



# Oregon WIC Program Local Agency Biennial Review Pre-visit Checklist

## **Instructions:**

- Please review the following pages and submit the requested materials in preparation for your upcoming WIC Program, Farm Direct Nutrition Program, and/or Breastfeeding Peer Counseling Program reviews.
- If you have questions, please contact your Nutrition Consultant.
- Please note that pages 4-5 specify items that need to be available during your on-site visit.
- Please submit the requested materials no later than **30 DAYS BEFORE** your on-site visit.
- Send all requested materials to **Niani Dünner** at:

E-mail (*preferred*): [niani.dunner@state.or.us](mailto:niani.dunner@state.or.us)

Mail: **Oregon WIC Program  
800 NE Oregon St, Suite 865  
Portland, OR 97232**

Fax: **971-673-0071**

If you need this material in an alternate format, please call 971-673-0040.



## Oregon WIC Program — Pre-visit Checklist

Please e-mail the following materials to Niani Dünner  
**30 Days BEFORE** your on-site visit:

- Copies of any local policies that are more restrictive than state WIC policy
- Copies of any locally developed WIC forms that replace state-developed forms
- WIC Personnel Summary (enclosed) completed by the Business Manager for your health department, non-profit, or tribal organization—including employees paid with Breastfeeding Peer Counseling Funds (if applicable).
- Names of staff who use WIC laptops outside of the normal clinic or satellite clinic setting.

**An electronic copy of your program's procedures/policies for the following required items (see Policy 420):**

- Program self-evaluation (Policy 215, 10.0)
- National Voter Registration Act (Policy 480, 15.1)
- Food instrument security (Policy 500, 5.0)
- Food instrument issuance (Policy 505, 4.1; Policy 530; Policy 835)
- High-risk protocol: referring high-risk participants to the WIC RD/Nutritionist (Policy 661, 3.0)
- Farm Direct coupon security (Policy 1100, 11.1)

**If Applicable:**

- High-risk nutrition education telephone contacts (Policy 821, 6.0)
- High Risk Counseling using interactive video technology (Policy 822, 6.0)
- Second Nutrition Education using online classes (Policy 823, 4.0)
- Second Nutrition Education using self-paced lessons (Policy 824, 4.0)
- Home Visiting (Policy 621)

Please fax or mail the following **Farm Direct Nutrition Program** materials to Niani Dünner **30 Days BEFORE** your on-site visit:

- 10 pages of check registers and/or assurance lists from the most recent, complete Farm Direct Nutrition Program season.**



## Oregon WIC Program — Pre-visit Checklist

If you have a **Breastfeeding Peer Counseling Program**, please submit the following materials to Niani Dünner **30 Days BEFORE** your on-site visit:

- Electronic copies of any locally developed BFPC forms.

**A copy of your breastfeeding peer counseling program's procedures/protocols for the following required items:**

- Services provided by peer counselors (Policy 718, 2.0)
- Monitoring peer counseling contacts. (Policy 716, 2.0 - 3.0)
- Referral protocol for lactation issues outside of the peer counseling scope of practice. (Policy 716, 5.0 and 718, 5.0)
- Documenting breastfeeding peer counseling contacts. (Policy 718, 3.0)
- Providing training and support to your peer counselors. (Policy 719)

**A copy of the following items:**

- Breastfeeding Peer Counseling Training Log.
- List of lactation referral resources available in your community.



## Oregon WIC Program — Pre-visit Checklist

Please review and have the following materials available  
**DURING** your on-site review:

- Compliance findings from most recent review
- Group Nutrition Education outlines and learner objectives
- Documentation of completed program self-evaluation
- Locally developed client education and outreach materials
- Log of outreach activities
- Posted Non-discrimination statement in each clinic
- Lab equipment cleaning log
- Files for:
  - Medical Documentation
  - Participant Signature Forms
  - Breast Pump Release Forms
  - FI Stubs
  - Employee Signature Forms (if used by your agency)
  - Laptop and air card usage agreement forms (if applicable)
- Documentation of staff training: module completion in TWIST, quarterly in-services, Civil Rights training
- Your Nutrition Education Plan
- Copies of any written agreements your program has with other agencies for WIC-related services (such as):
  - Non-WIC Nutrition Education (provided by non-WIC staff)
  - WIC breast pump partnerships
  - Data sharing agreements
- Be prepared to explain how you handle security and inventory for:
  - WIC FI stock
  - WIC ID cards
  - Breast Pumps
  - Formula cans returned to the clinic
  - Farm Direct checks



## Oregon WIC Program — Pre-visit Checklist

Please have the following **Farm Direct Nutrition Program** materials available **DURING** your on-site review:

- Farm Direct Nutrition Program complaint procedure and log**
- Farm Direct class outlines and learner objectives**
- Check Stock Physical Inventory form and related Farmers' Market Administration screen print**

**Be prepared to explain how you verify FDNP eligibility prior to issuance (if applicable):**

- Via TWIST FM Issuance Screen
- Use pre-printed Client Eligibility Report
- Require participant to show current voucher
- Ask if infant participant was born in the year before the current Farm Direct season (example: December 31, 2012 for the 2013 Farm Direct season).
- Other (please explain)