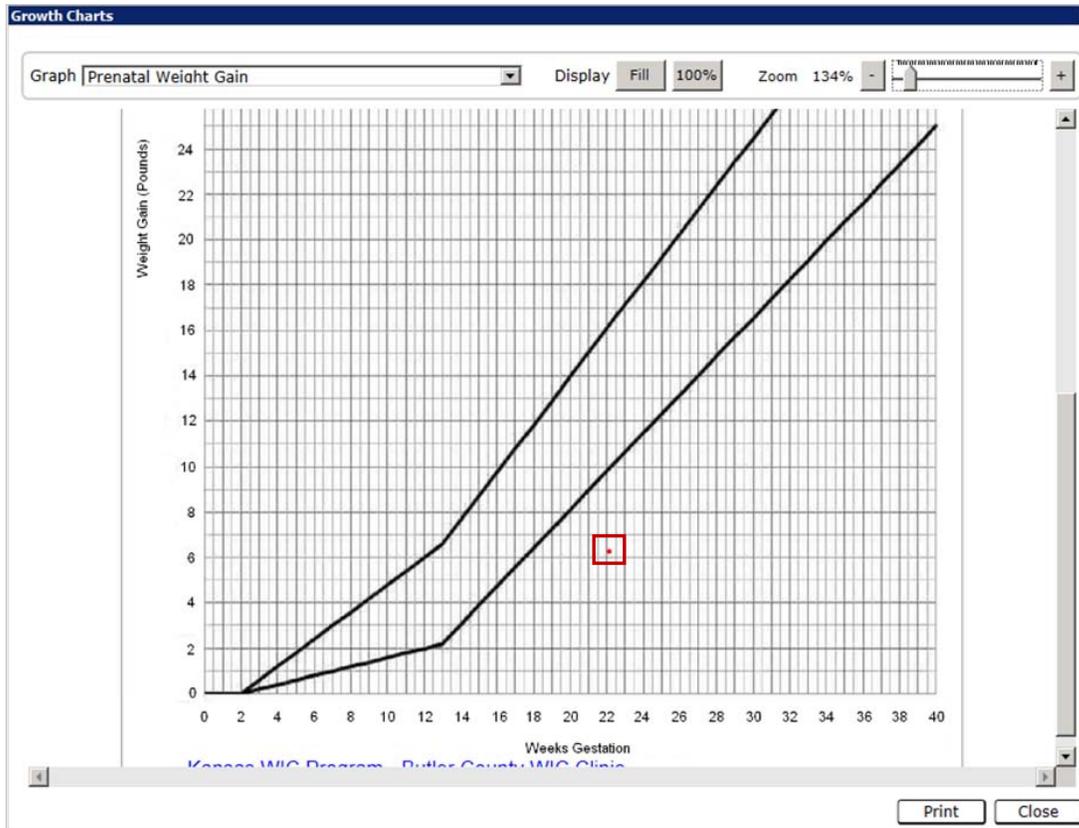
Add | Delete

Measurement Date

Height: Inches 8ths Weight: Pounds Ounces

Note

Created 07/02/2013 06:21 PM by 01 Train at Butler County WIC Clinic



Use the scroll bar on the right to move the grid image up and down. This grid and all the infant/child growth charts are merely images. You can not alter them. Click on the **[Print]** button if you want to print the graph for a chart or to send to a medical provider.

Close the grid and return to the **Anthropometric Measurements** window.

Save April's measures, but wait! Do not close April's Anthropometric Measurements window.

Usually you will measure multiple family members at the same time. Before continuing with the rest of April's certification, you'll want to enter Allen's measures too. From April's Anthropometric Measurements window, click the **Allen Apple** link in the Group Members box.

Group Members

April Apple

Allen Apple

Hide Inactive Clients

Add New Group Member

KWIC will take you to Allen's Anthropometric Measurements page.

Birth Measures

Gestational Age: Weeks

There are no birth measures recorded for this child.

Measures Display and Print Growth Charts

Date	Length Inches . 8ths	Height Inches . 8ths	Weight Pounds . Ounces	Head Cir Inches . 8ths	BMI	Note
<input type="button" value="Add"/>						
<input type="button" value="Delete"/>						

Enter the following information for Allen.

- Gestational age – 39 weeks
- Add a line. Change the date to Allen's birth date. (Use the DOB from your screen's Client Header.) Enter information that you chose.
- Add a line. Enter today's height and weight measurements as you choose.

Allen Apple WIC Applicant WIC C
 10358837 Gender Male Client not Certified
 DOB 05/23/2010, 3 Years 1 Months

Anthropometric Measures Allen WIC Certification Guide April Notices April

Birth Measures
 Gestational Age: 39 Weeks
 Length: 20 Inches 0 8ths Weight: 7 Pounds 14 Ounces Head Cir: Inches 8ths BMI 13.8

Measures [Display and Print Growth Charts](#) Add Delete

Date	Length Inches . 8ths	Height Inches . 8ths	Weight Pounds . Ounces	Head Cir Inches . 8ths	BMI	Note
07/02/2013		37	33		16.9	
05/23/2010	20 0		7 14		13.8	

Measurement Date 07/02/2013

Height: 37 Inches 8ths Weight: 33 Pounds 1 Ounces

Note

Created 07/02/2013 06:41 PM by 01 Train at Butler County WIC Clinic

Percentiles
 BMI/Age 78.40
 Weight/Length
 Length/Age
 Weight/Stature 75.71
 Height/Age 31.90

Use the **Display and Print Growth Charts** link to see your choices for growth charts. Review some of them. You will use these in assessing Allen and when explaining Allen’s status to his mother. The computer graphs to the exact date. Even though age is not shown in days, the computer is plotting with an accuracy of days. Remember – these charts are just images. The exact determination of the percentiles on the charts is done mathematically by KWIC. Risk factors are assigned off those calculations.

The graphs will show adjusted-age growth patterns for preterm infants and children, along with the growth patterns based on actual age.

Save and close Allen’s Anthropometric Measurements window. You will return and return to April’s WIC Certification Guide.

Blood Measurements

Click the **Blood Measurements** link in the WIC Certification Guide. This window is used to record hemoglobin or hematocrit values. This information is used to assign Risk Factors. As with many KWIC windows, the window includes a list of past measurements. Refer to policy **CRT 07.02.01 Determine Nutritional Risk – Hematological Test for Anemia** for details as to when a hemoglobin/hematocrit must be measured for a client.

Use either Hematocrit (enter a two digit whole number, e.g., 31), or Hemoglobin (enter a whole number to the nearest tenth, e.g., 10.9).

April Apple 10358836 Gender Female DOB 09/26/1991, 21 Years	WIC Applicant Client not Certified	WIC PG Due Date 11/04/2013
--	--	--------------------------------------

« Blood Measurements ☒	WIC Certification Guide ☒	Notices ☒	»
April	April	April	

Blood Measurements

Date	Hct	Hgb	Missing Reason	Note
07/02/2013				

Add
Delete

Date: 07/02/2013

Hematocrit Hemoglobin Reason Bloodwork is Missing

Note

Created 07/02/2013 06:46 PM by 01 Train at Butler County WIC Clinic

When you have added a new line to enter information, you can change the date to a past date, as previously explained about measures. As previously explained about measures, you can use blood values for certification that were taken up to 60 days previously, as long as the client category is still the same.

Reason Blood Work Missing

Read policy [CRT 07.02.01](#) for details about the rare situations when blood work may be omitted (assuming that policy dictates that it normally should be done at that particular certification.)

Hemoglobin Reason Bloodwork is Missing

3 06:46 PM by 01 Train at Butler County WIC Clinic

Now, back to April! Enter April’s hemoglobin as 9.8. **Save.** Then go to Allen’s **Blood Measurements** window by clicking Allen’s name in the Group Member box. Enter 12.2 for Allen’s hemoglobin value. **Save** and close his window. You will be back at April’s WIC Certification Guide.

April Apple		WIC Applicant
10358836	Gender Female	Client not Certified
DOB 09/26/1991, 21 Years		
«	WIC Certification Guide ☒ April	Notices ☒ April

WIC Certification for April Apple for category 'Pregnant'.

You have started a WIC Certification for April Apple.
To complete the certification, click on and complete each task 'Neede

✓ Race and Ethnicity	Completed
✓ Dual Participation Test	Completed 07/02/2013
✓ Income Eligibility	Completed 07/02/2013
✓ Proof of Income	Completed 07/02/2013
✓ Proof of Residency	Completed 07/02/2013
✓ Proof of ID	Completed 07/02/2013
✓ Anthropometric Measurement	Completed 07/02/2013
✓ Blood Measurement	Completed 07/02/2013
Health Interview	Needed
Assess Risk Factors	Needed
Nutrition Education	Needed
Client Goals	Needed
✓ Referrals	Completed
✓ Voter Registration	Completed
Notes	Needed
Complete WIC Certification	Needed

Health Interview

Click the **Health Interview** link in the April's WIC Certification Guide.

The Health Interview window is used to document a variety of information including some CDC Prenatal and Pediatric Nutrition Surveillance information. Information gathered on this window is important and should be completed as fully as possible.

The Health Interview window contains two navigation buttons:

Health Interview:

Currently Viewing: Health Interview

Special note about all multi-tab windows in KWIC

- The navigation button turns pale for the window you have opened.
- There is a **[Save]** and **[Cancel]** button at the bottom of each tab. It is only necessary to click **[Save]** once in the window to save information entered on any of the tabs. You can enter information on the Health Interview tab, move to the ATOD window and enter it, then save. All information entered in both windows will be saved.

Health Interview Window

The first window is named Health Interview - the same as the whole two-window group. It is designed to obtain specific information from different categories of clients. Some fields contain information “carried over” from other windows, such as Apply for WIC and Record End of Pregnancy.

Here is information about most of the fields. As you go through this information, flip back to the screen shots following the list. Some fields are self-explanatory so are not listed here. The Health Interview tab is different for different categories.

These fields are completed in the same way, no matter what the category of client.

- Supplement Use – If taking a multi-vitamin and mineral supplement with iron and folic acid, mark “Yes” button and check the boxes for both nutrients.
- Other – Record other important medications.
- Medical Provider – not required, but useful.

In women’s records...

- Education – Last year of school completed. If GED, use Grade 12.
- Series of questions about diabetes and blood pressure. Items are self-explanatory. The answers to these questions are used to auto-calculate certain risk factors.
- Current Pregnancy - If no prenatal care yet at the pregnancy certification, leave blank. If learn of change during pregnancy, can add later. Otherwise, complete at postpartum visit.
- Pregnant with Multiples (Yes, No) – This question is also on the Record New Pregnancy screen. If staff entered Yes or No then, the information will be auto-filled on the Health Interview. You should double check when completing the Health Interview. **It is important to complete this correctly because KWIC will assign a different food package to a woman pregnant with multiples.** If a woman comes back to clinic after the certification appointment and says she now knows she is having more than one baby, go to the Health Interview screen and change the answer.
- Average Number of Vitamins per Week in the Month before Pregnancy – This means any type of vitamin and/or mineral supplement. Notice that it is the **average per week.**

- Pregnancy and Delivery History
 - # of previous pregnancies
 - Count only ≥ 20 weeks gestation.
 - Multiple births count as 1
 - If Pregnant, “Previous” = previous, do not count the current pregnancy
 - If PP/BF, “Previous” = do NOT include the most recent pregnancy

- Birth Outcomes
 - Just for Breastfeeding and Postpartum women
 - Number of births from the most recent pregnancy and outcome of each.

Sample Health Interview for Pregnant Woman

Health Interview <input type="checkbox"/> April	WIC Certification Guide <input type="checkbox"/> April	Notices <input type="checkbox"/> April	
---	--	--	--

Health Interview: Health Interview ATOD

Currently Viewing: Health Interview

<p>Medication and Supplement Use</p> <p>Vitamins/Minerals Used in Past Month <input type="radio"/> Yes <input type="radio"/> No</p> <p><input type="checkbox"/> Folic Acid <input type="checkbox"/> Iron</p> <p>Other <input style="width: 100%;" type="text"/></p> <p>Notes <input style="width: 100%;" type="text"/></p>	<p>Current Pregnancy</p> <p>Estimated Due Date <input style="width: 100%;" type="text" value="11/04/2013"/></p> <p>First Prenatal Visit Date <input style="width: 100%;" type="text" value="00/00/0000"/> <input style="width: 20px;" type="button" value="15"/></p> <p>Month Prenatal Care Began <input style="width: 100%;" type="text"/></p> <p>Pregnant with Multiples? <input type="radio"/> Yes <input type="radio"/> No</p> <p>Average # of Vitamins per Week in the Month Before Pregnancy? <input style="width: 50%;" type="text"/></p>
---	---

<p>Health Information</p> <p>Education <input style="width: 100%;" type="text"/></p> <p>Medical Provider <input style="width: 100%;" type="text"/></p> <p>Do you have diabetes when you are not pregnant? <input type="radio"/> Yes <input type="radio"/> No</p> <p>Did you develop diabetes during this pregnancy? <input type="radio"/> Yes <input type="radio"/> No</p> <p>Did you develop diabetes during a previous pregnancy? <input type="radio"/> Yes <input type="radio"/> No</p> <p>Do you have high blood pressure or pre-high blood pressure ($\geq 130/80$) when you are not pregnant? <input type="radio"/> Yes <input type="radio"/> No</p> <p>Did you develop high blood pressure or pre-high blood pressure ($\geq 130/80$) during this pregnancy including pregnancy induced hypertension? <input type="radio"/> Yes <input type="radio"/> No</p> <p>Have you had preeclampsia during any previous pregnancy? <input type="radio"/> Yes <input type="radio"/> No</p>	<p>Pregnancy and Delivery History</p> <p># of Previous Pregnancies <input style="width: 50%;" type="text"/></p> <p>Last Pregnancy End Date <input style="width: 100%;" type="text" value="00/00/0000"/> <input style="width: 20px;" type="button" value="15"/></p>
---	---

Notice the additional fields in this sample Health Interview for Breastfeeding woman. This will be the same as a non-breastfeeding (Postpartum) woman.

Angelina Asparagus WIC Active BF
 10358488 Gender Female Cert. Period 01/13/2013 to 01/31/2014 Delivery Date 01/06/2013
 DOB 12/20/1981, 31 Years Priority 2

Health Interview Angelina Notices Angelina

Health Interview: Health Interview ATOD
 Currently Viewing: Health Interview

Medication and Supplement Use
 Vitamins/Minerals Yes No
 Folic Acid Iron
 Other Prenatal
 Notes

Health Information
 Education College 4 Years
 Medical Provider Dr. Cooper
 Did you develop diabetes during any previous pregnancy? Yes No
 Do you currently have diabetes? Yes No
 Do you currently have pre-diabetes? Yes No
 Did you develop high blood pressure or pre-high blood pressure ($\geq 130/80$) during your most recent pregnancy including pregnancy induced hypertension? Yes No
 Do you currently have high blood pressure or pre-high blood pressure ($\geq 130/80$)? Yes No
 Have you had preeclampsia during any

Most Recent Pregnancy and Delivery
 Estimated Due Date 01/06/2013
 Pregnancy End Date 01/06/2013
 # of Infants This Delivery 1
 Delivery Method Vaginal C-Section
 First Prenatal Visit Date 05/30/2012
 Month Prenatal Care Began
 Average # of Vitamins per Week in the Month Before Pregnancy? 0
 Pregnancy Complications NONE
 Delivery Complications NONE
 Feeding Hx Note

Pregnancy and Delivery History
 # of Previous Pregnancies 2
 Last Pregnancy End Date 06/23/2009

Birth Outcomes This Delivery
 Infant 1 Born Alive

In infant records...

- Breastfeeding – Enter and update breastfeeding information here.
 - This information is required for infants and children <24 months of age.
 - It is very important for staff to regularly update infant feeding information.
 - If the infant is breastfeeding, this information has an association to the food packages available to the infant and the mother.
 - Infants who are eating solids and still being offered breastmilk only with no use of formula should be marked as exclusively breastfeeding.
 - The **View Formula Limits** link summarizes the maximum formula amounts for each breastfeeding status. (See policy [FCI 02.01.01 Infant Food Packages-Breastfeeding Infants.](#))

Breastfeeding

Breastfeeding Status
 Date Breastfeeding Stopped
 Date Formula/Milk Introduced
 Date Solids Introduced
 Formula Type Powdered
 Formula Name Similac Advance powder
 Formula Consumed per day 12 ounces [View Formula Limits](#)

	Ounces of Formula Per Day	
	Mostly BF	Limited BF
Less Than 1 Month	1 - 3	4 +
1 to 3 Months	1 - 14	15 +
4 to 5 Months	1 - 17	18 +
6 to 12 Months	1 - 12	13 +

- Formula Type – Only for infants consuming formula.
 - Powdered
 - Ready-To-Feed
 - Concentrate

- Formula Name - The Formula Name dropdown list does **not** include:
 - Formulas not approved for issuance in Kansas.
 - Unusual formulas that are approved for issuance, but no food packages are set up in KWIC yet.

More about “Formula Name”

If the infant is taking a formula that is not approved in Kansas, select the similar Kansas-approved formula, i.e. the formula you expect to issue. Then document on the Notes screen the name of the formula the infant is actually taking.

If it is an unusual formula that is approved, but not in the list, just enter the base food package formula - Similac Advance and document the actual formula in Notes. Call the State Agency as soon as possible to get the needed formula entered into the system, so checks can be printed. Remember that you can see if a formula is approved by the Kansas WIC Program by checking Appendix 1 of the PPM, *Formula Manufacturers and Products*. If it is on this list, it is in the Health Interview dropdown.

http://www.kdheks.gov/nws-wic/PPM_Table_of_Contents.htm

- Formula Consumed per Day – ounces. KWIC uses the Formula Consumed per Day information to suggest the number of cans to be issued. This will be considered in more detail in the modules about food packages and checks.

Breastfeeding fields are mandatory at the time of certification. Which fields are required depends on the Breastfed selection.

- Household Smoking –
 - “Yes” if a household member smokes **inside** the house.
 - “No” if always smokes outside.

- Medical Provider

- Mother on WIC During Pregnancy? Uses information from the “Identify Mother of Infant” window, if available.

Sample Health Interview for Mostly Breastfeeding Infant

Anna Asparagus **WIC Active I**
10358588 Gender Female Cert. Period 01/13/2013 to 01/31/2014
DOB 01/01/2013, 6 Months Priority 2

Health Interview Notices
Anna Angelina

Health Interview: Health Interview ATOD
Currently Viewing: Health Interview

Breastfeeding

Breastfeeding Status: Mostly Breastfed
Date Breastfeeding Stopped: 00/00/0000
Date Formula/Milk Introduced: 06/13/2013
Date Solids Introduced: 00/00/0000
Formula Type: Powdered
Formula Name: Similac Advance powder
Formula Consumed per day: 12 ounces [View Formula Limits](#)

Birth

Was the Mother on WIC during this pregnancy?
On Kansas WIC

Medication and Supplement Use

Vitamins/Minerals Yes No Iron
Other: _____
Notes: _____

Household Smoking: No one else in household smoke
Medical Provider: Dr. Cooper

The Formula Name drop-down list is ordered alphabetically. Remember if you want to get to "Similac", click in the box and type "s" to get to the formulas starting with "s".

In child records...

Fields are the same as for infants with these

- Breastfeeding information is required for **children <24 months** of age.
 - If < 24 months, the Health Interview will have all same feeding fields as an Infant. Data will carry over from the Infant certification, but check for accuracy.
 - If \geq 24 months old, the Health Interview will only have the basic breastfeeding questions and date stopped.

- Formula Type, Name and Formula Consumed per Day fields are not required.
 - Complete only if a child is **currently** consuming formula.
 - If there is a reason to record historical formula information for a child, document it on the Notes screen instead of here. For example, a child was consuming Pediasure, but has recently been transitioned to foods and no formula. That would be a significant item to record in a note, but there is no reason to enter it on the Health Interview screen.

- If you unintentionally enter something in the Formula Type field, just delete the entry. Otherwise, KWIC will require that you enter Formula Name and Formula Consumed per day.
- TV/Video Viewing (Child only) – For **children \geq 2 years old**. Actual hours sitting. Sample question, “About how many hours did your child sit and watch TV, videos, or DVDs yesterday?”

Sample Health Interview for Child \geq 24 months old

Arthur Asparagus		WIC Active C
10358489 Gender Male	Cert. Period 03/10/2013 to 09/30/2013	
DOB 06/23/2009, 4 Years 0 Months	Priority 5	

Health Interview Notices

Arthur Angelina

Health Interview: Health Interview

Currently Viewing: Health Interview

<p>Breastfeeding</p> <p>Breastfeeding Status <input type="text" value="Stopped Breastfeeding"/></p> <p>Date Breastfeeding Stopped <input type="text" value="03/01/2010"/> <input type="button" value="15"/></p> <p>Formula Type <input type="text"/></p> <p>Formula Name <input type="text"/></p> <p>Formula Consumed per day <input type="text"/> ounces View Formula Limits</p>	<p>Birth</p> <p>Was the Mother on WIC during this pregnancy?</p> <p><input type="text" value="On Kansas WIC"/></p>
--	---

Medication and Supplement Use

Vitamins/Minerals Yes No Iron

Other

Notes

Household Smoking

Medical Provider

TV/Video Viewing

Now, back to April and Allen!

Complete the Health Interview for April, using information that you choose, except for the Pregnancy and Delivery History portion. Consider Allen her only previous delivery and use the date of birth you entered for Allen.

Also complete the Health Interview for Allen. (In a real clinic, you might do this later when you finish certifying Allen and not at the same time that you do mom’s Health Interview.)

ATOD (Alcohol, Tobacco, and Other Drugs) Window

The ATOD window is used to monitor the client’s alcohol, tobacco, and other drug use during and after pregnancy. It is only available for women clients. KWIC will automatically assign appropriate ATOD-related risk factors from these fields.

For Pregnant woman – This screen shot shows fields completed for April Apple. Notice that the small boxes without labels are for numbers per day of drinks or cigarettes.

Go to April’s **ATOD** tab. Click on the drop down boxes to view the possible choices. Use the scroll bar in the drop down box to scroll down and see every choice. Enter information for April as shown in this screen shot. Save and close.

Alcohol/Drug Use

of Days per Week Drinking Occurs

3 Months Prior to Pregnancy: 1

of Drinks per Day

3 Months Prior to Pregnancy: Drinks 2

Now: Did not drink

Illegal Drug Use Yes No

Cigarette Use

of Cigarettes per Day

3 Months Prior to Pregnancy: Smokes, amount known 20

Now: Smokes, amount known 5

Does Anyone Else Smoke in the Home?: Yes, someone else smokes

Smoking Changes During Pregnancy?: Decreased amount smoking

Angelina Asparagus WIC Active BF
 10358488 Gender Female Cert. Period 01/13/2013 to 01/31/2014 Delivery Date 01/06/2013
 DOB 12/20/1981, 31 Years Priority 2

Health Interview Notices
 Angelina Angelina

Health Interview: Health Interview ATOD

Currently Viewing: ATOD

Alcohol and Drug Use

of Days per Week Drinking Occurs

3 Months Prior to Pregnancy: [dropdown]

of Drinks per Day

3 Months Prior to Pregnancy: Does not Drink

Last Trimester: [dropdown]

Now: [dropdown]

Illegal Drug Use Yes No

Cigarette Use

of Cigarettes per Day

3 Months Prior to Pregnancy: Did Not Smoke

Last Trimester: Did Not Smoke

Now: Did Not Smoke

Does anyone else smoke in the home?: No one else in household smoke

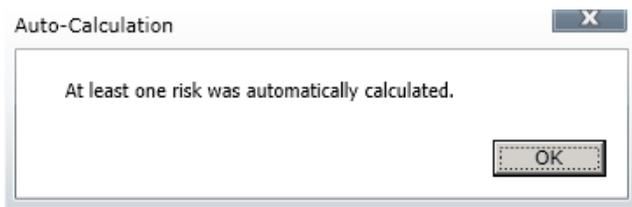
Smoking changes during pregnancy?: Not applicable, did not smoke

Note: For Breastfeeding / Postpartum women, the screen is very similar, but adds a “Last Trimester” option.

Assess Risk Factors

The **Assign Risk Factors** window is used by the CPA to assign risk factors for the client. If you are in training for RN or RD Security Status in KWIC, you will also complete the Nutrition Risk Factors modules to learn details about the risk factors and this KWIC window. Therefore, this module will just provide an overview. (As mentioned before, only CPAs will have access to this window in the clinic. In training, we want everyone to become familiar with the process, so there are no security limits.)

Click on the **Assess Risk Factors** link in April Apple's WIC Certification Guide.



If there are auto-calculated risk factors, you will see this message. If you completed the measurement and ATOD information as directed so far in this module, you should get this notification for April. Click **[OK]**.

The window has a mover box with available risk factors on the left. Risk factors listed in dark pink are high risk.

To assign a risk factor for a client:

- Highlight the desired risk factor on the left and click **[Include]**, or
- Double click the desired risk factor on the left.

To “unassign” a risk factor:

- **Highlight the risk factor in the list on the right and click [Exclude], or**
- Double click the risk factor on the right.

Call the KWIC Help Desk if you think that KWIC has made an error in auto-calculating risk factors. **Do not assign risk factors that are supposed to be auto-calculated, but KWIC did not assign. Do not “unassign” auto-calculated risk factors unless so instructed.**

The previous screen shot is a sample of April’s risk factor window. The first three assigned risk factors were auto-calculated by KWIC. On the ATOD window you entered that there was someone that smoked inside the home. We’re pretending that April reports her husband smokes in the house. As you will learn in the Nutrition Risk Factors module, that is a risk factor for pregnant women. When you highlight an assigned risk factor, a section will open below, with additional fields. In this example, an explanatory note was written to describe why the risk factor was assigned. Such notes may also be documented on the “regular” Notes window instead of here.

The detail section also contains a check box where you can indicate that the risk factor was a condition diagnosed by a medical care provider. (See policies described in the Nutrition Risk Factor module for details.)

- Assign “Tobacco Exposure in Home” risk factor.
- Make a risk note. Save.
- Notice that the detail section closes, but that an icon appears in the Note column. This icon notifies you and others that there are details written in the note. Remember – you can read the risk note, by simply clicking on the risk factor.

Highlight the “Low Hemoglobin /Hematocrit 2nd Trimester” risk factor for April.

Notice the **Auto-Calc** field contains information about the source of data for this auto-calculated risk factor. If you want to know the value, you can click here instead of going back to the Blood Measurements window.

If you want, add other risk factors to April’s record (but leave these four). Save and close.

Professional Discretion High Risk (PDHR)

The bottom part of the Assign Risk Factors window provides an opportunity for the CPA to identify if a low-risk client should be considered high-risk for some reason – Professional Discretion High Risk (PDHR). **Do not assign PDHR if the client already has a high risk factor.** There should be documentation (e.g. in Notes) explaining the situation.

Refer to policy [NED 02.03.00 Secondary Nutrition Education Contact – High Risk](#). Any client assigned PDHR must be seen by a dietitian for a high risk visit for the secondary nutrition education contact, just like the “regular” High Risk clients. PDHR is not used

often, but CPAs are given the authority to make such a determination. Examples of when PDHR might be assigned:

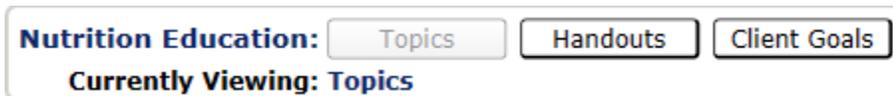
- By an individual CPA –
 - An infant is assigned the risk factors Improperly Diluted Formula and Infant born to a Woman with Mental Retardation. There is limited family support. Neither of these risk factors are high risk, but you want to be sure the infant is seen by the dietitian for secondary nutrition education and assign PDHR.
 - The risk factor “Pregnancy at a Young Age” is not high risk. A CPA seeing a very young teen mom with no other high risk factors, but very unsettled family life, might decide to assign PDHR.
- As a clinic policy - The risk factor “Pregnancy at a Young Age” is not high risk. A clinic might make a policy that all teen moms will get extra attention, so clients with this risk factor are to made PDHR if there are no other risk factors to make them High Risk.

To make a client PDHR, click the **[Add]** button. A **Reason** field appears where you can document information. When you save the window, this field will disappear and PDHR will display in the client header. Unless it is clinic policy, one would expect to see documentation in Notes because others should be able to read the notes and be alerted to the situation.

Nutrition Education

The next link in April's WIC Certification Guide is **Nutrition Education**. Click on this link to open the Nutrition Education window.

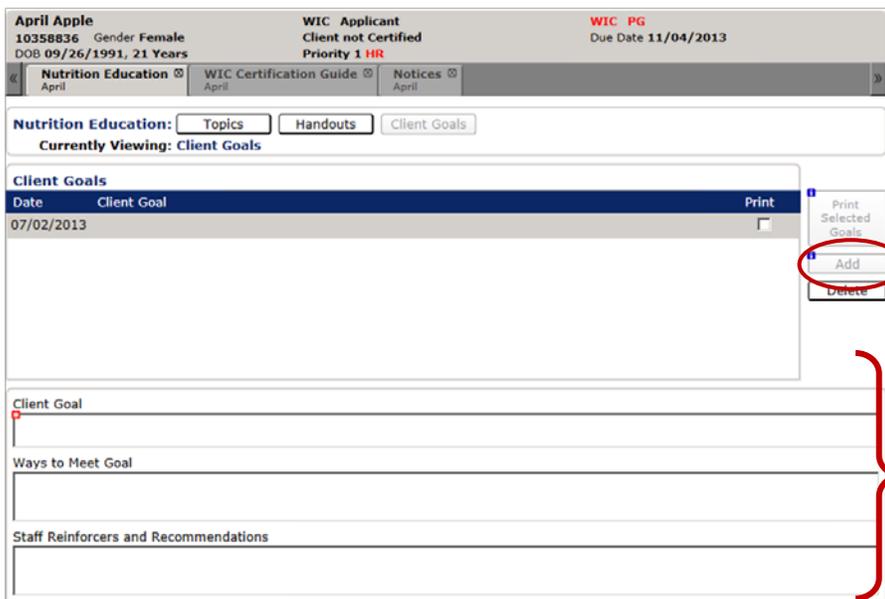
Like the Health Interview window, the Nutrition Education window consists of three Navigational buttons.



These buttons are used to document various aspects of nutrition education provided to the client.

Client Goals

The main purpose of the Client Goals Tab is to document information about the client's goals related to nutrition and health. This is such an important part of the WIC visit that there is a separate link in the WIC Certification Guide. It is suggested that you complete the Client Goals tab first so you are better able to select appropriate topics and handouts.



As with many windows in KWIC, click [**Add**] to get blank fields for you to record today's information.

- **Client Goal**

Encourage the client to identify a goal related to nutrition or health considering the concerns she already identified or items that you determined to be risks in the assessment. Enter a short description of the client's goal. At least one goal must be

entered. If a client is very non-responsive and have no interest in setting a goal, staff can document that fact.

Many clients not think about goals, so you might try to use words **other** than just “What goal do you have for your eating or health?” Consider if these examples might conversation-starters for you to try.

- “You mentioned that you’re concerned about not gaining enough weight with this pregnancy. How much would you like to gain in the next __ months?”
- “You said that breastfeeding is going well. About how many months would you like to breastfeed?”
- “You wrote on Billy’s diet questionnaire that you would like him to eat more veggies. What is one change you would like to see in the next six months related to eating his vegetables?” Be prepared to offer a couple **concrete** suggestions if mom is unsure. “What do you think about tasting one vegetable besides potatoes every day?”
- “Your iron was really low today and you said it’s hard for you to eat better and remember to take your prenatal supplement. Would you like to talk about making a plan to eat more iron foods and take your supplement every day?”

It can be challenging to get clients to participate in developing a plan, so takes some practice in encouraging it. Ideally the goal should be the client’s idea, but sometimes it helps for the counselor to provide some suggestions to make it more concrete or, as in the last example, to make a suggestion based on a risk we have identified.

- **Ways to Meet Goal**

This section allows you to work with the client to identify a few concrete steps that can help the client reach the goal. It can take considerable skill to help the client think about very specific, realistic steps that they are likely to do. This information is for the client so the language and steps should be simple, concise, and doable. You might first need to explore barriers to the identified goal. Then ask the clients for some very specific possibilities to get around that problem. Many handouts offer a list of suggestions. Consider showing such a list to the client and asking something like, “Do you think any of these steps might work for you? If so, ask the client to identify which ones they might use or adapt. You can mark them on the handout and record in KWIC.

- **Staff Reinforcers and Recommendations**

This field is optional. It is a space for you to document what you would like to have reinforced at a future visit. This might be something reinforced during a visit with a dietitian or nurse at a one-on-one secondary education visit for this certification period, or at the next certification appointment. You might also note

recommendations made to the client or recommendations to WIC staff who may work with the client in the future.

- **Print Client Goal Check Box**

After you save the window, the client goal will display in the upper section. If desired, you can print the Client Goal and Ways to Meet Goal.

- Check the **Print** checkbox for the goal(s) you want included on the report.
- Click the **[Print Selected Goals]** button.

For each goal selected, the report includes the date the goal was recorded, the goal description, and the contents of the Ways to Meet Goal field.

Create a goal for April Apple. Add items in the Ways to Meet Goals field. Print the goal to see what the print-out looks like.

Click **[Save]** or just click another button in the Nutrition Education window and save when you've done all three. Every time you save, you create a contact in History.

Topics Tab

The Topics tab allows you to quickly document topics you have discussed with a client. (Remember, when you provide nutrition education, you will prioritize the client's interests, concerns, and risk factor to determine what topics you address.)

The topics are listed in alphabetical order on the left and are specific to client categories. Local clinics have the option to add their own topics. Client risk factors are listed in the upper right section of the window. Classes the client has completed also are displayed on this tab.

Include and exclude topics like you have learned with the previous mover boxes.

The screenshot shows the 'Topics' window for a client named April Apple. At the top, client information is displayed: April Apple, 10358836, Gender Female, DOB 09/26/1991, 21 Years, WIC Applicant, Client not Certified, Priority 1 HR, WIC PG, Due Date 11/04/2013. Below this is a navigation bar with tabs for Nutrition Education (selected), WIC Certification Guide, and Notices. The main content area is divided into three sections: 'Available Topics' (a scrollable list of topics like Healthy snacks, Healthy Eating Patterns, etc.), 'Client's Risks' (Low Hemoglobin/Hematocrit 2nd Trimester, Low Maternal Weight Gain, Maternal Smoking), and 'Discussed Topics' (a table with columns for Recorded date and Discussed Topic, showing entries from 07/02/2013).

Recorded	Discussed Topic
07/02/2013	Advantages of breastfeeding
07/02/2013	Dangers of alcohol, tobacco, and other drugs
07/02/2013	Healthy weight
07/02/2013	Iron

Use scroll bar to see all of the current risk factors.

The previous screen shot is a sample of April's Topics window. Notice that the date is recorded when a topic is moved to the right. This same window will be used for subsequent visits so the dates are useful to see if (and when) a topic was covered.

To document "Other"

Occasionally you will want to document a topic discussed but that is not included in the list of topics. There is a choice of "Other". As with any window that gives you a choice of "Other", you should document somewhere in the record what the "other" was. In this case, the best place to document it would be on the Notes window. You do not have to repeat all the topics on the Notes, just "Other".

Select some topics for April. You can save now or wait until you have done the other tabs in the Nutrition Education window and save all at once.

Handouts Window

The Handouts window allows you to quickly document handouts you provided to a client. (Remember, do not simply provide “packets” of handouts. Prioritize the client’s interests, concerns, and risk factor and try to select a pamphlet/s of real importance. Also it is best to review certain parts of the pamphlets, including marking some passages, and possibly using suggestions in a pamphlet to encourage the client to identify steps to changes.)

The handouts are listed in alphabetical order on the left and are specific to client categories. Local clinics have the option to add their own handouts. Client risk factors are listed in the upper right section of the window. Select handouts the same way that you select topics.

Select a handout or two for April. Save and close the Nutrition Education window and return to the WIC Certification Guide.

Notes

Notes have been discussed already in the module. But they are very important so we will mention them again! The nurse or dietitian will likely start a note early in the assessment process and add to it throughout the process. You do not have to repeat information documented elsewhere in the screens. Instead use the notes to record details and, if needed, expand upon information documented elsewhere in the record.

If you are used to the “SOAP” note format, think about writing things that would be “S” – Subjective. Examples of information to document are listed below.

- Details about Breastfeeding – frequency, number of wet and dirty diapers, etc
- Details about formula feeding – brand, amount, frequency, etc.
- Food dislikes and likes
- Food allergies
- Details about medical conditions – treatment, current status, etc.
- Unusual or outstanding things from the diet questionnaire and interview

Title Cert
Note April concerned about low weight gain. Had severe nausea but better now. Doing well on stopping smoking and hopes to quit, but not sure if she can. Doctor has talked to her about her low hgb and encouraged prenatals regularly.

Make a note for April. Save and close.

Now – Back to the WIC Certification Guide.

If you have been completing April’s certification windows as directed in this module, her WIC Certification Guide should look like this screen shot

Look at the Referrals link. It is marked “Complete” because the clerk has completed the four mandated referrals. A status will be marked for the mandatory referrals only if documented by another staff member on the **same** day.

April Apple		WIC Applicant
10358836	Gender Female	Client not Certified
DOB 09/26/1991, 21 Years		Priority 1 HR
WIC Certification Guide April		Notices April

WIC Certification for April Apple for category 'Pregnant'.

You have started a WIC Certification for April Apple.
To complete the certification, click on and complete each task 'Needed'

✓ Race and Ethnicity	Completed
✓ Dual Participation Test	Completed 07/02/2013
✓ Income Eligibility	Completed 07/02/2013
✓ Proof of Income	Completed 07/02/2013
✓ Proof of Residency	Completed 07/02/2013
✓ Proof of ID	Completed 07/02/2013
✓ Anthropometric Measurement	Completed 07/02/2013
✓ Blood Measurement	Completed 07/02/2013
✓ Health Interview	Completed 07/02/2013
✓ Assess Risk Factors	Completed 07/02/2013
✓ Nutrition Education	Completed 07/02/2013
✓ Client Goals	Completed
✓ Referrals	Completed
✓ Voter Registration	Completed
✓ Notes	Completed
Complete WIC Certification	Needed

But the nurse or dietitian needs to open the Referral link and add any more referrals. For example, April might be referred to the Maternal and Infant Program, the Breastfeeding Peer Counselor, and a Smoking Cessation program. Remember:

- Referrals are an important benefit of WIC.
- If you tell a client about a program, mark “Referred” even if they are not interested at this time.

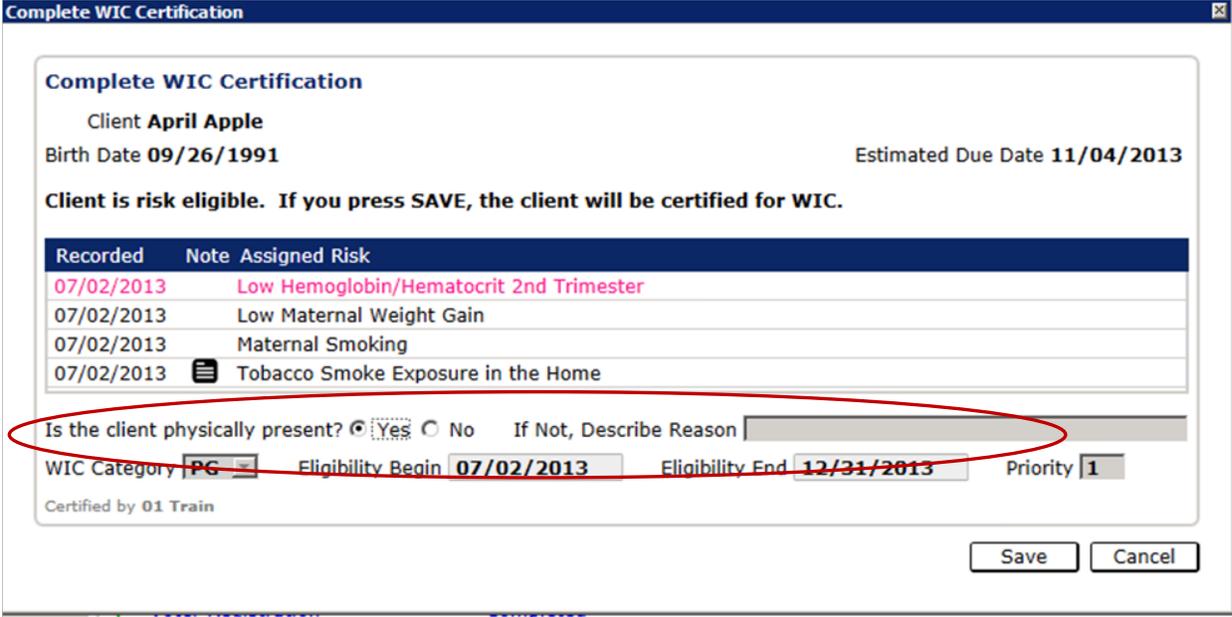
Even though referrals were marked earlier, we’ve learned more about April – she smokes. You should make a referral for smoking cessation, Kansas Tobacco Quitline, etc. Open Referrals now and add a referral for April.

Current Referrals to Client		Referral Status				
Date	Service	Has	Referred	Applied	N/A	Note
07/02/2013	Kansas Tobacco Quitline	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
07/02/2013	Child Support Enforcement	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

Complete WIC Certification

Click the **Complete WIC Certification link** on the WIC Certification Guide. The **Complete WIC Certification** window opens. The top of this window displays client identification information and a statement that the client is risk eligible. If the client is not risk eligible, a message will display upon saving that the client will be terminated. A Termination Letter will automatically print.

The information at the bottom of the window displays the client's WIC Category, Eligibility Begin and End dates, and Priority as read only information.



The screenshot shows a web application window titled "Complete WIC Certification". The client information is as follows:

- Client: April Apple
- Birth Date: 09/26/1991
- Estimated Due Date: 11/04/2013

A message states: "Client is risk eligible. If you press SAVE, the client will be certified for WIC." Below this is a table of recorded risks:

Recorded	Note	Assigned Risk
07/02/2013		Low Hemoglobin/Hematocrit 2nd Trimester
07/02/2013		Low Maternal Weight Gain
07/02/2013		Maternal Smoking
07/02/2013		Tobacco Smoke Exposure in the Home

Below the table, there is a question: "Is the client physically present?" with radio buttons for "Yes" (selected) and "No". A text field for "If Not, Describe Reason" is also present. At the bottom, there are fields for "WIC Category" (PG), "Eligibility Begin" (07/02/2013), "Eligibility End" (12/31/2013), and "Priority" (1). The window also shows "Certified by 01 Train" and "Save" and "Cancel" buttons.

Documentation of Physical Presence

The WIC Certification window contains the documentation whether or not the applicant was physically present. There are very few reasons when there can be approval for certification when a client is not physically present. (Refer Certification and Notification Policies module and to policy CRT 03.01.00 Exceptions to Being Physically Present.)

In general, these reasons are medical reasons such as doctor prescribed bed rest, medical equipment that makes it very difficult to come to the clinic and medical conditions that would be possibly worsened by coming to the clinic. A CPA must approve the exception in advance so there arrangements can be made to get height, weight, and blood work data from another source. There should be a note in KWIC showing the CPA's approval.

KWIC defaults to "Yes" the client is physically present. If an exception has been granted, change the response to "No" and briefly record the reason in **If Not, Describe Reason**.

If you answer “no”, this is another case in which KWIC will automatically create a note in the Notes window, as in the example below. As an auto-generated note, KWIC created the title and a pre-determined note, with the text you entered for the reason.

Trini Thomsen			DOB 09/23/1989	17 Years
Client ID 1061486	WIC Category PG	Status Active	Elig End 03/31/2008	Due Date 01/20/2008 Priority 1

Date	Author	Title
09/20/2007	Train01s Train01s	Reinstatement to WIC
09/20/2007	Train01s Train01s	Termination From WIC
09/20/2007	Train01s Train01s	Not Physically Present
09/20/2007	Train01s Train01s	Cert

Created **09/20/2007 11:41 am** by **Train01s Train01s** at **Medicine Lodge WIC Clinic-Barber Co**

Title

Note

For the WIC certification completed 09/20/2007, the client was marked as not physically present. The reason entered was:
On bed rest..

Select “Yes” for April to indicate that she is physically present.

Click [Save]. A pop-up window displays “**WIC Certification Completed.**”

Click [OK] to return to the client’s record.

Notice the following in the Client Header:

- Status changes to Active
- Dates of the Certification Period displays
- Priority displays
- The red HR indicated that April is High Risk.

April Apple	WIC Active PG
10358836 Gender Female	Cert. Period 07/02/2013 to 12/31/2013 Due Date 11/04/2013
DOB 09/26/1991, 21 Years	Priority 1 HR

Important Reminder: The “Cinderella Rule”. All certification information entered today can be changed today, however, tomorrow the information will display as read-only. Data magically becomes permanent at the stroke of midnight! As before, there are still certain features in KWIC that allow you to change or correct data at a later date (e.g. Change Due Date, Change Birth Date, Correct Anthropometric Measurement, Correct Blood Measurements)

Finishing Up the Certification

When you saved the Complete WIC Certification window, you finished certifying April and KWIC returned you to her Notices tab. The Notices tab should look like this for April – and if you followed the steps, it will also look like this for Allen because we completed some information for Allen as we went along.

Group Members April Apple Allen Apple <input type="checkbox"/> Hide Inactive Clients Add New Group Member	April Apple 10358836 Gender Female DOB 09/26/1991, 21 Years		WIC Active PG Cert. Period 07/02/2013 to 12/31/2013 Priority 1 HR	
	Notices April			
Quick Links for April Apple Client Homepage Notes Dual Participation Anthro Meas Blood Meas Health Interview Risk Factors Nutrition Education Referrals Change Due Date Record End of PG Survey History-Health Interview History-Nutrition Education History-Issuance Flowsheet Demographics Notices Reminders Rights & Responsibilities Sign for Checks	April DOB 09/26/1991 WIC Category PG Elig. End 12/31/2013		Allen DOB 05/23/2010 WIC Category C Elig. End	
	Next Appointment	Schedule Appointment	Schedule Appointment	
	Proof of Residency	Complete	Complete	
	Proof of Income	Complete	Complete	
	Proof of Identity	Complete	Complete	
	Proof of Caregiver Identity	N/A	Complete	
	Dual Participation Test	Tested 07/02/2013	Tested 07/02/2013	
	Basic Contact	Complete	Needed	
	Hct/Hgb	Complete	Complete	
	Special Authorization			
	Survey	N/A	N/A	
	End WIC Eligibility Letter	N/A	N/A	
	Referrals	Referrals	Referrals	
	Immunizations	N/A	Immunization	
	Cautions	<input type="text"/>	<input type="text"/>	

The [Basic Contact](#) link is marked “Complete” because the clerk opened the Voter Registration link in the certification guide earlier and saved it. However, in your clinic, it might be the RN or RD’s responsibility to inform the client of some items in the Basic Contact section. If so, the RN or RD should click on the link and finishing moving the items after talking over the items with the client.

Ask your supervisor about the procedure and division of responsibility in your clinic related to Basic Contact information.

Now, let's do Allen's certification.

Click **Allen Apple** in the Group Members box to switch to the Child's record.



Click the **WIC Certification** Quick Link to open the WIC Certification Guide for Allen.

If you are recertifying a client who is still active, you will have to open the WIC Certification guide from Services drop down menu.

Certifying Allen

Look at Allen's WIC Certification Guide.

Notice that the:

- Dual Participation Test displays **Completed**. It must be completed on the day a client is certified. If it was done on a different day, it will have to be done again today.
- Income Eligibility and Proof of Income links are **Completed**. These were completed automatically when you verified income for the mother because you left the "Test" box marked for Allen so he was included in the Income test.
- Proof of Residency, Proof of ID, Proof of Caregiver ID, Anthropometric Measurement, Blood Measurement, and Health Interview are all **Completed**. Remember when we changed to Allen's record and recorded all of those things at the same time we recorded the information for April? If you did not complete any of these as you followed along in previous module pages, do so now.

WIC Certification for Allen Apple for category 'Child'.	
You have started a WIC Certification for Allen Apple. To complete the certification, click on and complete each task 'Ne	
✓ Race and Ethnicity	Completed
✓ Dual Participation Test	Completed 07/02/2013
✓ Income Eligibility	Completed 07/02/2013
✓ Proof of Income	Completed 07/02/2013
✓ Proof of Residency	Completed 07/02/2013
✓ Proof of ID	Completed 07/02/2013
✓ Proof of Caregiver ID	Completed 07/02/2013
✓ Anthropometric Measurement	Completed 07/02/2013
✓ Blood Measurement	Completed 07/02/2013
Health Interview	Needed
Assess Risk Factors	Needed
Nutrition Education	Needed
Client Goals	Needed
Referrals	Needed
Voter Registration	Needed
Immunization	Needed
Notes	Needed
Complete WIC Certification	Needed

- Voter Registration and Referrals both show needed, but in practice, the clerk might also complete those screens for Allen when doing April's.
- Links on the Child's WIC Certification Guide are a bit different than the links on the mother's WIC Certification Guide.

There is a link to open the **Immunization** window on WIC Certification Guides for Infants and Children.

Immunization



Special Assignment for Immunizations

- Talk with your supervisor about:
 - your role in assessing immunizations and completing this screen, and
 - the KSWebIZ Local WIC Clinic Interface plans for assessing immunization status and, if needed updating KSWebIZ.
- If you will be completing this screen:
 - Read on-line policy [08.01.00 Immunization Screening and Referral](#).
 - Open KWIC Help – Help Contents – Services – Immunization. Review all the associated immunization Help screens.
 - Work with your supervisor to observe other staff using this screen in clinic.

There is an interface between KWIC and the Kansas Immunization Registry (KSWebIZ). This is **not** available in the training environment so you will not be able to see what the screens really look like. **Here is a sample of the Immunization screen for a real client.**

Follow the instructions in the Special Assignment box above.

Client ID 10394230			WIC Category C	Status Active	Elig End 01/31/2010
Date	Status	If Behind	<input type="button" value="Add"/> <input type="button" value="Delete"/>		
07/16/2009	Current for Age				
07/13/2009	Behind for Age	Shot Provided			
11/20/2008	Current for Age				
07/17/2008	Current for Age				
11/20/2007	Current for Age				
Immunization Records			Recommendations		
Date	Immunization		Date	Immunization	
12/17/08	DTaP, 5 pertussis antigens6		09/30/09	Hib (PRP-T)	
01/14/08	DTaP-Hep B-IPV		09/30/09	Influenza, split (incl. purified surface antigen)	
03/19/08	DTaP-Hep B-IPV				
05/29/08	DTaP-Hep B-IPV				
11/13/08	Hep A, ped/adol, 2 dose				
06/15/09	Hep A, ped/adol, 2 dose				
07/13/09	Hep A, ped/adol, 2 dose				
11/13/07	Hep B, adolescent or pediatric				
09/15/08	Hib (PRP-T)				
10/13/09	Hib (PRP-T)				
01/14/08	Hib, NOS				
05/20/08	Hib, NOS				

Let's proceed with Allen in the training environment. Although the training environment is different from "real" KWIC, these aspects still apply.

Click on the **Immunization** link to open the **Immunization** window for Allen. Click the **[Add]** button to get a data field.

Status

There are three choices for Status

- Current for Age
- Behind for Age
- Record Not Available.

(Policy says to assess immunization status from a record, not the caregiver's memory.)

A screenshot of a web form showing a dropdown menu for 'Status'. The date is 07/02/2013 and the recorded by is 01 Train at Butler County. The dropdown menu is open, showing three options: 'Current for Age', 'Behind for Age', and 'Record Not Available'. There is also an 'If Behind' field to the right.

Choose "Behind for Age" for Allen.

If Behind Reasons

If an infant or child is behind in immunizations, there are three choices.

- Referred
- In Process/Upcoming Appointment
- Shot Provided

A screenshot of a web form showing a dropdown menu for 'If Behind'. The status is 'Behind for Age'. The dropdown menu is open, showing three options: 'In Process/Upcoming Appt', 'Referred', and 'Shot Provided'.

If you choose Referred here, a referral is automatically marked on the Referrals tab.

Choose Referred. Save and close to go back to Allen's WIC Certification Guide.

Click on the **Referrals** link. Notice there is already an Immunizations referral made!

Current Referrals to Client

Date	Service	Referral Status				Note
		Has	Referred	Applied	N/A	
07/02/2013	Child Support Enforcement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
07/02/2013	Food Stamps	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
07/02/2013	Medicaid	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
07/02/2013	TAF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
07/02/2013	Immunizations	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Referred for Immunization Status of Behind for Age

Mark the other four mandatory referrals listed. Add any other referrals that you want. Save and close to go back to Allen's WIC Certification Guide.

WIC Certification for Allen Apple for category 'Child'.

You have started a WIC Certification for Allen Apple.

To complete the certification, click on and complete each task 'Ne

✓	Race and Ethnicity	Completed
✓	Dual Participation Test	Completed 07/02/2013
✓	Income Eligibility	Completed 07/02/2013
✓	Proof of Income	Completed 07/02/2013
✓	Proof of Residency	Completed 07/02/2013
✓	Proof of ID	Completed 07/02/2013
✓	Proof of Caregiver ID	Completed 07/02/2013
✓	Anthropometric Measurement	Completed 07/02/2013
✓	Blood Measurement	Completed 07/02/2013
	Health Interview	Needed
	Assess Risk Factors	Needed
	Nutrition Education	Needed
	Client Goals	Needed
✓	Referrals	Completed
	Voter Registration	Needed
✓	Immunization	Completed
	Notes	Needed
	Complete WIC Certification	Needed

Notice that the Immunization and Referrals links are now changed to Completed.

Now you complete the rest of Allen's certification using the WIC Certification Guide. The module will not give you every detail, but here are a few screen shots as examples for **some** of the windows. You can use the information in the screen shots or make up something else.

Do not worry about evaluating for risk factors. Remember, if you are a nurse or dietitian, you will be completing the Nutrition Risk Factors module later.

Nutrition Risk Factors (Sample)

Allen Apple WIC Applicant **WIC C**
10358837 Gender Male Client not Certified
DOB 05/23/2010, 3 Years 1 Months

Assign Risk Factors Allen WIC Certification Guide Allen Notices Allen

Available Risk Factors

- Inappropriate Beverages as Primary Milk Source
- Inappropriate Use of Bottles, Cups or Pacifiers
- Feeding Practices Disregarding Developmental Needs
- Feeding Foods that Could be Contaminated
- Diet Very Low in kcal and/or Essential Nutrients
- Intake of Dietary Supplements w/ Harmful Effects
- Inadequate Vitamin/Mineral Supplementation
- Pica
- Possibility of Regression of Hemoglobin/Hematocrit
- Possibility of Regression of Weight
- Assumed Risk for Women & Children over 2 yrs
- Assumed Risk for Infants&Children btn 4 & 24 mos
- Dental Problems
- Disabilities Interfering with the Ability to Eat
- Nutrient Deficiency Diseases
- Cancer

Assigned Risk Factors

- 07/02/2013 Feeding Sugar-Containing Fluids
- 07/02/2013 Tobacco Smoke Exposure in the Home

Recorded 07/02/2013 15

Risk Assigned Based on MD Diagnosis

Feeding Sugar-Containing Fluids

Note

Koolaid at lunch most days (grandmas's house).

Nutrition Education – Client Goals (Sample)

Nutrition Education: Topics Handouts Client Goals
Currently Viewing: Client Goals

Client Goals

Date	Client Goal	Print
07/02/2013	Wants Allen to drink less Koolaid	<input type="checkbox"/>

Client Goal
 Wants Allen to drink less Koolaid

Ways to Meet Goal
 Talk to Grandma so she offeres small glass of milk at lunch instead of Kool-aid
 Take some WIC milk to Grandma's house so it is there.
 Give Allen his own water bottle to keep in refrigerator. Make a big deal that it is his own.

Staff Reinforcers and Recommendations

Nutrition Education – Topics (Sample)

« **Nutrition Education** Allen | **WIC Certification Guide** Allen | **Notices** Allen »

Nutrition Education: Topics Handouts Client Goals
Currently Viewing: Topics

Available Topics	Client's Risks
Lactose Intolerance	Feeding Sugar-Containing Fluids
Lead poisoning	Tobacco Smoke Exposure in the Home
Meats/protein foods	
Menu planning	
Moving to Lowfat Milk	
MyPlate Guidelines	
Other	
Parent/child feeding responsibilities	
Picky eaters	
Preschoolers Diet	
Safe food storage	

Discussed Topics	
Recorded	Discussed Topic
07/02/2013 15	Dangers of alcohol, tobacco, and other drugs
07/02/2013 15	Sugar-sweetened beverages

Nutrition Education – Handouts (Sample)

Nutrition Education:

Currently Viewing: Handouts

Available Handouts
Family Meal Brochure
Fitting in Fruits & Veggies
Food guide pyramid
Food guide pyramid for young children
Get rich with iron
Give me 5 fruits and vegetables every day
Go Foods/Slow Foods
Growing up fit

Client's Risks
Feeding Sugar-Containing Fluids
Tobacco Smoke Exposure in the Home

Handouts Given	
Given	Handouts Given
07/02/2013	HMBH-3 to 3 1/2 years

Notes (Sample)

Notes		
Date	Author	Title
07/02/2013	01 Train	Cert

Title

Note
Grandma cares for Allen every weekday while April works. Always has Kool-aid and gives at lunch, sometimes at snack and other times when he asks.

Complete the Voter Registration link. (No sample screen.)

Now look at Allen's Certification Guide.

Allen Apple 10358837 Gender Male DOB 05/23/2010, 3 Years 1 Months	WIC Applicant Client not Certified Priority 3
WIC Certification Guide Allen	Notices Allen

WIC Certification for Allen Apple for category 'Child'.

You have started a WIC Certification for Allen Apple.
To complete the certification, click on and complete each task 'Need'

✓ Race and Ethnicity	Completed
✓ Dual Participation Test	Completed 07/02/2013
✓ Income Eligibility	Completed 07/02/2013
✓ Proof of Income	Completed 07/02/2013
✓ Proof of Residency	Completed 07/02/2013
✓ Proof of ID	Completed 07/02/2013
✓ Proof of Caregiver ID	Completed 07/02/2013
✓ Anthropometric Measurement	Completed 07/02/2013
✓ Blood Measurement	Completed 07/02/2013
✓ Health Interview	Completed 07/02/2013
✓ Assess Risk Factors	Completed 07/02/2013
✓ Nutrition Education	Completed 07/02/2013
✓ Client Goals	Completed
✓ Referrals	Completed
✓ Voter Registration	Completed
✓ Immunization	Completed
✓ Notes	Completed
Complete WIC Certification	Needed

When you open the Complete WIC Certification screen, click [**Save**] and you are done with Allen's certification!

You should be back at the Notices window and the certification is done for both April and Allen.

Click on the Flowsheet Quicklink for April to enter a plan for April and Allen.

Melinda A Garrison		DOB 08/01/1980 29 Years	
Client ID 1061488	WIC Category PG	Status Active	Elig End 04/30/2010 Due Date 02/22/2010 Priority 1 HR
Notices	Flowsheet	Reminders	Demographics

	Melinda	Tyler
	DOB: 08/01/1980	DOB: 06/01/2006
	WIC Cat: PG	WIC Cat: C
	Elig End: 04/30/2010	Elig End: 04/30/2010
October, 2009		
November, 2009		
December, 2009		
January, 2010		
February, 2010		
March, 2010		
April, 2010		

You learned about the Flowsheet in the “Getting Started” module.

For review, let’s do the Flow Sheet for April and Allen.

Consider

- When does the certification end? For infants and children, it is helpful to just “start with the end” and plan for the recertification visit. For pregnant women like April, that step is more uncertain, so left out. It is also left out for clients who will not be eligible for recertification like a child turning five years old.
- Were all proofs provided or do they need an appointment next month to bring proofs and get more checks? ***April brought all proofs today.***
- Is anyone in the family High Risk or Professional Discretion High Risk so needs to see the RD? ***April is High Risk, but Allen is not***
- When is the RD scheduled to come? ***Let’s pretend the RD will be on site in two months.***

Here is a sample of what the nurse or dietitian might select for a plan on the Flow Sheet.

April needs an RD appointment, and we are pretending the RD will be coming in two months. Allen can have a Nutrition Education Individual (NEI) with the dietitian at the same time.

April Apple		WIC Active PG	
10358836 Gender Female		Cert. Period 07/02/2013 to 12/31/2013 Due Date 11/04/2013	
DOB 09/26/1991, 21 Years		Priority 1 HR	
« Flowsheet April		Notices Allen	
	April DOB 09/26/1991 WIC Category PG Elig. End 12/31/2013	Allen DOB 05/23/2010 WIC Category C Elig. End 1/31/2014	
July, 2013	<input type="text"/>	<input type="text"/>	
August, 2013	<input type="text"/>	<input type="text"/>	
September, 2013	High Risk (RD)	Nutrition Ed Individua	
October, 2013	<input type="text"/>	<input type="text"/>	
November, 2013	Check Pickup	Check Pickup	
December, 2013	<input type="text"/>	<input type="text"/>	
January, 2014	<input type="text"/>	Recertification	

Because the RD is coming in two months, there needs to be just a Check Pickup between issuing checks at the RD visit and the end of certification.

The Flow Sheet is a **plan** that often changes.

Complete a Flow Sheet for April and Allen. Use this example or make your own choices. Remember that policy requires April to be offered a High Risk appointment (with the RD) for their secondary nutrition education visit because she is High Risk (note the red HR in her Client Header).

Click in the cell corresponding to each month and make a choice. Click [Save].

In clinic, all that would be left for April and Allen would be to

- Assign their food packages and get checks,
- be sure staff had provided all information about rules, cashing WIC checks, etc., and
- make their next appointment and provide an appointment letter.



Important Note

You will notice that many of the links displaying on the WIC Certification Guide also display in the Quick Links. When completing a certification it is important that you use the links in the WIC Certification Guide to open these windows rather than the Quick Links. A common error made by users is they open the WIC Certification Guide then use the Quick Links to open windows and enter information. The error occurs when they fail to click on the last WIC Certification link (Complete WIC Certification) which is the final step in completing the certification. This final step must be completed in order for the certification to be finished.

Remembering this will save you many calls to the Help Desk!

Special Notes about the Certification Guides for Infants and Children

WIC Certification for Charles Thomsen for category 'I'

You have started a WIC Certification for Charles Thomsen.
To complete the certification, click on and complete each task 'Ne'

Mother Identified	Needed
Race and Ethnicity	Needed
✓ Dual Participation Test	Completed 07/02/2013
Income Eligibility	Needed
Proof of Income	Needed
Proof of Residency	Needed
Proof of ID	Needed
Proof of Caregiver ID	Needed
Anthropometric Measurement	Needed
Blood Measurement	N/A
Health Interview	Needed
Assess Risk Factors	Needed
Nutrition Education	Needed
Client Goals	Needed
Referrals	Needed
Voter Registration	Needed
Immunization	Needed
Notes	Needed
Complete WIC Certification	Needed

The WIC Certification Guide for infants and children are very similar with a few differences. There is a **Mother Identified** link on the guide for infants, but only on the certification guides for children under 24 months of age. This link ensures that you will remember to complete the **Identify Mother of Infant** window. This window was already discussed with Allen Apple.

The Certification Guides for infants and children also are different in regard to the **Blood Measurement** link. Staff should understand the policy as written in CRT 07.02.01 “Determine Nutritional Risk – Hematological Test for Anemia.” KWIC is programmed so if an infant is too young to need a Hemoglobin test, “N/A” displays instead of “Needed”. Children that fall within

the policy circumstances when a hemoglobin test is not needed, “Completed” will display, along with the date of the last hemoglobin test.

Preparation for Future Training Modules

Soon you will complete the “Checks” training module. That module uses April and Allen Apple. If you skimmed through this module without certifying them, you need to go back and certify them now. Otherwise, you will have trouble with the “Checks” module.



STOP and STRETCH!



Certifying Mom and Breastfeeding Baby (BF Dyad)

In KWIC the client's priority is not displayed until the user clicks the last link on the WIC Certification Guide (Complete WIC Certification). To ensure that a mother and her breastfeeding baby have the same priority upon completion of their certifications you should complete their certifications using the following steps.

Complete these steps:

1. **For Mom** – Complete all of the required items on the WIC Certification Guide up through and including the Voter Registration link.
2. **For Baby** - Complete all of the required items on the WIC Certification Guide up through and including the Voter Registration link.
3. **For Mom** – Click the Complete WIC Certification link to open the Complete WIC Certification window. Look at the priority that KWIC will assign the mom based on the risks currently assigned. **Click [Cancel] to close the window without saving.**
4. **For Baby** - Click the Complete WIC Certification link to open the Complete WIC Certification window. Look at the priority that KWIC will assign the baby based on the risks currently assigned. **Click [Cancel] to close the window without saving.**
5. **For both Mom and Baby** - as appropriate, click the Assess Risk link and assign the corresponding breastfeeding dyad risk factor that will ensure mom and baby are assigned the same priority.
6. **For Mom** – Click the Complete WIC Certification link on the WIC Certification Guide and finish her certification.
7. **For Baby** – Click the Complete WIC Certification link on the WIC Certification Guide and finish the baby's certification.

Skill Builder

New Certification Client



Brenda Banana has arrived at your clinic for her new certification.

Use the WIC Certification Guide to certify her as a pregnant woman. Use the information provided here. Make up information not provided.

<p>Demographic Information:</p> <ul style="list-style-type: none"> • Date of Initial Contact: entered • Date of Birth: previously entered • Phone: Enter appropriate number • No message phone • No Phone Notes • Address: Enter appropriate information • No special needs • Interpreter: None • Primary Language - English • Not Migrant or Homeless • Race: White • Hispanic/Latino?: No • Allows info release to KSWebIZ 	<p>Income:</p> <ul style="list-style-type: none"> • Receives Medicaid • Family: 5 • Income: \$2535 Monthly • Source: Farmer's Bank • Proof of Income: both Medical Card and Payroll Stub <p>Other proofs:</p> <ul style="list-style-type: none"> • Driver's License • Utility Bill
<p>Other information</p> <ul style="list-style-type: none"> • Due Date: If needed, use Change Due Date and make her due 7 months from today 	<p>ATOD</p> <ul style="list-style-type: none"> • Smokes about 10 cigarettes per day, about the same as before pregnancy. • Does not drink and did not drink before pregnancy.
<p>Assess Risk</p> <ul style="list-style-type: none"> • Inadequate Prenatal Care • Dental Problems • Any other that might have been auto-assigned from the blood work and height/weight you made up. 	<p>Basic Contact/Voter Information</p> <ul style="list-style-type: none"> • Completed all • Voter registration: Already registered
<p>Referrals</p> <ul style="list-style-type: none"> • Medicaid: Has • Food Stamps (Kansas Food Assistance Program): Referred • TAF : Referred • Child Support Enforcement: Not Interested • M&I: Referred 	<p>Notes</p> <p>Has dental insurance – peritonitis at last dentist visit. Another dentist appt next week.</p>

Skill Builder

Recertification – Child



Billy Broccoli and his mother have arrived for his Recertification appointment. Check to see if there are any changes to Josh’s demographic information. Use the WIC Certification Guide to certify him as a child. Make up information not provided.

Remember: When recertifying an active client, you must open the WIC Certification Guide using the Services drop-down menu.

<p>Demographic Information:</p> <ul style="list-style-type: none"> • Message Phone: add a new appropriate number • Phone notes: Friend’s phone • Address: at same shelter • Homeless • Mother is not a WIC participant. • Allows information release to KSWebIZ 	<p>Income Information:</p> <ul style="list-style-type: none"> • Receives Food Stamps (Kansas Food Assistance Program) • Family: 3 • Income: \$900 monthly • Source: Employment • Proof: SRS Determination/Benefit letter <p>Other proofs:</p> <ul style="list-style-type: none"> • Letter/envelope • Birth Certificate, Driver’s License
<p>Health Interview:</p> <ul style="list-style-type: none"> • Stopped breastfeeding when about 1 year old • Medical Provider: Davis, L • Birth Sequence: 1 • Household Smoking: Yes • TV/Video Viewing: One hour 	<p>Measures:</p> <ul style="list-style-type: none"> • Height: 39 in. • Weight: 36 lbs. 2 oz • Hgb: 13.2
<p>Assess Risk:</p> <ul style="list-style-type: none"> • Homeless • Others you choose 	<p>Topics:</p> <ul style="list-style-type: none"> • Food Guide Pyramid • Healthy Snacks
<p>Handout:</p> <ul style="list-style-type: none"> • Food Guide Pyramid For Young Children • Nutritious Snacks Children Will Like 	<p>Referral:</p> <ul style="list-style-type: none"> • Medicaid: Applied • Food Stamps (Kansas Food Assistance Program): Has • TAF: Applied • CSE: Not Interested • Food Bank: Referred • Homeless Shelter: Has
<p>Basic Contact/Vote:</p> <ul style="list-style-type: none"> • Discussed all • Does not want to register 	<p>Notes:</p> <p>Wants to move and is worried about finding affordable housing.</p>

WIC Presumptive Eligibility Guide

A pregnant woman who meets the income and residency eligibility standards may be **presumed eligible** and issued WIC checks immediately for up to 60 days without a nutritional risk evaluation. Every effort should be made to provide a certification appointment within the 10-day processing standard instead of using presumptive eligibility. The LA should limit the use of this policy to cases of extenuating circumstances. Examples include, but are not limited to:

- A traveling clinic has too many appointments to complete a certification for a pregnant woman who walks in on clinic day.
- An unexpected staff illness that would otherwise cause cancellation of the appointment.

Here are some details.

- The WIC Presumptive Eligibility Guide may be completed by a clerk, nurse, or dietitian.
- The woman's nutritional risk evaluation must be completed within 60 days after she is presumed eligible, or the woman is terminated by KWIC.
- At the appointment to complete the certification (within 60 days of doing the Presume Eligible contact, the nutrition risk factor screen requires that at least one risk besides the Presumed Eligible risk factor be selected. (Or the woman will be ineligible as of that date.)
- The woman may subsequently reapply and be enrolled if found to be both income eligible and at nutritional risk.
- The Rights and Responsibilities must be signed. Proof of income, residency, and identity should be documented. If the client does not provide any of these proofs, the client can be presumed eligible and receive benefits for 30 days only.
- Presumed eligible clients have a client category of pregnant and a status of "Presumed" until the WIC Certification guide is completed later.
- Completing this guide documents a Presume Eligible in the client's Contact History.
- After completing a Presume Eligible visit, staff should immediately make an appointment to occur within the next 60 days, so the certification can be completed.

Let's go through an example.

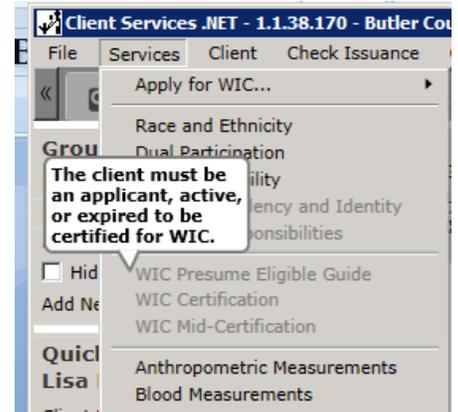
Lisa Lima is pregnant and here for her appointment. The nurse had to leave on a family emergency. There are no other CPAs in your clinic, so arrangements will have to be made for certifying clients. Because Lisa is here today and you (the clerk) know the nurse will not be back for a week, you use Presume Eligible to get her benefits going. (Note that this is a unique emergency situation. It is not acceptable to use Presume Eligible just because you are busy. You will rarely, if ever, use Presume Eligible.)

Find Lisa Lima and retrieve her WIC record.

WIC Presume Eligible Guide is not in the Quick Links or the Services Drop down. So you check the hover message. You're reminded that because she is Terminated, you must complete **Reapply for WIC**.

Use **Reapply for WIC** to create a record for Lisa. Pick a due date about 5 months in the future.

Select **WIC Presumptive Eligibility** from the Services dropdown menu. Do not select the **WIC Certification** guide!



Lisa Lima 10357077 Gender Female DOB 08/19/1987, 25 Years	WIC Applicant Client not Certified	WIC PG Due Date 12/05/2013
WIC Presume Eligible Guide Lisa	Notices Lisa	

Presumptive Eligibility for Lisa Lima

You have started a WIC Certification for Lisa Lima.
To complete the certification, click on and complete each task 'Needed' in the list below.

✓ Race and Ethnicity	Completed
✓ Dual Participation Test	Completed 07/02/2013
Income Eligibility	Needed
Proof of Income	Needed
Proof of Residency	Needed
Proof of ID	Needed
Health Interview	Needed
Referrals	Needed
Voter Registration	Needed
Complete WIC Presumptive Eligibility	Needed

You already know how to complete all of these windows. Here are some particular notes about the different windows in the **WIC Presumptive Eligibility** guide.

- The Health Interview window is included, but not required at this time. Complete the Health Interview window if it is normally your responsibility and there is time.
- Proofs are not required at the time of the Presume Eligible. The client can be presumed eligible without them; however, they must be entered to issue more than one month's worth of checks.
- Referrals are required to finish
- The Basic Contact tab is used to document Basic Contact and Voter Registration requirements. Because you will be issuing checks, one would expect that all the Basic Contact information should be covered at the time the client is presumed.

Complete the WIC Presumptive Eligibility Guide for Lisa. You can decide on income information, proofs, and whether or not to complete any of the Health Interview window.



Skill Builder
Presumed Eligible Client
New Client/New Group

Lynette Lentil has never been on WIC before (or any family members.) She is pregnant and walks into your satellite clinic and asks for WIC services. It is about 10 minutes before closing and you will not return for one month to this location. Lynette would have to drive many miles to reach your home clinic for an appointment within the 10 day processing standards. This would be an appropriate time to use the WIC Presumptive Eligibility Guide.

Use Apply for WIC the WIC Presumptive Eligibility Guide to enroll her.

When you are finished, look at the notices tab to see what it looks like when someone has forgotten proofs. (You will be able to issue one month of checks, but no more until she brings proofs and they are recorded in KWIC.)

<p>Demographic Information:</p> <ul style="list-style-type: none"> • DOB: She is 30 years old. Enter an appropriate birth date. • Due date: In 5 months. Enter appropriate date. • Hispanic/Latino: No • Racial Background: Hawaiian native • Phone #: Enter Appropriate # • Phone Note: call at lunch time only • Address: Enter Appropriate Info • No Special Needs • Primary Language: English • Not migrant or homeless • Allows information release to KSWebIZ 	<p>Income Information:</p> <ul style="list-style-type: none"> • Family: 5 • Income: \$475 monthly • Source: Target • Proof of Income: None with her. <p>Proofs:</p> <ul style="list-style-type: none"> • Has driver's license but nothing else.
<p>Additional Information: No time to do Health Interview</p>	<p>ATOD: No time to assess.</p>
<p>Referrals:</p> <ul style="list-style-type: none"> • TAF: Referred • Food Stamps (Kansas Food Assistance Program): Referred • Medicaid: Referred • Child Support Enforcement: Referred 	<p>Basic Contact/Voter Information:</p> <ul style="list-style-type: none"> • Include all • Not interested in registering to vote

WIC Mid-Certification Guide

Quality of care must not diminish for breastfeeding women and infants who are certified for longer than six months, i.e. infants certified before 6 months of age and breastfeeding women certified before 6 months postpartum. A mid-certification appointment must be scheduled for both a breastfeeding mother and infant sometime when the infant is between 5 ½ months and 10 months of age. Infants who are not breastfed must also be scheduled for a mid-certification appointment in this timeframe.

See [CRT 03.03.00 Mid-certification Appointments for Infants and Breastfeeding Woman](#)

Details about mid-certification visits:

- For all infants initially certified before 6 months of age, schedule a mid-certification appointment approximately midpoint between the initial certification and the infant's first birthday.
- If an infant is breastfed and the mother is also a WIC client, schedule a mid-certification appointment for the breastfeeding mother.
- This appointment must be held when the infant is between 5 ½ months and 10 months of age and the breastfeeding woman is between 5 ½ months and 10 months since delivery. 5 ½ months is calculated as 5 months + 15 days.



Important consideration for scheduling!! Access to the Mid-Certification Guide is limited to:

- Infants who are between 5 ½ months and 10 months old.
- BF women who are between 5 ½ months and 10 months postpartum.

Staff that schedule appointments need to remember this rule and compare birth (delivery) date to the appointment date. It is frustrating to have a mom and baby arrive for their mid-certification appointment only to learn staff can not complete the appointment because the baby is 5 months and 1 week old!

- It is not necessary to obtain identity, residency, and financial information at mid-certification (unless there is a change in income).
- Assess the health/medical data and diet information changes, as well as provide nutrition education.

The Mid-Certification Guide is used to document a nutrition/medical assessment for infants between 5 ½ & 10 months in order to monitor growth, provide additional nutrition education, and to assess immunizations and health services. It is also used for Breastfeeding Women. **Because no proofs or income information is required, this guide is only available for staff members with RN or RD security status.** If a clerk

needs to add information, such as reassess income due to a change, or trained to take measures, the clerk can enter the necessary windows from the Quick Links or Services menu.

Use **Find Client** and retrieve the record for the infant Michael Melon. For a mid-certification visit, you will:

1. Click the Demographics tab and update the Client's data as needed.
2. Open **WIC Mid-Certification** on the Services drop-down menu or Quicklinks.

Mid-Certification Guide for Infant –

A Breastfeeding woman's would be similar – just without the Immunization link.

You already know how to complete these windows. Here are some details:

Michael Melon		WIC Active I
10358691	Gender Male	Cert. Period 04/20/2013 to 10/31/2013
DOB 10/01/2012, 9 Months		Priority 1
WIC Mid-Certification Guide	Notices	
Michael	Michael	

Mid-Certification for Michael Melon	
You have started a Mid-Certification Contact for Michael Melon. To complete the certification, click on and complete each task 'Needed' in the list below.	
✓ Race and Ethnicity	Completed
Dual Participation Test	Needed
✓ Anthropometric Measurement	Completed 04/20/2013
Health Interview	Needed
Nutrition Education	Needed
Client Goals	Needed
Immunization	Needed
Complete Mid-Certification	Needed

- Dual Participation must be completed on the day of any certification or mid-certification appointment.
- Anthropometric measures might show as completed, but should be done again at the mid-certification to fully assess the client.
- It is **very** important that you update the breastfeeding information in Health Interview for the infant. If have a midcert appointment for a breastfeeding dyad, but you learn that the infant has stopped breastfeeding, you will not have to complete the mid-certification visit for the mother. Instead you will terminate her as described in a different module.

- Additional referrals are not required to complete the mid-certification, but document any that you provide.
- Risk factors are not required, but if add risk factors if needed.
- When you complete the Mid-certification guide, KWIC will document a “Complete Mid-certification” contact in the client’s Contact History.
- You CANNOT open the Mid-certification Guide for an infant or breastfeeding woman outside the 5 ½ - 10 month time frame.

Complete the Mid-certification guide for Michael Melon. Add information that you decide might be reasonable for a mid-certification visit. Even though the Anthropometric measures is marked “Completed”, open the link and add new information that might be reasonable.



Note: When you complete the infant’s Mid-certification guide, it will still appear as a Quick Link. That is normal. Do not think that you have to do it over! If you have any question if it was properly done, open the client’s contact history and look for the “Completed Mid-certification” contact.

Skill Builder Mid-Certification



Angela Asparagus is a breastfeeding woman who has arrived at your clinic with her baby **Anna Asparagus**. They have a mid-certification appointment. Use the WIC Midcertification guide to complete both their mid-certifications.

Here is information for Anna. Make up appropriate information for mom.

<p>Demographic Information:</p> <ul style="list-style-type: none"> • New phone number: enter an appropriate new phone number • Message Phone: no change • New Address: enter an appropriate new address 	<p>Health Interview:</p> <ul style="list-style-type: none"> • Breastfeed: no change • Date Formula/Milk Introduced: no change • Date Solids Introduced: enter a date near 5 months of age • Formula information – no change • No supplements • Medical Provider: now Gartner
<p>Measures:</p> <ul style="list-style-type: none"> • Length: 25 ½ inches • Weight: 17 lb. 2 oz. 	<p>Other information:</p> <ul style="list-style-type: none"> • Mom reports he goes to bed with a bottle
<p>Assess Risk:</p> <ul style="list-style-type: none"> • Assign Inappropriate Use of Bottles or Cups 	<p>Topics:</p> <ul style="list-style-type: none"> • Introducing the cup
<p>Immunization/Referrals:</p> <ul style="list-style-type: none"> • Behind in Immunizations • Referred for Immunizations 	<p>Handouts:</p> <ul style="list-style-type: none"> • It's Time for a Cup • HMBH – 6 Months to a Year
	<p>Client Goals: Add a goal in which mom wants to wean from bottle by 1 year old.</p>



Congratulations - you are finally finished!

