Oregon WIC Introduction to WIC Module







Staff Training





"To receive the benefits (groceries) has been a blessing." ~Oregon WIC participant

Oregon WIC Training Introduction to WIC Module

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Debi VanderMey Barr, MS, RD

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Adrienne Paige Mullock, MPH, CHES

Revised: August 2014 Kim McGee, BS Adrienne Paige Mullock, MPH, CHES

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Thank you to the staff at the Oregon Health Authority and the staff at the local WIC agencies who helped in the completion and review of this module.





Oregon WIC Training	Introduction to	WIC Module	

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Online Training Module Evaluation www.surveymonkey.com/r/W7GXFT2

Starting the COREGON



Contents

- Introduction **S**–1
- S-2**Instruction Levels**
- **S**–3 Steps for Completing the Module
- Questions about WIC Experience
- Items Needed S-5

"WIC has helped me so much I just love it. I don't know what I would do without it."

~Oregon WIC participant

S-1 Introduction

Welcome to WIC! This module will help you learn basic information about how WIC works. Some areas of the module you will work through on your own. Other areas you will work through together with your Training Supervisor. Read this section — Starting the Module — to help you get started.

S-2 Instruction Levels

All new WIC staff will complete all lessons in this module.

S-3 Steps for Completing the Module

- This module is yours to keep.
- Feel free to take notes, highlight or write in it.
- Use the module as a reference when you are done with it.
- Complete the module by doing one lesson or one chapter at a time, depending on your work schedule.
- Ask questions if you need help to complete the module.
- Work together with your Training Supervisor to plan your training time.

Training Supervisor's name and phone number:

Steps:	Date Completed:
1. Complete <i>Questions about WIC Experience</i> in Section S–4.	
2. Meet with your Training Supervisor to discuss <i>Questions about WIC Experience</i> .	
3. Meet with your Training Supervisor to make a training plan. Use these time estimates to help plan the time it will take to complete the module. Chapter 1: 1 – 2 hours	
Chapter 2: 45 – 75 minutes	
Chapter 3: 40 – 60 minutes	
* You may need more time to complete your observations.	

Steps:	Date Completed:
4. Use the <i>Items Needed</i> checklist in Section S-5 to gather the materials necessary to complete the module.	
5. Complete the required lessons and activities. Write down any questions you have about the lessons and discuss them with your Training Supervisor.	
6. Meet with your Training Supervisor to complete Review Activities at the end of each chapter.	
7. Complete the <i>Posttest</i> .	
8. Discuss the <i>Posttest</i> with your Training Supervisor.	
9. Complete the online <i>Evaluation</i> .	
10. Your Training Supervisor will complete the Competency Achievement Checklist and print your Module Completion Certificate.	

S-4 Questions about WIC Experience

Your answers to these questions will help your Training Supervisor understand what you already know about WIC.

1. Have you worked for WIC in the past? If yes, describe.



2. Have you worked for another health department program in the past?



3. If yes, describe.



4. Have you ever been on WIC?



5. Have you ever known anyone on WIC?



6. How did you first learn about WIC?

10	S-4 ■ Questions about WIC Experience	ce

S-5 Items Needed

Items needed to complete the module

- Pen or pencil and highlighter.
- Access to the internet.
- Attachments located at the back of this module.
- Job Aids located at the back of this module.
- WIC Policy and Procedure Manual to read the policies (you do not need to make copies of the policies). Available online:
 www.healthoregon.org/wic > For Oregon WIC Staff > Policy Manual

Items to Make a WIC Notebook

- Three-ring binder or file folder.
- Notebook dividers (optional).
- Page protectors (optional).

Handouts

- ♦ <u>57 400</u> *WIC Nutrition For You and Your Family* (outreach brochure)
- ♦ 57 600 *WIC Folder*
- 57 630 My Rights and Responsibilities
- 57 632 What Proof to Bring to WIC
- 57 1001 WIC Food List.
- 57 1002 How to Shop with your eWIC Card
- ♦ <u>57 1008</u> Using Your Oregon eWIC Card

Forms

- 57 629 Participant Signature Form
- ◆ WIC Program Employee Signature Form

Other

- Oregon WIC Nutrition Education Guidance
- ◆ Online video series: <u>How to Shop with Your eWIC Card</u>

То со	omplete this lesson:	You will need:
1–1	WIC Notebook	Three-ring binder or file folder Notebook dividers (optional) Page protectors (optional)
1–2	Goal of WIC	Handout <u>57-400</u> : <i>WIC Nutrition for you and your family</i> (outreach brochure) Handout 57 – 600: <i>WIC Folder</i>
1–3	Who Works at WIC?	Job Aid: <i>Local WIC Staff</i> WIC Policy <u>660</u>
1-4	Confidentiality	Employee Signature Form, or the equivalent form for your local agency WIC Policy 450 WIC Policy 596
2–1	Nutrition Education	Job Aid: WIC Groups Oregon WIC Nutrition Education Guidance
2-2	Breastfeeding Promotion and Support	None.
2–3	WIC Foods	Handout <u>57 – 1001</u> : WIC Food List

To complete this lesson:		You will need:	
2–4	Referrals to Health and Social Services	Job Aid: Referrals	
		WIC Policy <u>481</u>	
		WIC Policy <u>880</u>	
		WIC Policy <u>885</u>	
3–1	Overview of Certification	Handout <u>57– 630</u> : My Rights and Responsibilities	
		Handout <u>57 – 629</u> : Participant Signature Form	
		Attachment: Certification Checklist	
		Job Aid: Overview of WIC Certification	
		WIC Policy <u>620</u>	
		WIC Policy <u>645</u>	
		WIC Policy <u>646</u>	
		WIC Policy <u>595</u>	
3–2	Proof of Identity,	Handout <u>57 – 632</u> : What Proof to Bring to WIC	
	Residency and Income	Handout <u>57-633</u> : No Proof Form	
		WIC Policy <u>610</u>	
3–3	Income Eligibility	Job Aid: WIC Income	
		Job Aid: Steps for Determining Income Eligibility	
		WIC Policy <u>451</u>	
		WIC Policy <u>611</u>	
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		WIC Policy <u>613</u>	
		WIC Policy <u>614</u>	
		WIC Policy <u>616</u>	
		WIC Policy <u>653</u>	
		WIC Policy <u>654</u>	

To complete this lesson:	You will need:
3–4 Issuing and Using the eWIC Card	 Compare First and Second Cardholders Helping Families Use the Benefits List
	 Handouts: 57 - 1008: Using Your Oregon eWIC Card 57 - 1002: Shopping with your eWIC Card 57 - 1001: WIC Food List
	Attachment: What Successful Shoppers Need to Know
	WIC Policies: • <u>510</u> • <u>511</u> • <u>561</u> • <u>635</u>
	 Videos: How to Shop with Your eWIC Card Setting Your PIN Shopping with Your eWIC Card Checking Your Food Balance Protecting your eWIC card
	TWIST Training Manual lessons: Ch. 3, <u>Lesson 1103</u> Ch. 3, <u>Lesson 1101</u>

NOTE

All **policies**, **videos**, **TWIST lessons**, most **handouts** and **evaluation** are available on the Oregon WIC website: www.healthoregon.org/wic. Hyperlinks to these resources are embedded in the PDF version of the Module, located on the *Staff Training Modules* page of the website.

Chapter 1 Overview of WIC



Contents

- 1-1 WIC Notebook
- 1-2 Goal of WIC
- 1-3 Who Works at WIC?
- 1-4 Confidentiality

"WIC has provided the mainstay of my children's diet for 3 1/2 years. I appreciate the help more than any words can express. Without your help my children wouldn't be as happy and healthy as they are today. Thank you."

-Oregon WIC participant

1-1 WIC Notebook

Items Needed

- Three-ring binder or file folder.
- Notebook dividers (optional).
- Page protectors (optional).

Objectives

After completing this lesson, you will be able to:

◆ Have a notebook or file for information that will be helpful onthe-job.

Overview

Your job in WIC will be much easier if you keep important information nearby. Your WIC Notebook will make it easy to refer to information while you are working.

WIC Notebook

As with any new job, your new job at WIC will require you to remember many details about policies and procedures. Use your WIC Notebook to keep important information that you will need to look at frequently. Don't keep everything in your WIC Notebook, just the items that you will use most often on-the-job.

Throughout this training module, and during other training you will receive at WIC, you will be given suggestions about what to keep in your WIC Notebook. Feel free to individualize your notebook by adding information that will be helpful to you! Update your notebook regularly to remove items you no longer need.

NOTE

If a three ring binder is not available, use a file folder instead.

Practice Activity

- 1. Review a WIC Notebook from a coworker.
- 2. Set up your WIC Notebook.
 - Insert your dividers. Label them:
 - General Information.
 - Eligibility Information.
 - Handouts.
 - Job Aids.

1-2 Goal of WIC

Items Needed

- ◆ Handout: *WIC Nutrition For You And Your Family* (outreach brochure)
- ◆ Handout: WIC Folder

Objectives

After completing this lesson, you will be able to:

- Describe the participants served by WIC.
- Describe how WIC improves the health of participants.
- Identify the history and purpose of WIC.
- Identify the source of WIC funding.
- Identify which Oregon counties are served by WIC.
- List the services provided by WIC.
- Describe participant centered services.
- List the four WIC eligibility requirements.

Overview

If you are new to WIC you probably have many questions. What does WIC stand for? What is WIC? Who does it help and how? Read on to find the answers to these and other questions.

What is WIC?



WIC stands for Women, Infants, and Children.

WIC's official name is the Special Supplemental Nutrition Program for Women, Infants and Children.

WIC is a **public health** nutrition program. It is designed to help families improve their health outcomes. Nutrition education, healthy foods, breastfeeding promotion and support, and referral services are the key benefits of the WIC Program. Nutrition education is designed to assist participants in identifying behavior changes that may have a positive impact on their health for the rest of their lives.

WIC focuses on specific areas to help improve health outcomes, such as:

- Reducing complications during pregnancy.
- Reducing iron-deficiency anemia.
- Decreasing the number of low birth weight and premature infants.
- Increasing the number of breastfeeding mothers.
- Improving growth and development of young children.
- Improving access to health care.



Who is Eligible for WIC?

The WIC program does not discriminate based on race, color, national origin, sex, age or disability. Applicants must meet four criteria to be eligible for WIC.

- 1. Live in a **residence area** served by a WIC clinic.
 - ◆ All of Oregon is served by WIC.
 - ♦ Each WIC clinic in Oregon serves a specific area.
- 2. Be in a **category** served by WIC. To be eligible, an applicant must be a:
 - ♦ Pregnant woman.
 - Breastfeeding woman with an infant under 12 months of age.
 - Non-breastfeeding woman through 6 months postpartum.
 - ♦ Infant under 12 months of age.
 - ♦ Child 1 to 5 years of age.
- 3. Have an **income** below the *WIC Income Guidelines* (see the *Income Eligibility* lesson for more information).
- 4. Have a **nutrition risk** a health condition or diet issue that can be helped with nutritious WIC foods and nutrition education. Some examples include:
 - Medical problems like cancer or eating disorders.
 - ◆ Anemia (low blood iron).
 - ♦ Pregnant teen.
 - ♦ Poor growth.
 - ♦ Health conditions like diabetes or high blood pressure.
 - ♦ Food allergies.

NOTE

Fathers, grandparents, foster parents or other guardians may apply for WIC for children in their care.

What Services Does WIC Provide?

WIC provides four primary services: nutrition education, breastfeeding promotion and support, WIC foods, and referrals to other health and social service programs. Each of these will be described further in Chapter 2. WIC strives to make these services available to all participants. When needed, WIC provides bilingual staff, interpreters and materials in other languages and formats.

Nutrition Education

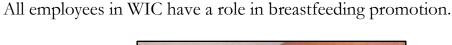
Better food habits lead to healthier families. WIC offers nutrition education to all WIC participants and their families. Through WIC nutrition education, families can learn to make healthy food and lifestyle choices. WIC nutrition education is participant centered, designed to meet the needs of each participant.

Nutrition education is offered in many different ways in WIC clinics throughout Oregon. Some participants receive **individual nutrition counseling,** while some review **online nutrition education** courses or self-paced written information. Other participants attend **group sessions,** either provided by the local agency or one of WIC's partners. Common class topics include infant feeding, breastfeeding and prenatal nutrition.

Breastfeeding Promotion and Support

As a premier public health program, one of WIC's roles is to promote and support breastfeeding. WIC does this by:

- Providing all WIC staff with basic breastfeeding training.
- Providing additional, advanced breastfeeding training for all certifiers.
- Providing education to women about breastfeeding during pregnancy and after delivery.
- Participating in community efforts to support breastfeeding.
- Providing additional food to women who are fully breastfeeding their baby to complement their increased nutrition needs.
- Providing breast pumps to women who need to pump their milk.





WIC Foods

WIC gives participants a special type of debit card called an **electronic benefits transfer (EBT)** or **eWIC card** to buy nutritious foods at the store. The participants receive **food benefits** for each month they are on WIC.

The foods that WIC provides help meet the special nutrition needs of pregnant and breastfeeding women and growing children. WIC foods are high in protein, calcium, iron and vitamins. WIC foods are only meant to supplement the participant's diet, they do not provide all the food and nutrients that the participant needs. The foods each WIC participant receives will vary, depending on their category and reason for being on WIC.

The basic foods WIC provides include:



Referrals to Other Health and Social Service Programs

Partnerships with other public health and social service programs are key to WIC's success. WIC encourages all participants to receive complete health care.

WIC is **required** to refer participants to **Oregon Health Plan** (Medicaid) if they are not already on that program. WIC is required to refer participants who are behind on their **immunizations** to their health care provider for shots. WIC is also required to screen women for **alcohol**, **tobacco** and other **drug use** and refer those with identified concerns.

Participant Centered Services

The Oregon WIC program provides all services using a participant centered approach - focusing on people's capacities, strengths and developmental needs – not solely on their problems, risks, or negative behaviors.

Participant centered services emphasize collaboration with the participant, giving the participant the freedom to choose the options that work for them, thereby encouraging participants to determine what is most important to them and to identify their own ideas for change. Active listening skills are critical to providing participant centered services. Four of these skills include:

- Using open-ended questions encouraging the participant to do most of the talking.
- Affirming showing appreciation and understanding, thereby increasing the participant's confidence in their ability to change.
- **Reflecting** a brief response that lets the participant know they've been listened to and helps check understanding of what is being said, or the emotion behind it.
- Summarizing allowing the participant to hear their thoughts about change thereby reinforcing what the participant has said.

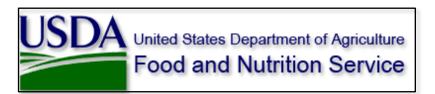
Is WIC Successful?

Since it was started in 1974, WIC has gained a reputation for being the premier public health nutrition program. WIC improves the health of nutritionally at-risk women, infants and children, and promotes positive lifelong health changes.

Studies, reviews and reports demonstrate that the WIC program is cost-effective in protecting or improving the health and nutrition status of low-income women, infants and children. It has been documented in government and university research that WIC saves health care dollars!

Who Funds and Administers the WIC Program?

WIC is federally funded by the United States Department of Agriculture (**USDA**). The state WIC office (located in Portland) manages the money from USDA – budgeting and providing each local WIC office with money to operate. The state WIC office is also responsible for ensuring that local WIC offices follow the USDA and state WIC regulations and procedures.



U.S. Department of Agriculture, Food and Nutrition Services (Washington, DC)

- Administers national WIC Program.
- Funds WIC Program.
- Issues rules and regulations.



Western Region USDA Food and Nutrition Services (San Francisco)

- Clarifies Federal policies.
- Oversees state and local agencies in the Western Region.



Oregon Health Authority, State WIC Office (Portland)

- Manages federal WIC funds.
- Sets program policies and procedures.
- Provides support to local agencies.

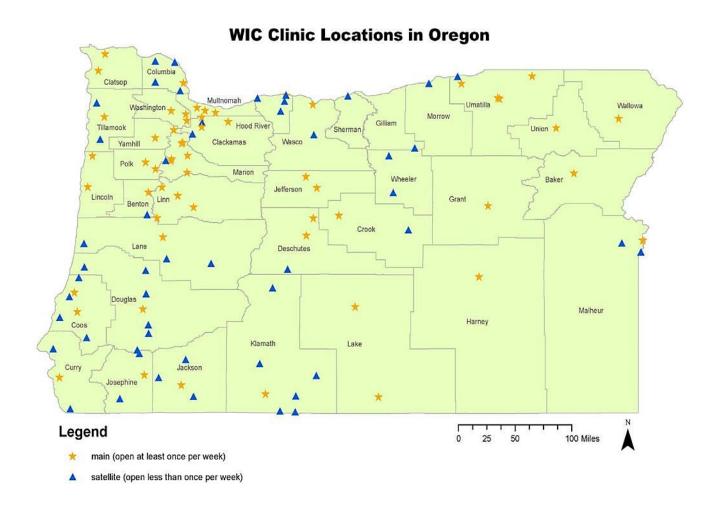


Local WIC Programs (throughout Oregon)

- Develops the local WIC budget and Nutrition Services Plan.
- Provides WIC services to participants.

Where are WIC Clinics Located?

Every county in Oregon is served by a **WIC clinic**. Many WIC agencies are located in health departments, but they are also located in tribal organizations, migrant health clinics, non-profit organizations and Head Start programs. Certain areas are served by more than one WIC program. Some WIC programs serve more than one county.



Summary

WIC helps Oregon families and communities in many ways.

• In Oregon, about 102,000 women, infants and children participate in WIC each month.

- In Oregon, about half of the pregnant women and a third of all children under 5 are on WIC.
- WIC food benefits provide an average of \$55 in nutritious foods to each participant monthly.
- ◆ These foods play an important role in increasing the nutrition intake of WIC households.
- WIC dollars play a significant role in the economic life of communities in Oregon.
- WIC participants spend about \$65 million at over 550 Oregon grocery stores and pharmacies using their WIC food benefits each year.

Oregon WIC's Mission Statement

Assure the provision of premier public health nutrition services by providing leadership, guidance and resources to local WIC programs, retailers and partners.

Practice Activity

- 1. Review the following pamphlets. Highlight or underline the information that will be most helpful to share with new participants. File the pamphlets in your WIC Notebook.
 - ♦ WIC Nutrition for You and Your Family (outreach brochure)
 - ♦ WIC Folder
- 2. Go to the Oregon WIC website www.healthoregon.org/wic
 - ◆ Using the menu on the left of the screen, click on "Find a WIC clinic." Find your local agency.
- 3. Speak with a coworker about how they are providing participant centered services.

Skill Check - Self Evaluation

1. What are the four eligibility criteria for participation in WIC?



2. What four main services does WIC provide?



3. Where does the money for WIC services come from?



1-3 Who Works at WIC?

Items Needed

◆ Job Aid: *Local WTC Staff* (located in the Job Aids section in the back of the module).

WIC Policies

♦ <u>WIC Policy 660</u> – Competent Professional Authority: Requirements.

Objectives

After completing this lesson, you will be abe to:

- ♦ Identify the WIC staff at your clinic.
- Briefly describe the job of each member of your staff.
- ◆ Identify your responsibilities at WIC.
- ♦ Describe how the state WIC office helps local agencies.
- Identify when to call the state WIC office for help.
- ♦ Describe your clinic's service area.

Overview

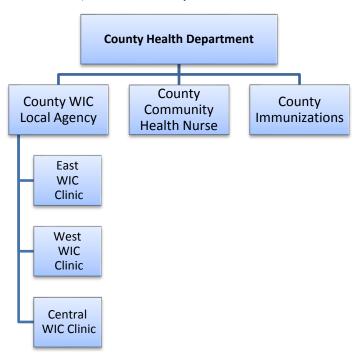
You may wonder who is on the WIC staff, both at your clinic and at the state WIC office. What do different members of the staff do? Where do you fit in? Who should you contact when you have questions or problems?

Where Does Your WIC Program Fit In?

Every WIC program in Oregon is part of a larger organization. Your program may be one of several programs within your county health department. Or, your clinic may be one of the services provided by a tribal organization, Head Start program or migrant health clinic.

There may also be more than one WIC clinic site within your organization. We call the main office of your WIC program the WIC **local agency** and each site a WIC **clinic**. Some local agencies have both permanent and satellite clinic sites.

- ♦ **Permanent clinic** sites are regularly staffed and equipment stays in the office.
- ◆ **Satellite clinic** sites are set up temporarily in borrowed space (churches, offices, other health clinics) and equipment is brought to that location just for the day.



Every WIC program has a **service area** — which is the particular group of people they are designated to serve. For example, county WIC programs serve the people in their county and tribal organizations serve tribal members. There are a few special WIC agencies that serve people from more than one county or are sponsored by other organizations. WIC works hard to make WIC services accessible to everyone.

Practice Activity

- 1. Talk to your supervisor or Training Supervisor about how your WIC program is organized.
 - ♦ What is your agency's service area?
 - ♦ Do any other WIC programs serve participants in your area?
 - ◆ Are you part of a larger organization?
 - ♦ Do you have more than one clinic site?
 - Do you have permanent and satellite sites?
- 2. Place an address/phone list of all your clinic sites in your WIC Notebook.

Who Works at Your WIC Clinic?

Many different people, with a variety of skills, work together to provide WIC services. All local WIC programs have a WIC Coordinator and at least one Nutritionist. They also have Competent Professional Authorities, Clerks, Receptionists, and sometimes Health Assistants. The number of WIC staff usually depends upon the number of WIC participants at the clinic.

In some clinics, one person may do more than one job. For example, the Nutritionist may also be the WIC Coordinator. The WIC Coordinator may also do the job of the Breastfeeding Coordinator, Training Supervisor and Local Agency TWIST Special User. Some clinics use a Health Assistant, others do not. Some WIC clinics have Breastfeeding Peer Counselors. As you read the following descriptions of WIC jobs, think about your job and where you fit in.

Clerk/Receptionist

A WIC applicant's first contact with the program is usually with the Clerk or Receptionist. The Clerk's responsibilities may include:

- ♦ Helping families through the application process.
- ♦ Screening families for eligibility.
- Scheduling and rescheduling classes and appointments.
- ♦ Promoting breastfeeding and nutrition education.
- ♦ Answering phone calls.
- Providing referrals to community resources.
- ♦ Offering voter registration.

Health Assistant

Some larger clinics have a paraprofessional Health Assistant to help with WIC appointments. The Health Assistant's responsibilities may include:

- ♦ Monitoring clinic flow.
- Bringing participants to the counseling area.
- ◆ Taking height and weight measurements.
- ♦ Testing hemoglobin.

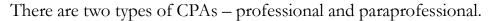
Competent Professional Authority

Competent Professional Authority (CPA) is the official name for the person on your staff who determines if people are eligible for WIC based on their nutrition risk factors. CPAs may also be called certifiers or nutrition assistants.

The CPA's responsibilities may include:

♦ Determining whether or not an applicant qualifies for WIC.

- ♦ Documenting medical and nutrition risk factors.
- Working with participants to identify their next steps and a second nutrition education opportunity.
- Providing nutrition counseling based on participant interests and concerns.
- Providing breastfeeding education and support.
- ◆ Assigning a food package.
- Facilitating nutrition education groups.
- Making referrals.
- Taking height and weight measurements.
- ♦ Testing hemoglobin.
- ♦ Issuing food benefits.



Professional CPA: A professional CPA may have a bachelor's or master's degree in a health profession, such as nutrition, nursing or health education. A professional CPA may be a physician, physician's assistant, registered dietitian or nurse.

Paraprofessional CPA: A paraprofessional CPA has at least a high school diploma or equivalent. The CPA is trained by WIC to learn how to certify and counsel participants. CPAs are supervised by a nutritionist or other health professional.

NOTE

Refer to WIC Policy 660 – Competent Professional Authority: Requirements for more information on the requirements of a CPA.



Nutritionist

Every WIC clinic has a Nutritionist. The Nutritionist is the local agency's nutrition expert. A Nutritionist has an advanced degree in nutrition, is a Registered Dietitian or is an Oregon Licensed Dietitian.

The Nutritionist's responsibilities may include:



- ♦ Certifying and counseling high- risk participants.
- ♦ Answering detailed nutrition questions.
- Writing nutrition care plans for high-risk participants.
- ♦ Training staff on nutrition topics.
- ◆ Facilitating nutrition education groups.

Breastfeeding Peer Counselor



A Breastfeeding Peer Counselor provides basic breastfeeding information and encouragement to pregnant and breastfeeding WIC mothers. She is a mother who has personal experience with breastfeeding and is participating or has participated in WIC.

Breastfeeding Coordinator

Each local agency has a Breastfeeding Coordinator. The Breastfeeding Coordinator has advanced training in lactation (breastfeeding) counseling, education and support.

The Breastfeeding Coordinator's responsibilities may include:

- Helping participants who are having problems breastfeeding.
- ♦ Answering questions from participants about breastfeeding.
- Facilitating breastfeeding groups.
- Coordinating breastfeeding promotion activities.

• Creating a clinic environment that supports breastfeeding.

The Breastfeeding Coordinator may also coordinate the breast pump loan program or your clinic may have a separate Breast Pump Coordinator.

WIC Coordinator

The WIC Coordinator is the leader of the WIC clinic. In some clinics, the WIC Coordinator is also the Nutritionist.

The WIC Coordinator's responsibilities may include:

- Making sure the WIC clinic runs smoothly.
- ◆ Supervising the WIC staff.
- ◆ Managing the WIC caseload (the number of participants on WIC).
- ♦ Completing required paperwork for the state WIC office.
- ♦ Communicating with the state office and distributing information from the state office to the rest of the staff.
- Making sure that program regulations are followed.
- Answering questions and making decisions.
- ♦ Managing the appointment schedule.
- ♦ Managing the WIC clinic flow.

Local Agency TWIST Special User

WIC uses a computer program to collect and store information about WIC participants. The computer program is called **TWIST** (<u>The WIC Information System Tracker</u>). Each Local Agency has designated a person who is an expert in how TWIST works. This person is called the Local Agency Special User. Contact your Special User if you have questions about TWIST.





Training Supervisor

You've already met your Training Supervisor! The Training Supervisor is a professional CPA and may also be the WIC Coordinator. The Training Supervisor's responsibilities include:

- ♦ Coordinating the training of the local WIC staff.
- Helping staff as they complete the WIC Training Modules.



Practice Activity

- 1. Using the Job Aid: *Local WIC Staff*, make a list of the staff in your clinic and note their jobs.
 - ♦ Work together with a coworker, your supervisor or Training Supervisor on this activity.
 - ◆ Do you have someone listed for all of the jobs you read about in this section?
- 2. Talk to your supervisor or Training Supervisor about your job at WIC. Where do you fit into the WIC team?
- 3. If you work in a clinic that is part of a larger organization, talk to your supervisor or Training Supervisor about how WIC fits into the

organization. Note on your Job Aid: *Local WIC Staff* if there are any people in the larger organization whom you may need to contact.

NOTE

When you are finished, file your Job Aid in your WIC Notebook.

Who Works at the State WIC Office?

The state WIC office has a wide variety of people on staff. They are experts on:

- ♦ Nutrition
- ♦ Clinic Management
- ♦ Breastfeeding
- ♦ Health Education
- ♦ TWIST
- ♦ Budget Management

- ♦ Document Layout and Publishing
- ♦ Outreach and Referrals
- ♦ Vendor (Store) Relations
- ♦ Training
- ♦ WIC Policies and Procedures

The state WIC office staff can answer questions such as:



NOTE

A state nutrition consultant is assigned to each local agency. Your state nutrition consultant will answer your general nutrition and policy questions.

Practice Activity

- 1. Go to the WIC website www.healthoregon.org/wic and click "Contact Us" (in the box menu, on the right-hand side) >"Oregon WIC Program" > 'Staff,' to become familiar with who works at the state WIC office.
- 2. Talk with your supervisor or WIC Coordinator about your job and in which circumstances you might need to contact the state WIC office.

Skill Check - Self-Evaluation

1. Who is your WIC clinic receptionist? Is there more than one?



2. Who in your clinic would answer complicated nutrition questions?



3. Who in your clinic would answer questions about breastfeeding?



4. Who in your clinic would answer questions about breast pumps?

5. Who in your clinic would answer questions about TWIST?



6. When should you contact the state WIC office? What is the phone number?



1-4 Confidentiality

Items Needed

◆ WIC Program <u>Employee Signature Form</u> for your local agency.

WIC Policies

- ◆ <u>WIC Policy 450</u> Confidentiality.
- ◆ <u>WIC Policy 596</u> Program Integrity: Acknowledgement of Employee Responsibilities.

Objectives

After completing this lesson, you will be able to:

Follow appropriate procedures for confidentiality of WIC information.

Overview

As a WIC employee you will regularly handle participants' personal information. Keeping their information private and confidential is an important part of your job.

There are two key points to confidentiality at WIC.

- 1. Do not release information from a participant's file without consent.
- 2. Maintain the privacy of WIC participants at all times.

Practice Activity

- 1. Read WIC Policy 450 Confidentiality.
- 2. Read WIC Policy 596 Program Integrity: Acknowledgement of Employee Responsibilities.
- 3. Read other local policies on confidentiality as requested by your Training Supervisor.
- 4. In the presence of your supervisor, read and sign the *WIC Program Employee Signature Form* provided by your local agency.

Skill Check - Self-Evaluation

1. What are three examples of a breach of confidentiality?



2. How will you keep the information on your computer private?



Review Activity

With Your Training Supervisor

- 1. Discuss your questions about Chapter 1.
- 2. Review your WIC Notebook. It should now include:
 - WIC Nutrition For You and Your Family (outreach brochure).
 - WIC Folder
 - Job Aid: *Local WIC Staff*.
 - Address/Phone list of your clinic sites.
- 3. Explain to your Training Supervisor what WIC is and how it helps people.
- 4. Give your signed WIC Program Employee Signature Form to your supervisor.

Chapter 2 WIC Services



Contents

- 2–1 Nutrition Education
- 2-2 Breastfeeding Promotion and Support
- 2-3 WIC Foods
- 2–4 Referrals to Health and Social Services

"The convenience of being able to do online classes on my own time is great! I don't have to worry about childcare and I don't miss a class or appointment because I am not feeling well. Thanks!"

~Oregon WIC participant

"I enjoy talking with moms, being someone they can count on and trust. I like breaking down the medical jargon and providing a close relationship that's not professional like the doctors or lactation consultants."

~Oregon WIC participant and Breastfeeding Peer Counselor

2-1 Nutrition Education

Items Needed

- Job Aid: *WIC Groups* (located in the Job Aids section in the back of the module).
- ◆ Oregon WIC Nutrition Education Guidance, 2010.

Objectives

After completing this lesson, you will be able to:

- Explain the purpose of nutrition education in WIC.
- List two types of WIC nutrition education options offered at your agency.
- Explain why marketing nutrition education is important.
- Describe your role in promoting nutrition education.

Overview

Nutrition education (NE) is the cornerstone of the WIC Program and is the primary service that distinguishes our program from other nutrition assistance programs (like SNAP). Participants, just like many of us, have busy lives. Finding the time to take advantage of the nutrition education services offered by WIC may seem overwhelming for families. WIC staff can market nutrition education in a way that helps participants understand the value of participating in this service.

Nutrition Education

Nutrition plays a critical role during stages of rapid growth and development, such as pregnancy, infancy, and early childhood. The purpose of **nutrition education** (**NE**) in WIC is to **improve the health outcomes** of participants. WIC shares information about nutrition and works with participants to help them find ways to incorporate this information into their lives. This service has the potential to positively impact the lives of WIC participants and their families! Each participant has a nutrition education contact at least once every three months, which means WIC has many opportunities to provide meaningful nutrition education to participants.

WIC aims to offer nutrition education opportunities that meet the needs of the participant. Since our participants have diverse needs, WIC offers many different types of nutrition education.

Types of Nutrition Education

Nutrition education options available at your agency might include:

Individual

The individual nutrition education appointment involves a WIC staff member talking one-on-one with a participant. The conversation is tailored to focus on the specific nutrition interests or concerns of the participant.

High-Risk

High-risk visits are a type of individual nutrition education for participants with more serious health concerns. These participants

require more intensive nutrition counseling and work closely with the WIC nutritionist.

Group

Group nutrition education is facilitated by a WIC staff person and is offered to multiple participants at once. A variety of



group topics may be offered. Common group topics include: infant feeding, breastfeeding, or prenatal nutrition. Ideally, group education is offered in a participant centered way, where everyone can discuss topics and share questions and knowledge with the group. This allows participants to gather information from each other in a supportive environment where their culture, prior experience, and personal concerns are acknowledged and respected.

Online or Self-Paced Lessons



These nutrition education options are for participants who may not be able to attend individual or group sessions. Online nutrition education can be completed anywhere or anytime the participant can access the internet. Paper copies of self-paced lessons

can be completed independently by the participant in the clinic.

Off-Site

Off-site education involves nutrition education that meets WIC requirements, is at a location other than the clinic, and is provided at no additional charge to WIC participants. Examples of off-site WIC nutrition education could include:

- A breastfeeding class attended as part of hospital birthing classes
- Expanded Food and Nutrition Education Program classes offered through the Oregon State University Extension program, or
- Head Start parenting classes that addresses nutrition.



NOTE

For more information refer to the *Oregon WIC Nutrition Education Guidance (2010)* document, found online at

<u>www.healthoregon.org/wic</u> > For Oregon WIC Staff > Nutrition

Education > Nutrition Education Resources for Staff

Practice Activity

1. Ask your training supervisor about the different types of nutrition education (**NE**) currently offered at your agency and list them below.

Different types of NE:



- 2. Using the Job Aid: WIC Groups, write down the types of group education offered at your WIC clinic. Ask a coworker, supervisor or Training Supervisor for help.
- 3. If you are a certifier, talk to your Training Supervisor about observing group sessions or reviewing any online or self-paced lessons that are offered by your agency.

Marketing Nutrition Education

WIC can offer outstanding nutrition education programs, but if few people come, it has limited effectiveness. Marketing has the potential of improving participants' involvement in the nutrition education offered through WIC. Effective marketing is essential to the success of the nutrition education program offered at your agency.

Participants want to learn about things that are relevant to them. WIC wants to connect the types of nutrition education we offer to the needs and wants of participants. Marketing nutrition education in this way helps the participant see the value of it. Participants will take advantage of nutrition education opportunities when they recognize how they can benefit from it, and how it relates to their life.

What Does Marketing Mean?

For some people, the term "marketing" means advertising or a pushy salesperson. For many people associated with WIC, marketing means outreach or marketing the program to those who could potentially benefit from it. In its simplest form, marketing **is** matching a product to the needs of the consumer. In our case, the product is nutrition education and the consumers are the WIC participants.

A valuable strategy for marketing is creating and delivering a **positive image** of your nutrition education program—from a participants' point of view. When creating that image, base it on what participants tell you is important to them. This image can motivate participants to respond to nutrition education opportunities positively. When WIC staff communicate that nutrition education is fun, useful and valuable, WIC participants will be likely to view it that way as well. Marketing a positive image includes consideration of: **Place, Product, Price and Promotion**.



Place

The place is where the education happens. Is this environment friendly to the participant? Is it noisy or distracting? How can you make the environment comfortable and inviting to the participant?

The location for nutrition education doesn't have to be *ideal* for the education to be effective. However, making the education accessible to your participants and **creating an inviting environment** can encourage participants to take part. Since many WIC agencies now offer multiple types of nutrition education, we can talk with the participant to try and find a place that works for them.

Product

Nutrition education opportunities are the product. A good product is one that **matches the needs of the participant**. Listening closely to participants and offering the nutrition education that is appropriate for their situation will go a long way in marketing this product.

Price

WIC participants do not pay for nutrition education. However, coming to an appointment or attending a group has a "cost" for them in time and effort, and competes with other work, school, or family activities. Those costs can keep participants from taking part in nutrition education. To **minimize costs to the participant**, try coordinating nutrition education with other clinic visits, if possible. Schedule nutrition education at times and places that are most convenient for participants.

Promotion

Promotion is letting your participants know how they will benefit if they attend an appointment or group session. Like anyone else, participants need to know that the education will be useful to them in order for them to want to participate. To promote nutrition education effectively, the whole staff need to be involved in the marketing process.

Your Role in Marketing Nutrition Education

The nutrition education services WIC provides are an **opportunity** for participants to learn new information and skills and this is one of the many **benefits** of the WIC program. The success of a nutrition education program depends on the attitude of the **entire WIC staff**, including: clerks, certifiers, nurses, health educators and WIC coordinators. When everyone positively promotes education opportunities, you encourage the participant to want to participate in nutrition education, rather than attend because it is a "requirement."

Clerks

Clerks set the stage for all participant encounters. Clerks are the first contact a participant has with the WIC program. How that initial interaction goes has a huge impact on how open the participant is to

WIC and nutrition education. Clerical staff are encouraged to greet participants warmly and with respect, whether in person or on the phone.

In most agencies, clerks will be responsible for scheduling and rescheduling nutrition education, both on the phone and in person. During these conversations, it is ideal for clerical staff to communicate that nutrition education is



important, worthwhile and fun. When participants call with questions about education, clerical staff will direct them to a certifier, health professional or group session. The words clerical staff use set the tone for this next interaction.

Practice Activity

1. Compare these responses.

Column A	Column B
"You have to see the WIC nutritionist today."	"You have the opportunity to see the WIC nutritionist today."
"I think you should sign up for the breastfeeding class."	"It looks like there are a few open spots in the breastfeeding class. Other moms tell me they hear interesting and helpful information. How does that sound to you?"

Which co.

Which column projects a more positive image?

2. How would you feel if someone were to use these statements with you?



3. Underline the key words that made a difference in the tone of each statement.



Certifiers, nurses, dietitians and health educators

Certifiers, nurses, dietitians and health educators can link what the participant has been discussing at the certification or follow-up visit to the most relevant education option available. Matching the participants' needs and desires with what we offer is at the heart of participant centered services. Think about the participants' situation. Is this a new mom, or a long-time WIC participant? Is this a mom with several small children, or a newly pregnant woman? A mother whose child is growing well, but is worried about his mealtime pickiness might best be served in a group about toddler feeding or picky eaters.

The certifier works with the participant to select the nutrition education that is most appropriate for the participant.

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Practice Activity

1. Circle the statement that applies what the participant has discussed with the nutrition education offered.



Statement A: "We'd like you to try to come to one of these classes sometime in the next 6 months. Which one would you be interested in?"

Statement B: "I think the group Infant Feeding, offered next month, will be very helpful for you. We talked about what kinds of solid foods and finger foods would be good for little Julie, and this group will give you lots of practical tips for feeding your baby. It will also give you an opportunity to hear how other mothers have handled their babies' feeding. How will that work for you?"

2. Why is it important to match the nutrition education offered to the participants' interests?



3. Observe a coworker promoting and/or scheduling nutrition education for at least three participants.

Skill Check - Self-Evaluation

1. What is the purpose of nutrition education in WIC?



2. What are two types of WIC nutrition education options offered at your agency?



3. Why is marketing nutrition education so important?



4. Talk with your Training Supervisor about your role in marketing nutrition education.

2-2 Breastfeeding Promotion and Support

Objectives

After completing this lesson, you will be able to:

- Describe the purpose of breastfeeding promotion.
- Describe the types of breastfeeding support WIC offers participants.

Overview

Human milk is the perfect food for babies, and breastfeeding is good for mothers, families and communities. WIC promotes breastfeeding in order to establish breastfeeding as the norm for infant feeding. WIC provides ongoing guidance to help moms succeed with breastfeeding. Increasing breastfeeding duration leads to healthier moms and babies.

Many people are not aware of the emphasis WIC places on breastfeeding promotion, since WIC also provides infant formula. WIC's priority of promoting breastfeeding is reflected in program policies, activities, trainings, participant education and clinic environments.

Breastfeeding support is offered to all pregnant and breastfeeding women. Some types of breastfeeding support offered at WIC clinics include:

- Breastfeeding support groups
- Breast pump information
- Breastfeeding experts to help with breastfeeding problems
- Breastfeeding peer counselors

Breastfeeding Education

WIC helps mothers to prepare for breastfeeding prenatally, so that

breastfeeding gets off to a good start once baby arrives. WIC continues to provide guidance during the early weeks and months, offering answers to questions, and solutions to any breastfeeding difficulties that arise. All WIC agencies provide individual counseling and breastfeeding education and support both prenatally and during the postpartum period.

In **prenatal education**, the focus is on how a mom's body is preparing for breastfeeding, planning for baby's birth, the value of skin-to-



skin contact, the importance of early, frequent feedings, establishing good milk production, and what to expect in the early days at home.

Postpartum education is provided at a time when baby and mom are getting to know each other. While breastfeeding is a skill that babies are born with, it does take some practice. WIC provides information on infant growth and development, and helps parents to better understand their baby's behavior and how to respond appropriately to their baby's cues.

In addition to one-on-one support, some agencies offer breastfeeding groups for breastfeeding families. WIC may also provide breast pumps to moms who need them for medical reasons, or for moms returning to work or school. If difficulties arise with breastfeeding, most agencies have staff with specialized training in breastfeeding support to help.

Breastfeeding Peer Counseling

The state office provides special funding to a number of local agencies to provide **Breastfeeding Peer Counseling (BFPC)** services. The Peer Counseling program teams breastfeeding peer counselors with **International Board Certified Lactation Consultants (IBCLCs)**, and is in addition to the standard breastfeeding education and support that all pregnant and breastfeeding women receive in WIC. Services focus on preventing breastfeeding problems, by working with pregnant women—before

baby is born—to build self-confidence for mothering and

breastfeeding. BFPC staff provide support through group, individual and phone contact, and continue to provide support postpartum. The goal of the program is to help more mothers to exclusively breastfeed for one-year and beyond, as recommended by the American Academy of Pediatrics and the World Health Organization.



World Breastfeeding Week

Oregon WIC encourages local agencies to participate in World Breastfeeding Week, which is officially celebrated August 1-7 every year. Since 2011, August has also been recognized as National Breastfeeding Month in the United States.

Each agency is encouraged to do something to celebrate or recognize breastfeeding, whether in August or at another time during the year. Some ideas include putting together a Mother's Tea or Breastfeeding Carnival/Fair, participating in a special walk, purchasing resources for libraries or hospitals, making a bulletin board, or speaking to community groups.

More information on this event can be found on The World Alliance for Breastfeeding Action's website at http://www.waba.org.my

NOTE

You will learn more about breastfeeding in the Level 1 Online *Breastfeeding Course*.



Practice Activity

- 1. Interview your Breastfeeding Coordinator to discover what your agency is doing to promote breastfeeding.
- 2. Ask your Training Supervisor what types of breastfeeding support are offered at your clinic.



- 3. Who do you refer participants to if they have breastfeeding issues or concerns?
- 4. If your agency offers Breastfeeding Peer Counseling, talk to your Breastfeeding Peer Counseling Coordinator to learn how this works in your agency.



Skill Check – Self-Evaluation

1. What is the purpose of breastfeeding promotion?



2. What are the types of breastfeeding support your agency offers participants?



2-3 WIC Foods

Items Needed

♦ Handout: WIC Food List

Objectives

After completing this lesson, you will be able to:

- ◆ Describe why each food is provided by WIC.
- ◆ Describe the basic food packages available to each category of participant.
- ◆ State how your clinic delivers the Farm Direct Nutrition Program to WIC participants.

Overview

WIC foods may be the service that first attracts potential WIC participants. WIC foods are selected because they provide specific nutrients. The WIC program is different than SNAP (Food Stamps) because WIC participants can buy only specific, nutritious foods. The participant uses a special type of debit card called an **electronic benefits transfer (EBT)** or **eWIC card** at WIC authorized stores to pay for the food.

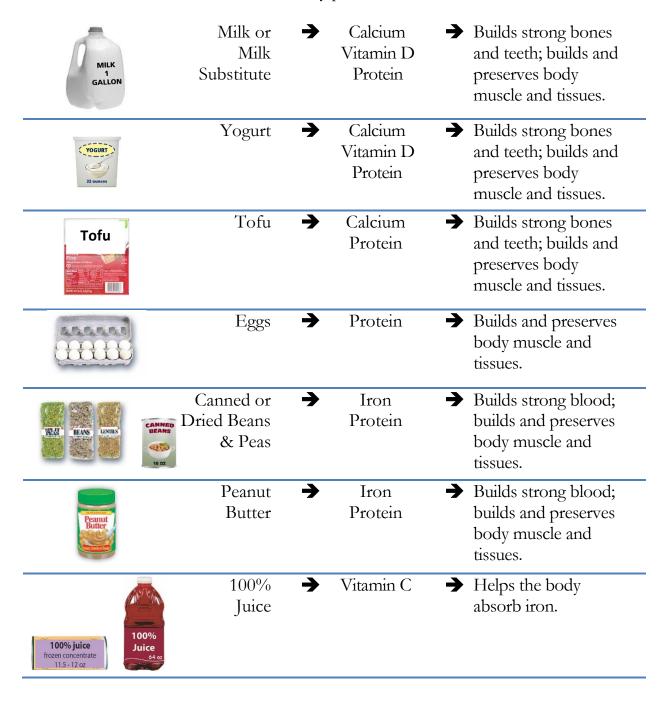
What Foods Does WIC Provide?

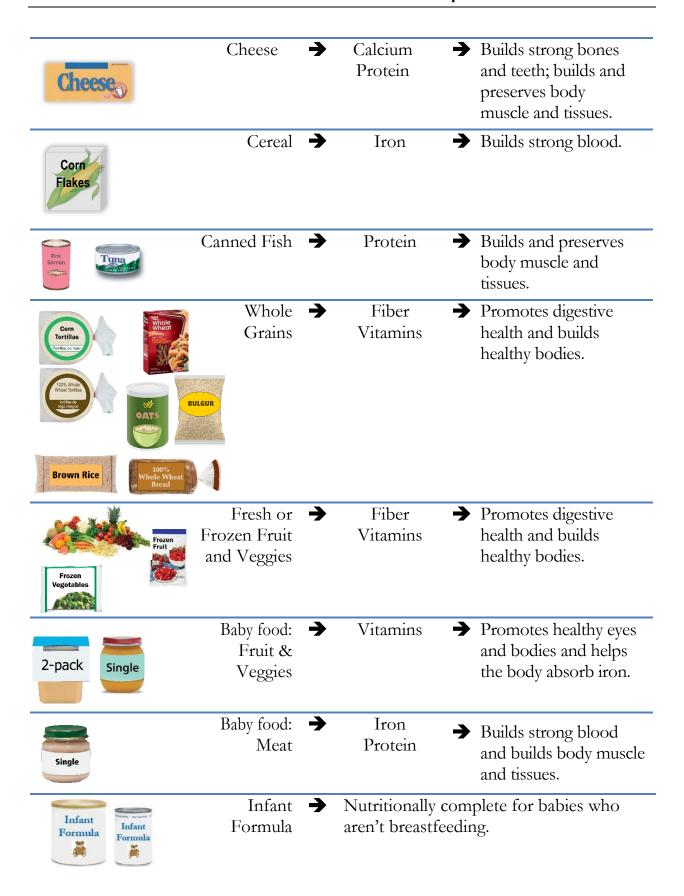
The USDA provides regulations for all states on the **food categories** and specific food products WIC can provide. The Oregon state WIC office uses these criteria to select the foods for our authorized **Food List**. The authorized foods are nutritious and help improve the diets of WIC participants.

WIC provides foods that are high in specific vitamins and minerals. WIC foods are only meant to supplement the diet, not provide all the food and nutrients that participants need.

WIC Foods

These are the food categories offered to WIC participants and some of the health benefits they provide:





What is a WIC Food Package?

A **food package** is the combination of foods that WIC participants receive based upon their nutrition needs. A variety of food packages are available for different categories of participants. During certification, the CPA assigns the food package that will best meet the needs of the participant. The following sections describe the food categories that are usually included in food packages assigned to each category of participant.

Infants

WIC promotes breastfeeding as the healthiest food for babies. WIC provides breastfeeding counseling and support to help women continue to breastfeed. WIC can also offer breast pumps to women who need to return to work or school. WIC provides formula for non-breastfeeding and some breastfeeding infants. In their 7th month, infants are also offered infant foods. In their 9th month, half of the baby food fruit and vegetables



can be replaced with cash benefits for fresh fruit and vegetables. This is an option if the infant is developmentally ready and the parent is interested.

WIC maintains contracts with formula companies that requires us to provide specific brands of infant formulas. These are called the **bid formulas**. Infants who cannot tolerate the bid formulas can receive a different brand of formula with medical documentation from their health care provider.











NOTE

You can learn more about the WIC Food Package in the *Food Package Module*.



Children

Children are offered foods that help promote good growth and a healthy diet. These foods include:



NOTE

Whole milk yogurt may be assigned to 13-23 month old children. Children 24-60 months receive lowfat/nonfat, yogurt in the standard food package.

Pregnant Women

Pregnant women are offered foods to help promote a healthy pregnancy. The food categories that pregnant women receive are the same as for children. Pregnant women receive a larger quantity than postpartum non-breastfeeding or mostly breastfeeding women.









































Fully Breastfeeding Women

Women who are fully breastfeeding (not using formula) receive extra WIC foods to meet their increased nutrition needs. They receive more foods than pregnant or mostly breastfeeding women.





















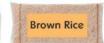




























Mostly Breastfeeding Women

A breastfeeding mother who is up to one year postpartum, whose infant receives a limited amount of infant formula from WIC, is considered **mostly breastfeeding**. Mostly breastfeeding women receive the same foods and quantities as pregnant women.

Some Breastfeeding Women

A breastfeeding woman who is up to one year postpartum, and whose infant receives a significant amount of formula from WIC, is



considered **some breastfeeding**. Some breastfeeding women are certified to participate in the WIC program for one year, but women in this category are only able to receive food packages until 6 months postpartum. From 6 months to 1 year postpartum, women in this category can participate in all other WIC services, such as nutrition education and the Farm Direct Nutrition Program. Some breastfeeding women get fewer types of foods and smaller quantities than pregnant women.



Non-Breastfeeding Postpartum Women

A woman through 6 months postpartum, whose infant receives the maximum amount of formula from WIC, is considered **non-breastfeeding**. This category of participant receives the same foods and quantities as some breastfeeding women.

Alternative Food Needs

Food packages can be issued which meet the unique needs of certain participants. The certifier assigns a non-standard package after assessing the participant's nutrition needs. Some of these food packages may include:

- ◆ Lactose-free milk
- ◆ Goat milk
- ◆ Soy beverage
- Powdered or evaporated milk.
- ◆ Tofu



The WIC Food List

To help participants shop at the store, WIC provides each person with a WIC *Food List* which describes what foods are authorized to be purchased with their eWIC card. The foods on the WIC *Food List* were chosen by a team from the state WIC office. They made the choices based on several factors, some of which include:

- ◆ All foods must meet the USDA guidelines for nutrition content.
- Cereals must be high in iron and low in sugar.
- ◆ Juices must be 100% juice and be high in vitamin C.
- ◆ Foods must be low cost to allow WIC to serve more participants.
- Results of local WIC staff input and participant preference surveys.
- Milk substitutes must have enough calcium and other vitamins and minerals.

Practice Activity

Using the WIC Food List, answer the following questions:

- 1. Can participants buy apple cinnamon flavored instant oatmeal packets?
- 2. What size eggs can participants buy?
- 3. Can participants buy Honey Nut Cheerios?
- 4. Can participants buy chocolate milk?
- 5. Can participants buy pepper-jack cheese?
- 6. Can participants buy goat milk?
- 7. Do participants have to buy juice with added calcium?
- 8. Can participants buy organic baby carrots?

Oregon WIC Farm Direct Nutrition Program (FDNP)

Some WIC participants also receive special checks to purchase fresh Oregon-grown fruits, vegetables and herbs at authorized farmers markets and farm stands in Oregon during the growing season (June-October). These families also receive information on how to



prepare fresh produce. The checks and information are provided by WIC staff. The program is funded through the USDA's Oregon WIC Farm Direct Nutrition Program (FDNP), also called the Farmers Market program.

Practice Activity

Ask your supervisor or Training Supervisor about how your clinic delivers the Oregon WIC Farm Direct Nutrition Program to WIC participants.

$oldsymbol{arDelta}$ Skill Check – Self-Evaluation

- 1. Pretend you are talking to a new WIC participant.
 - ◆ Explore what the participant knows about the approved WIC foods.
 - ◆ Ask permission to offer additional information about each WIC food.
 - ♦ Explore what the participant knows about the Farm Direct Nutrition Program.

- ◆ Ask permission to offer additional information about the Farm Direct Nutrition Program.
- ◆ You can practice aloud to yourself or with a friend or coworker.

NOTE

When you are finished, file the WIC Food List in your WIC Notebook.

2-4 Referrals to Health and Social Services

Items Needed

◆ Job Aid: Referrals (located in the Job Aids section in the back of the module).

WIC Policies

- ◆ <u>WIC Policy 481</u> *Immunization Screening and Referral Protocol*
- ◆ <u>WIC Policy 880</u> Referrals: Alcohol, Tobacco and Other Drug Use
- ◆ <u>WIC Policy 885</u> Other Referrals: Required and Recommended

Objectives

After completing this lesson, you will be able to:

- Describe your role in referring WIC participants.
- List the three required referrals for WIC.
- Identify at least two health or social service agencies that your program commonly refers participants to.
- Describe the importance of community partnerships and how to access their services.

The Importance of Referring

Connecting families with other services is the fourth primary pillar of WIC. Many families come to WIC with needs beyond nutrition education, breastfeeding support and supplemental foods. It is our job to link participants with resources outside of WIC so they can

be healthy and safe. Offering meaningful and appropriate referrals at the right time can help families get the support they need to be healthy.

Your Role in Referring

In order to effectively refer WIC participants to outside programs, you will need to know what health and social services are available in your area. Listed below are a few examples.

Health Care Service Referrals:

- Prenatal care or well child care
- Family planning or community health nurses
- Oregon Health Plan (OHP)/Medicaid
- Lactation Consultants
- Drug and alcohol counseling
- Smoking cessation counseling
- Mental health clinics

Social Service Program Referrals:

- Supplemental Nutrition Assistance Program (SNAP), formerly known as food stamps
- Head Start
- Food banks
- Emergency shelters and housing
- ◆ Temporary Assistance for Needy Families (TANF)
- Domestic violence programs
- Parenting classes
- Teen parent program



SMOKE**free**





Everyone plays a part when it comes to referring WIC participants to outside resources. Clerical staff may make referrals to OHP, SNAP, and/or TANF when enrolling participants. Certifiers will make unique referrals based on the need(s) that arise during the conversation with the participant.



Listed below are examples of what participants may say and what could be a possible referral:

WIC Participant Says:	Possible Referral:
"We got evicted and have no place to go"	Housing resources
"We run out of food every month. WIC and food stamps are just not enough."	Emergency food bank
"I know we should get his teeth checked, but we don't have a dentist."	Dental clinic
"We just moved to Oregon and have no health insurance."	Oregon Health Plan
"I just found out I am pregnant, now what should I do?"	Prenatal care/ Oregon Mothers Care
"I'm having trouble paying for child care."	Head Start/Department of Human Services - Day Care Assistance
"Sometimes he gets angry and pushes me."	Domestic violence
"I know I shouldn't smoke, but I just can't seem to quit."	Smoking cessation/Quit line
"I don't have time during the day to apply for food assistance."	Supplemental Nutrition Assistance Program (SNAP) online

Note

Accepting referral information may not be easy for some participants, as there may be feelings of embarrassment or shame about receiving help. Being sensitive to this and **asking permission before offering referral information** will go a long way towards making WIC participants feel comfortable.

Required Referrals for WIC

All WIC staff are encouraged to make referrals to health and social services, however three referrals are required:

1. Oregon Health Plan (OHP)/Medicaid

WIC staff are required to provide *written* OHP information at certification appointments *if* participants are not currently enrolled. Written information could include the OHP customer service phone number, a **211 Info** referral card with OHP written on it, or a locally developed OHP information sheet.

2. Immunizations

WIC staff are required to screen and refer WIC infants and children between 3 and 24 months, who are behind on their shots, to a health care provider, or to the county immunization clinic.

3. Alcohol, Tobacco, and other Drug Use

Staff providing nutrition counseling for prenatal and postpartum participants shall screen for alcohol, tobacco and other drug use, refer for a further assessment when needed, and provide drug and other harmful substance abuse information.

Note

Policy 885 – Other Referrals: Required and Recommended, states that if any referal is given—by any staff member—it must be documented in the participant's TWIST record. Documentation can assist with participant follow-up and ensure that any referral information offered is consistent.



Community Partnerships

WIC strives to form partnerships with other community agencies. A community partnership is when two local organizations serve a similar group of people, or having a similar goal of working together to better serve the community. Partnerships enhance customer service, increase program participation and are an important step to fostering a healthy community.

There are many agencies that are WIC partners, including but not limited to:

- Head Start/preschools/day care centers
- ◆ Oregon State University Extension
- ◆ Department of Human Services (DHS) offices SNAP (food stamps), TANF, Oregon Health Plan
- Medical providers/rural health clinics/hospitals
- Other health department programs
- Grocery stores/pharmacies/farmers markets
- Food banks
- Housing assistance programs
- Breastfeeding and lactation consultants

Here are a few examples of WIC community partnerships:

- Hospital staff loaning WIC breast pumps to participants after delivery.
- New WIC participants getting certified outside of WIC at the hospital or local health clinic.
- Dental hygienist providing basic oral health services at the WIC clinic.
- ◆ WIC providing participant information to Head Start to make it easier for shared families to be enrolled in both programs.
- Collaborating with local farmers markets to promote use of Farm Direct checks.
- OSU Extension staff working with WIC staff to teach a nutrition education class.

- 1. What agencies does your clinic commonly refer participants to? Using the Job Aid: Referrals, fill in the information about these agencies. Your Training Supervisor can help you find the information you need. When you are finished, file the Job Aid in your WIC Notebook.
- 2. Ask your Training Supervisor about what written materials are used in your agency for referrals. Find out if your agency uses TWIST to track referral organizations.
- 3. Ask your Training Supervisor what referrals are appropriate for you to offer, depending on your role. If you are a certifier, discuss how and when referrals can be offered during the visit.

Skill Check – Self-Evaluation

- 1. Why is it important to refer WIC participants to outside services?
- 2. What are the three required referrals for WIC, if a need is identified?

3. List two health or social service agencies that your program commonly refers participants to?

Review Activity

With Your Training Supervisor

- 1. Discuss your questions about Chapter 2.
- 2. Review your notes and Job Aids from your WIC Notebook.
- 3. Additions to your WIC Notebook from Chapter 2 include:
 - ◆ Job Aid: *WIC Groups*.
 - ♦ Handout: WIC Food List.
 - ♦ Job Aid: Referrals.
- 4. Discuss the types of nutrition education offered at your agency. Arrange a time to observe a group session or to review any online or self-paced lessons offered by your agency.
- 5. Role-play with your Training Supervisor about how you would market the nutrition education offered at your agency.
- 6. Discuss the types of breastfeeding support offered at your agency.
- 7. Using the WIC *Food List*, role-play with your Training Supervisor about how you would talk with a new participant about the WIC approved foods.
- 8. Discuss the types of referrals your agency offers and what materials are used for those referrals. Discuss the community partnerships specific to your agency.
- 9. Role-play with your Training Supervisor about how you would refer a participant to one of these services and then document it in TWIST.

82	Review ■	With Your	Training	Supervisor	•	 	
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Chapter 3 WIC Certification



Contents

- 3–1 Overview of Certification
- 3–2 Proof of Identity, Residency and Income
- 3–3 Income Eligibility
- 3-4 Issuing and Using the eWIC Card

"I'm glad you take the time to help mothers out, very helpful when you are a first-time mother."

~Oregon WIC participant

"Very informative and helpful reminders on how to eat and get your children to eat."

 ${\sim}Oregon~WIC~participant$

3-1 Overview of Certification

Items Needed

- ♦ Handout: My Rights and Responsibilities.
- Participant Signature Form.
- ◆ Attachment: *Certification Checklist* (located in the Attachments section in the back of the module).
- ◆ Job Aid: *Overview of WIC Certification* (located in the Job Aids section in the back of the module).

WIC Policies

- ♦ <u>WIC Policy 620</u> Certification and Issuing Benefits to Co-Workers, Relatives and Friends
- ♦ <u>WIC Policy 645</u> Certification Periods
- ◆ <u>WIC Policy 646</u> Mid-Certification Health Assessment.
- ♦ <u>WIC Policy 595</u> Program Inhtegrity: Seperation of Duties

Objectives

After completing this lesson, you will be able to:

- ♦ List the different types of appointments WIC offers.
- ♦ Describe applicant prescreening.
- ♦ Describe what happens during a certification appointment.

- Describe what happens during a nutrition education appointment.
- Describe what happens during a recertification appointment.
- State the certification periods for each category of participant.

Overview

What is certification? **Certification** is the process of determining whether or not a person qualifies for WIC services. WIC is different than other social service programs because a person must have a nutrition need to qualify for WIC.

- ◆ The CPA must complete the certification, although other staff members may help collect the information.
- ◆ WIC's computer program, TWIST, is used to collect and store information about participants.
- ◆ The participant comes to the WIC office in person for the certification appointment.

NOTE

During this lesson, follow along with your Job Aid: Overview of WIC Certification.

Applicant Prescreening

Applicant prescreening is used when a family calls and is interested in applying for WIC. Prescreening occurs before the certification appointment. The WIC clerk usually handles the applicant prescreening. This is what happens during applicant prescreening.



- 1. Participant calls and asks if her family is eligible for WIC.
- 2. The family is screened for eligibility.
 - ♦ Do they live in the area served by your clinic?
 - ◆ Are they in a category served by WIC?
 - Pregnant woman.
 - Breastfeeding woman with an infant under 12 months.
 - Postpartum woman through 6 months after delivery.
 - Infant under 12 months.
 - Child age 1 through their 5th birthday.
 - ♦ Does their income fall within the WIC Income Guidelines?
- 3. If the family meets the criteria for residency, category and income eligibility, they are scheduled for a certification appointment. The WIC clerk tells them what information they need to bring to their appointment.
- 4. If the family does NOT meet the criteria for eligibility, they can be referred to other community resources.

NOTE

You will learn more about determining eligibility in Lessons 3-2: *Proof of Identity*, Residency and Income, and 3-3: Income Eligibility.

Certification Appointment

Although other staff may help collect the information used during the certification, a CPA (Competent Professional Authority) must review the information and determine if the person is eligible or ineligible.

This is an example of the steps that would be taken during the certification appointment of Sylvia, a pregnant woman who is applying for WIC.

1. Sylvia checks in with the WIC clerk upon arriving for her appointment.

- 2. WIC staff complete the **WIC** intake process by collecting Sylvia's proof of identity, residency and income.
- 3. Sylvia is offered the opportunity to **register to vote** by asking, "If you are not registered to vote where you live now, would you like to register here today?"
- 4. WIC staff reviews the handout *My Rights and Responsibilities* with Sylvia and she signs the *Participant Signature Form*, indicating consent for services, release of information and the offer of voter registration.
- 5. WIC staff collect Sylvia's medical data.
 - Anthropometric data includes Sylvia's height and weight.
 - Hematologic information includes a test of the blood for anemia. This test is called a hemoglobin or hematocrit. Most clinics do the blood test themselves with a finger-stick blood sample.
- 6. The CPA conducts a **nutrition risk assessment**, engaging Sylvia in a conversation about her health, diet, and past/current medical conditions.
 - Sylvia's health information is assessed for medical risk factors.
 - Sylvia's diet information is assessed for dietary risk factors.
 - ◆ The CPA **documents** any risk factors in TWIST.



- 7. The CPA and Sylvia work together on a **nutrition education plan**. (This is Sylvia's first nutrition education contact.)
 - The CPA asks Sylvia to identify areas of interest or concern.
 - They talk about Sylvia's health interests/concerns.
 - The CPA offers Sylvia brestfeeding support.
 - They work together to establish "next steps" for Sylvia.
- 8. The CPA **summarizes** the reasons Sylvia is being enrolled on the program and connects program eligibility to improved health outcomes.
- 9. The CPA assigns Sylvia a **food package** (WIC foods she will receive). The food package is based on Sylvia's category and nutrition needs.
- 10. Sylvia is scheduled to return for her **second nutrition** education contact.
- 11. Sylvia is given **referrals** to community resources, if needed.
- 12. Sylvia is given her **eWIC card**, a **Food List**, and is issued her first **food benefits**, with information about how to use them.

NOTE

To maintain program integrity, two staff people must be involved in determining WIC eligibility and food benefit issuance. These duties are usually separated between the CPA and the clerk (see Policy 595).

WIC Certification Periods

When a person is eligible for WIC, they are certified for only a short period of time (usually 1 year). This time is called their **certification period**. At the end of their certification period, they may be eligible to be recertified for more time on WIC. The length of time a person is certified by WIC is mandated by federal government rules.



In general, the certification periods are:

Pregnant woman	From first enrollment appointment to 6 weeks following delivery, then may be recertified as a breastfeeding or non-breastfeeding woman.
Breastfeeding woman	From certification appointment following delivery until baby's first birthday.
Non-breastfeeding postpartum women	From certification appointment following delivery through 6 months after delivery.
Infants under 6 months	From their first certification appointment until their first birthday.
Infants 7 months to 12 months	Certified for 6 months at a time
Children	Certified for 1 year at a time , then may be recertified for another year for as long as they are eligible. Eligibility automatically ends at the end of the month in which the child turns 5 years old.

NOTE

See WIC Policy 645 – *Certification Periods* for more information.

WIC Category Abbreviations		
Abbreviation	WIC Category Description	
WP	Woman, pregnant	
WE	Woman, fully breastfeeding	
WB	Woman, mostly or some breastfeeding	
WN	Woman, non-breastfeeding	
IE	Infant, fully breastfeeding	
IB	Infant, mostly or some breastfeeding	
IN	Infant, non-breastfeeding	
С	Child	

Quarterly Nutrition Education Contact

WIC participants receive nutrition education at their enrollment and recertification appointments. They are also offered additional nutrition education during their certification period. This additional education is called the **quarterly nutrition education contact**. Participants will receive nutrition education contacts every 3 months during a certification period.

Participants may receive their quarterly nutrition education contact as an **individual follow-up appointment** (one-on-one counseling), **mid-certification health assessment**, or as **group education**. There are also alternative options like **self-paced lessons** and **online nutrition education** for certain categories of participants. All nutrition education contacts are documented in the participant's record.

High-Risk Participants

At WIC, participants with serious health or diet problems are called "**high-risk**." These participants are required to see the WIC nutritionist to plan for their special nutrition needs. High-risk participants are usually scheduled for individual follow-up appointments with the WIC nutritionist and not for group education.

Individual Follow-Up or Mid-Cert Health Assessment

At the individual follow-up or mid-certification health assessment appointment, the CPA or nutritionist talks with the participant to find out how s/he has been doing since the last WIC appointment.

During the individual follow-up, the CPA or nutritionist:

- 1. Reviews the summary of the participant's last visit to WIC.
- 2. May collect more **medical data** (weight, blood measurement).
- 3. Updates the participant's **risk factors**, if needed.
- 4. Provides participant-centered nutrition education.
- 5. Updates the participant's "Next Steps."
- 6. Documents the nutrition education provided.

Group Education

Group education is generally for low-risk participants, but is available to everyone.

- ◆ A variety of groups are available at most clinics to meet the needs of many different types of WIC participants.
- Groups may be offered at numerous times.
- Groups may be offered in English and other languages.



Recertification

When the participant's initial certification period is finished, s/he must be recertified to continue to participate in WIC.

Recertification is similar to the initial certification appointment. The participant goes through the same processes, but because much of the information has already been collected and is stored in the computer, it just needs to be updated.

NOTE

You may not certify or issue food benefits to your own relatives. For more information, see WIC Policy 620 – Certification and Issuing Benefits to Relatives, Friends, and Co-Workers.

Practice Activity

- 1. Review the following items and highlight or underline important information, including voter registration.
 - ♦ Handout: My Rights and Responsibilities.
 - ♦ Participant Signature Form.
- 2. Ask your Training Supervisor to show you where signed Participant Signature Forms are filed.
- 3. Observe a variety of appointments from start to finish. Use the Attachment: Certification Checklist to take notes on the appointments. Your Training Supervisor can help arrange your observations. You should observe the following types of appointments:
 - ◆ Applicant Prescreening (if needed, observe a clerk screening people on the phone.)
 - ♦ Certification Pregnant Woman.
 - ◆ Certification Breastfeeding Woman.
 - ♦ Certification Infant.
 - ◆ Certification Child.
 - ♦ Recertification Child.
 - Individual Follow-Up (Nutrition Education).
 - Group Education (Nutrition Education).
 - Breastfeeding for Pregnant Women (Nutrition Education).



NOTE

When you are finished, file the handouts and Job Aids in your WIC Notebook.

✓ Skill Check – Self-Evaluation

1. What are the types of appointments that WIC participants are scheduled for?



2. What is the purpose of the certification and recertification appointments?



3. What is the purpose of prescreening?



4. How often do participants receive nutrition education?



3-2 Proof of Identity, Residency and Income

Items Needed

♦ Handout: *What Proof to Bring to WIC*

♦ Handout: *No Proof Form*

WIC Policies

♦ <u>WIC Policy 610</u> — Required Proofs - Identity, Residence and Income

Objectives

After completing this lesson, you will be able to:

♦ Describe the three "proofs" participants are required to bring to certification appointments.

Overview

For each WIC certification appointment (new enrollment and recertification), participants are asked to bring proof of identity, residency and income. These are used during the evaluation of the participant's eligibility.

In some clinics, the clerks are responsible for collecting the information on identity, residency and income. In other clinics, the CPA collects and evaluates this information. In all clinics, the CPA evaluates nutrition risk.

Verifying Identity

Each time a person is certified for WIC, they must show **proof of identity** (ID). Ask to see their proof of identity at their first certification and at each recertification appointment. This rule is set by the federal government to help prevent fraud.



NOTE

You must confirm a participant's identity when they are being issued food benefits. You ask them their **name**, **date of birth** and **zip code**, to verify it against the information in TWIST.

Practice Activity

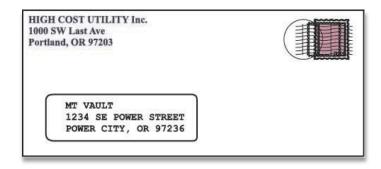
- 1. For more information about proof of identity, read WIC Policy 610 Required Proofs Identity, Residence and Income.
- 2. Read the "Proof of Identity" section of the What *Proof to Bring to WIC* handout.
 - ♦ List three acceptable forms of ID for women.



♦ List three acceptable forms of ID for infants/children.



Verifying Residency



Each time a person is certified for WIC, they must also show proof of residency. Ask to see a document that shows their name and address. Proof of residency will show that the person actually lives in Oregon. This rule is set by the federal government to help prevent people from receiving WIC benefits at more than one WIC office.

If a person lives in Oregon, but outside of your clinic's service area, tell them about the local WIC agency that normally serves that area. The Oregon WIC website has a complete list of WIC programs, local agency phone numbers, and a searchable map.

Sometimes a participant may want to come to your clinic even though their home is in another clinic's service area. They may work or have childcare near your clinic, or your clinic may have staff who speak their native/primary language. If the participant lives in Oregon, you may enroll them in your clinic. We want to provide the best customer service to the participant and reduce any barriers to them being able to participate in the WIC program.

NOTE

Residency refers to where the person normally sleeps at night. It is not the same as proof of citizenship. **WIC does NOT require proof of US citizenship.**

⇒ Practice Activity

- 1. For more information about proof of residency, read WIC Policy 610 Required Proofs Identity, Residence and Income.
- 2. Read the "Proof of Residency" section of the What Proof to Bring to WIC handout.
 - ♦ List three acceptable forms of proof of residency.



3. Talk to your supervisor about which other WIC programs are nearby that may serve participants from your service area.

Verifying Income

Each time a person is certified for WIC, they must show **proof of income**. This will determine if their household income falls within the *WIC Income Guidelines*.



NOTE

For specific information on how to determine income eligibility, see the *Income Eligibility* lesson.

Practice Activity

- 1. Read the "Proof of Income" section of the *What Proof to Bring to WIC* handout.
- 2. List three acceptable forms of proof of income.



No Proof

If a person does not bring proof of identify, residency or income to the WIC appointment, they can be certified on that day and asked to bring the proof within 30 days. They would need to complete a "No Proof" form 57-633 declaring that they have proof and then asked to bring it in within that time frame. If they do not bring the proof within 30 days, they will be terminated (removed) from WIC. Be sure to let them know what proof they need to bring and when they need to come back. You can offer them *What Proof to Bring to WIC* handout *Form 57-632*.

If a person cannot provide proof of identity, residency or income due to special circumstances (such as theft, disaster, homelessness or migrant status) they can fill out and sign the *No Proof Form*.

Practice Activity

- 1. Ask your Training Supervisor where to find a blank *No Proof* Form and where completed forms are filed.
- 2. Observe another staff person completing a *No Proof* form for someone with eligibility pending.

✓ Skill Check – Self-Evaluation

1. Using the *What Proof to Bring to WTC* handout, practice what you would tell a participant about what "proofs" they need to bring to their certification appointment. You may practice aloud to yourself or with a friend or coworker.

NOTE

When you are finished, file the handouts in your WIC Notebook.

3-3 Income Eligibility

Items Needed

- ◆ Job Aid: *WIC Income* (located in the Job Aids section in the back of the module).
- ♦ Job Aid: Steps for Determining Income Eligibility

WIC Policies

- ♦ WIC Policy 451 Change in Guardianship
- ♦ <u>WIC Policy 611</u> Income Eligibility: Determining Income Eligibility
- ♦ <u>WIC Policy 612</u> Income Eligibility: Adjunct or Automatic Income Eligibility
- ◆ <u>WIC Policy 613</u> Income Eligibility: What Counts as Income
- ♦ WIC Policy 614 Income Eligibility: Current Income Guidelines
- ♦ <u>WIC Policy 616</u> *Unavailable Proofs*
- ♦ <u>WIC Policy 653</u> Participant Transfers Into and Out of State
- ♦ <u>WIC Policy 654</u> Participant Transfers Within State

Objectives

After completing this lesson, you will be able to:

- ♦ Correctly screen for income eligibility.
- ◆ Identify whether a transfer participant is eligible for WIC.

Overview

Each time a person is certified for WIC, their income level is evaluated to determine if their household income falls within the WIC Income Guidelines. WIC income evaluation is assisted by TWIST. There are two ways to determine income eligibility: adjunctive eligibility and by calculating household income.

Adjunctive Eligibility

Adjunctive eligibility is a term used to describe "automatic" income eligibility based on income screening already completed by other assistance programs. The person must show proof of participation in one of the following programs:

- ♦ Medicaid/OHP (Oregon Health Plan).
- ◆ TANF Temporary Assistance for Needy Families (Welfare).
- ◆ SNAP (Supplemental Nutrition Assistance Program, also known as Food Stamps).
- ♦ FDPIR (Food Distribution Program on Indian Reservations).

The proof of participation must show that they are eligible for the other program **during the current month**. An Oregon Trail Card alone (Electronic Benefits Card from Food Stamps) cannot be used as proof because it does not show current eligibility. However, if we look up Oregon Health Plan eligibility online through the MMIS provider Web portal, this acts as proof of adjunctive income eligibility.



Document the proof of income for adjunctive eligibility in TWIST. Participants who are adjunctively eligible will still need to state their monthly income for documentation in TWIST.

Talk with your Training Supervisor for more information about the MMIS provider Web portal.

NOTE

For more information on adjunctive eligibility, see WIC Policy 612 – *Income Eligibility: Adjunct or Automatic Income Eligibility.*

Practice Activity

1. Circle whether or not these people would be adjunctively eligible for WIC based on the information they bring to WIC.

Yes/No	Susie brings in her welfare letter showing her child received TANF this month.
Yes/No	2. Tatiana brings in her Oregon Trail Card.
Yes/No	3. Carlotta brings in her current Medicaid letter.
Yes/No	4. Georgina brings in her receipt from the Oregon Food Bank.

Calculating Household Income

If a family does not bring in proof that they are adjunctively eligible,

then you must calculate their total household income to determine eligibility.

WIC must verify all sources of income for the household. The household size and total income are compared to the *WIC Income Guidelines* to determine if the family is eligible for WIC.



Household

For WIC purposes, a household is defined as:

- ♦ A person or group of people, related or not, who usually (though not necessarily) live together and whose income and consumption of goods and services are related.
- For pregnant women, each fetus is counted as an additional household member.

Examples of Household Size

Sabrina lives alone in an apartment. She is pregnant with twins. She receives TANF and is on the Oregon Health Plan. Sabrina's household size would be counted as three (3).

Josefina lives with her boyfriend. They have a 2 month-old baby who lives with them. Josefina receives TANF payments and her boyfriend works part-time. They cook their meals together and shop together. Josefina's household size would be counted as three (3).

Candi has a 3-year old son and lives with a roommate. She works and so does her roommate. She and her roommate split the bills evenly and each pays half. Candi and her son buy their food separately and eat separately from the roommate. Candi's household size would be counted as two (2).

Income

For WIC purposes, include the income of all household members. Generally, the type of proof of income used for calculating income includes:

- ♦ Current pay stubs.
- Unemployment benefits stub.
- ♦ W-2 forms or income tax return.
- ♦ Foster child/parent placement letter.
- Signed letter from employer stating gross earnings.
- Benefits or earnings statements.
- ♦ Letter of alimony or child support payments.

Income information is entered on the "Income Eligibility" screen in TWIST. Because not all families are paid one time per month, you can enter the time period of their payment in the interval field. TWIST then calculates if the income is within the allowable WIC income guidelines. You can also enter more than one source of income.

30 days of Income

You need to review approximately **30 days' worth of pay stubs**, regardless of the pay period. If they're paid:

- ♦ monthly = verify 1 pay stub
- every two weeks/twice a month = verify 2 pay stubs
- ◆ weekly = verify 4 pay stubs.

If the amounts differ, you can use the income average button.

Examples of Income Documentation

Gabby is paid \$300 once a week. In TWIST, \$300 is entered with a "weekly" interval. For a family of 2, this meets the weekly income guideline.

Jaime has three jobs. This is the information entered in TWIST:

\$100 -weekly.

\$200 - every 2 weeks.

\$500 - monthly.

TWIST calculates the annual income to be \$17,700 per year.

100 per week = 5,200 per year

\$250 every 2 weeks = \$6,500 per year

\$500 monthly = \$6,000 per year

Total.....\$17,700

NOTE

For detailed information on calculating income, including unusual cases, see:

WIC Policy 611 – Income Eligibility: Determining Income Eligibility.

WIC Policy 613 – Income Eligibility: What Counts as Income?

WIC Income Guidelines

Each year, the federal government updates the federal poverty guidelines which are used to determine eligibility in many assistance programs. WIC uses the federal poverty guidelines to determine our WIC Income Guidelines. The WIC Income Guidelines are set above the federal poverty guidelines at 185% of the federal level. If a family's income falls below the levels on the WIC Income Guidelines, they would have an income that qualifies them for WIC (they would still need to be determined to be eligible based on category and nutrition need).

The most current version of the guidelines can be found in WIC Policy 614 – *Income Eligibility: Current Income Guidelines* and on the WIC website at: www.healthoregon.org/wic > <u>Income guidelines</u>.

Practice Activity

- 1. Find a copy of the current WIC Income Guidelines. Make a copy for your WIC Notebook.
- 2. Read the Job Aid: WIC Income.
- 3. Using the WIC Income Guidelines and your Job Aid: WIC Income, answer the questions about each scenario.

Scenario 1 Maria lives with her husband who gets paid \$500 once a month. They have two children.

♦ What is their household size?



♦ What is their monthly income?



◆ Is Maria income eligible for WIC?



Scenario 2 Chaandra is pregnant with twins. She lives with her boyfriend and a roommate. The roommate doesn't have a job and Chaandra and her boyfriend are paying for his food. Chaandra makes \$200 a week, and her boyfriend makes \$1000 a month.



What is their household size?



What is their annual income?





Is Chaandra income eligible for WIC?

Scenario 3 Justin is at WIC to enroll his son. He has sole custody of his son. His ex-wife pays child support of \$700 a month. Justin also receives \$400 a month in unemployment benefits. He and son live alone.



- ♦ What is their household size?
- ♦ What is their monthly income?



◆ Is Justin's son income eligible for WIC?



NOTE

File your Job Aid and WIC Income Guidelines in your WIC Notebook.

Special Circumstances

In some cases, income calculation is different than usual.

Foster Children

Foster children are counted as a household size of one (1). Use only the payment the foster family receives for their care as the income.

Teen Mothers

Pregnant teens and teen mothers who live with their parents should be counted as their own household only when they have sufficient income to support themselves (paying rent, buying food, etc.). Otherwise, the household income should be counted, including the parents.

Transfers

A WIC participant can transfer their certification to another county or state if they move. Participants transferring from another state should arrive with a **Verification of Certification (VOC)** form or card. Participants transferring within Oregon do not need a VOC form. You can look up their certification information on TWIST. If a transferring participant's certification period has not ended, they are eligible for WIC services at your clinic. You do not need to rescreen their income eligibility. They will need to show current proof of residency for your clinic's service area.

NOTE

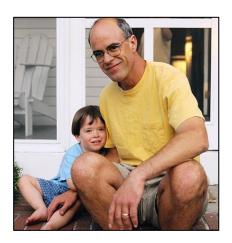
For more information about transfers, see:

- ♦ WIC Policy 653 Participant Transfers Into and Out of State
- ♦ WIC Policy 654 Participant Transfers Within State.

Split or Joint Custody

When the custody of a child is split, the child shall be considered a member of the household in which he or she lives the majority of the time.

If the parents share custody 50/50, the child can only qualify for WIC in one parent's household.



NOTE

Talk to your coordinator if you have questions about special circumstances or see:

- ♦ Policy 611 Income Eligibility: Determining Income Eligibility
- ♦ Policy 451 Change in Guardianship.

⇔ Practice Activity

- 1. Observe a coworker checking a participant's income eligibility.
 - ◆ Follow the process using the Job Aid: *Steps for Determining Income Eligibility*.
 - ♦ Observe 5 10 interactions.
 - ◆ Your Training Supervisor can help you schedule your observations.
- 2. Use the Job Aid: Steps for Determining Income Eligibility and the WIC Requires Proof handout to help answer the questions about the following scenario.

Scenario Alexander Smith is 2 years old and is at WIC for his first certification appointment. He lives with his mom, Jacqueline, in an apartment. Jacqueline receives a \$500 per month TANF payment.

She brings with her to the appointment:

- ♦ Her Oregon driver's license.
- ♦ Alexander's birth certificate.
- ♦ A letter stating her TANF grant.
- An electricity bill with her name and address on it.
- ♦ Would you calculate the income for a "family" or "client?"



• What is Alexander's proof of ID and residency?



♦ What is Alexander's household size?



◆ Is Alexander adjunctively eligible?



♦ What is Alexander's income?



♦ What would you enter for Alexander's proof of income?



♦ Does Alexander need to bring back proof later?



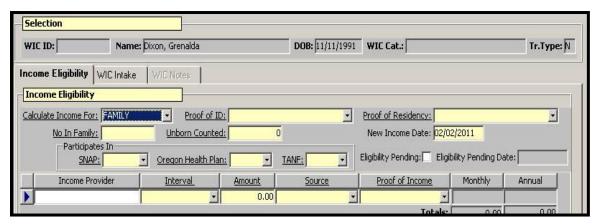
arDelta Skill Check – Self Evaluation

1. Fill in the empty white fields on the TWIST "Income Eligibility" screen (below) using the information from the scenario. If needed, use the Job Aid: *Steps for Determining Income Eligibility* and the *WIC Requires Proof* handout to guide you.

Scenario Grenalda Dixon is pregnant with twins and is applying for WIC. She and her husband are the only ones living in their apartment. She brings with her to the appointment:

- ♦ Her husband's pay stub for \$275 every week.
- ♦ A bill with her name and address.





NOTE

Remember to file the Job Aid and Handout in your WIC Notebook.

3-4 Issuing and Using the eWIC Card

Items Needed

- ♦ Job Aid: Compare First and Second Cardholders
- ♦ Job Aid: Helping Families Use the Benefits List
- ♦ Attachment: What Successful Shoppers Need to Know
- ♦ Handout: <u>WIC Food List</u>
- ♦ Handout: *Shopping With Your eWIC Card*
- ♦ Handout: <u>Using Your Oregon eWIC Card</u>
- ◆ Participant videos: <u>How to Shop with Your eWIC Card</u>
 - Setting Your PIN
 - Shopping with Your eWIC Card
 - Checking Your Food Balance
 - Protecting Your eWIC card

WIC Policy

- ♦ WIC Policy 510 eWIC Cardholder Requirements
- ♦ <u>WIC Policy 511</u> Food Benefit Issuance
- ♦ <u>WIC Policy 561</u> Program Integrity: Replacement of Food Benefits
- ♦ <u>WIC Policy 635</u> Participant Notification, Eligibility, Rights and Responsibilities

TWIST Training Manual lessons

- ◆ Chapter 3, Lesson 1103 *Family Cardholder Screen*
- ♦ Chapter 3, Lesson 1101 <u>Food Benefits List</u>

Objectives

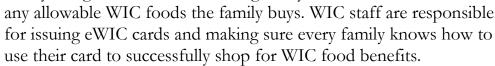
After completing this lesson, you will be able to:

- Explain the roles of the first and second eWIC cardholder.
- Explain to a WIC cardholder how to shop with their eWIC card.
- Describe the situations where spent formula benefits can be replaced.

Overview

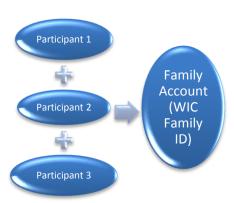
Oregon WIC participants get their food benefits by using a special

kind of debit card called an electronic benefits transfer (EBT) or eWIC card to pay for WIC foods they buy at a grocery store. WIC's banking contractor keeps track of what foods each WIC family can get and reimburses the grocery store for



It starts with an "account"

Getting an eWIC card is a lot like getting a debit card for your checking account. Before you can get a card, you have to set up an account with the bank and deposit money. In WIC, the TWIST data system will automatically set up an account for each WIC family with Oregon's banking contractor. The account number is the same as the family WIC ID number.



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Instead of money in the account, WIC food benefits are put in the account each month. If there are multiple WIC participants in one family, all of their food benefits are in the same account.

Issuing an eWIC card

In the same way that a bank account holder needs to have a debit card to access the money in their bank account to pay for something at a store, a WIC family needs an eWIC card to purchase the WIC benefits available in their account. eWIC cards are issued by WIC staff to cardholders when a family member is enrolled in WIC.

Similar to a joint bank account, WIC families must be issued at least one card but have the option of being issued a second card to make shopping more convenient. Both cards will access the same account and the same set of WIC benefits. Separate information is gathered for each cardholder and each is issued their own unique eWIC card.

First and second cardholders have different requirements and roles. Review the Job Aid: *Compare First and Second Cardholders* and Policy 510 – *eWTC Cardholder Requirements* to learn more about the differences between cardholders.



Cardholders need to know:

- ◆ They use the eWIC card to shop for WIC benefits.
- ◆ The different roles of the first and second cardholders.
- ◆ The first cardholder is responsible for showing the second cardholder how to use the card.

 Both cardholders can access the benefits, so make sure they choose any second cardholder carefully.

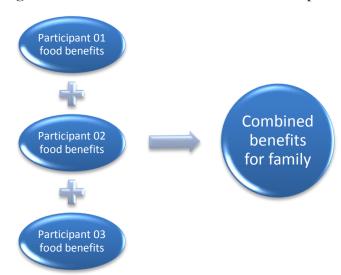
Practice Activity

- 1. Use the Job Aid: *Compare First and Second Cardholders* to answer the following questions.
 - ◆ When can the Second Cardholder be added?
 - ◆ Who can be the First Cardholder?
 - ◆ Where does the First Cardholder live?
 - ◆ When can a WIC staff person be a eWIC cardholder?
 - ◆ What appointments can a second cardholder bring a child to?
 - Which cardholder(s) can transfer a participant or discontinue WIC services?
 - ◆ Who can access eWIC account information?
 - 2. Observe a coworker issuing an eWIC card to a new cardholder.

Issuing benefits

Issuance of food benefits is coordinated with a participant's WIC appointments. Participants are issued food benefits after they are determined to be eligible for WIC at their first certification appointment. Participants can be issued up to three months worth of food benefits at a time, starting with the month of their certification appointment. After they complete their second nutrition education, they can be issued another three months worth of food benefits. Participants who need to be seen at the WIC clinic more frequently may be issued one or two months of food benefits at a time.

Foods for all the participants in a family will be combined by food category each month. For example, if multiple people in the family are issued cereal in a month, the ounces from each person will add together to show the total cereal available to purchase.



The Benefits List from TWIST will show cardholders what benefits are in their account. This list can be used as a sort of shopping list the first time they go to the store.

Cardholders need to know:

- How many months of benefits are being issued
- ◆ How much of each food category they are being issued
- ◆ The current month of benefits is the only one available for use
- ◆ Unused benefits do not roll over to the next month
- ◆ Benefits are available at 12:01 a.m. on the first date to use and expire at 11:59 on the last date.

⇒ Practice Activity

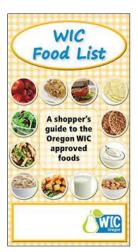
Use the Job Aid: Helping Families Use Their Benefits List to answer the following questions.

- 1. What months have benefits been issued for?
- 2. What are the first date to use and last date to use for the first month of benefits?
- 3. What are the names and categories of the participants who have been issued benefits?

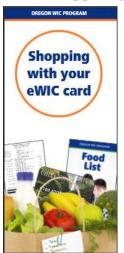
- 4. Who are the cardholders for this account?
- 5. How much cereal does this family receive?
- 6. When should this family have their next appointment?

Understanding what to buy

The Benefits List tells the cardholder what food categories have been issued and how much of each they get. The WIC Food List tells them what specific foods have been approved to purchase and what is allowed or not allowed from each food category. In some cases it will give sizes or specific brands. The Shopping with your eWIC card brochure will help explain the details of shopping. You will want to give these two brochures to every cardholder to use when they shop.



When shoppers get to the cashier, they will only be



able to use their eWIC card to purchase approved WIC foods which have specifically been issued to them. If when shopping, the item doesn't ring up as a WIC food, it could be they don't have the balance needed, or the food might not be on the list of WIC approved foods.

Example 1: The cardholder's Benefits List says they have 36 ounces of cereal. They bring a box of Cocoa Crisp to the check out stand. Their purchase would be denied because Cocoa Crisp is not a WIC approved cereal.

Example 2: The same cardholder brings up an 11 ounce box of Cheerios. Their purchase would be denied by the bank because the 11 ounce size is not approved.

Example 3: The cardholder brings up a package of cranberries. Their purchase is denied. This is a new or seasonal type of fresh fruit that hasn't been entered into the database of approved WIC foods. The cashier cannot override the denial, but could offer to send the product information to the State WIC office, to possibly get approved and added over the next week or so.

Some stores use WIC shelf tags to indicate which foods or brands are WIC authorized. These can help a new shopper find WIC foods. Unfortunately, they don't always stay in the right place, so they still need to check the *Food List* to be sure.



Review the WIC Food List and Shopping with your eWIC card brochure for more information on shopping.

Cardholders need to know:

- What specific foods are allowed or not allowed for the food categories they have been issued.
- ◆ How to use the *Food List* to shop for WIC foods.
- Specifics about how foods can be purchased (e.g. some foods are by certain container sizes, others debited by the ounce or by portions of a gallon).

Practice Activity

Use the Job Aid: Helping Families Use the Benefits List, Shopping with your eWIC card brochure, and the WIC Food List to answer the following questions.

- 1. What is the difference between the milk issued for the first month and the second month?
- 2. How many and what size containers of 1% or fat free milk would need to be purchased, to use all of the milk benefit during the first month?
- 3. If they bought all 4 ounce jars of baby food, how many could they get each month?
- 4. How many and what size container of beans, peas or lentils could this family buy if they choose to get all dry legumes, and no peanut butter or canned beans?

5. Can this family buy apple cider with WIC?

Setting the PIN

In order to use the card, the cardholder must set a PIN. To do this they can either go to the cardholder website or call the customer service line. Both of these options are available 24/7.

Cardholders need to know:

- ◆ The customer service line number and cardholder website address are on the back of the eWIC card.
- ◆ The PIN needs to be something they can remember, but would be hard for someone else to guess. For example, they shouldn't select "1111" or "1234."
- ◆ If they don't have access to a phone or the internet, they can use a phone or computer in your office for the initial PIN set.
- ◆ You may offer to help cardholders navigate the PIN set process, but be sure to let them enter their actual PIN privately.
- ◆ They will need the cardholder information (cardholder date of birth, and zip) they gave us (in TWIST) to answer security questions when they activate their card.

Note

- ◆ When using customer service in **English**, date of birth is entered: month, day, year: 01/31/1990
- When using customer service in Spanish, date of birth is entered: day, month, year: 31/01/1990

Practice Activity

Watch the participant video *Setting your PIN* and review the *Using your Oregon eWIC card* brochure. Use the information to answer the following questions.

- 1. What two ways can you set your PIN for the first time?
- 2. How do you change your PIN?

Shopping with the eWIC card



There are a lot of things to think about and remember when you shop for WIC foods. It can be a little bit intimidating the first time a new WIC cardholder goes shopping. They have to think about which foods they were issued, which brands are okay to buy,

and what size containers they can get. And that is before they even get to the checkstand! The *Shopping with your eWIC card* brochure and video will help cardholders learn to shop successfully.

The WIC staff works with cardholders to ensure they know how to use their eWIC card correctly and how to successfully shop at the store.

Cardholders need to know:

- Only shop at WIC authorized stores.
- ◆ Know their benefit balance when they shop, so on their first shopping trip bring their Benefits List.
- ◆ Always take a copy of the WIC *Food List* with them when they shop.
- ◆ At the check stand, tell the cashier they are using their eWIC card.
- ◆ The first time they use eWIC at a store, ask if they need to separate their WIC foods from their other groceries, and when they should swipe the card and enter the PIN.
- Give the checker any coupons or store club cards.
- Use their eWIC card first before SNAP or other types of payment such as cash, debit, or credit.
- ◆ If fruit and veggie purchases exceed the eWIC balance, the cardholder can pay the extra with SNAP, cash, debit, etc.

- Make sure their WIC purchase is correct before using other forms of payment.
- Keep their receipt since it shows their remaining WIC food balance.
- ◆ They can shop as often as they want and can buy just what they need at the time. They will want to make sure they buy all their WIC foods by the end of the month.
- If an item the shopper wants to buy with WIC is denied, it could be because:
 - o it's not authorized
 - o it's the wrong size, or
 - o the family doesn't have adequate remaining balance to purchase it.
- There is nothing the cashier can do about this. If they weren't able to buy a food they think is WIC approved, they can call the clinic, but it will not change what can be immediately purchased.



Practice Activity

- 1. Watch the participant video *Shopping with your eWIC card* and review the *Shopping with your eWIC card* brochure. Use the information to answer the following questions.
 - ♦ What would you buy to get .75 gal of milk?
 - ♦ What foods are issued in a dollar amount?
- 2. Observe a coworker explaining the use of the eWIC card to a new WIC cardholder.

Benefit balance

One of the challenges of shopping for WIC food benefits is keeping track of how much a family still has available to purchase. The foods remaining to be purchased are called the benefit balance. If a family doesn't know that they have a remaining balance, they likely won't get and use all their WIC foods. Since we want families to get the full nutritional benefit from their WIC foods, it is important that

we make sure they know how to find out their current WIC food balance. While you can get this benefit balance information from TWIST, there are five faster and more efficient ways that a cardholder can do this for themselves.

Cardholders need to know:

- ◆ They can call the toll-free eWIC customer service line 24/7. They need to enter an eWIC card number in order to get their balance. They will hear a listing of the foods and amounts they have left for the month.
- ◆ They can go to the eWIC **cardholder website** and see the listing of what they have left for the month.
- ◆ They can use the free **WICShopper** smartphone app.
- ◆ They can look at the "Remaining Balance" section of their last eWIC **shopping receipt**. The remaining balance is printed on the receipt every time they shop.
- ◆ They can **ask a cashier** at the grocery store to print their remaining balance. They will need their eWIC card number and PIN to do this.

Practice Activity

Watch the *Checking Your Food Balance* participant video and use the sample reciepts in the *Shopping with your eWIC Card* brochure and answer the following questions about the remaining balance.



- 1. When is the last day they could buy the remaining foods?
- 2. How much cereal do they still have left?
- 3. How much juice can they still buy?

Keeping benefits, cards and PINs secure

Accessing WIC benefits requires both an active card and the PIN associated with that card. Keeping both safe is important. Losing a card is more an inconvenience than a problem since cards can be easily replaced and a card that is found can't be used without the PIN. Losing benefits is more likely to happen when someone has access to both the card and the PIN. This could happen in situations such as the cardholder loaning the card to someone or a domestic situation which impacts the second cardholder. This is the reason that the first cardholder needs to be either: the adult participant (e.g. the pregnant woman); or the parent or caretaker of the infant/child participant (who is also a memeber of the infant/child participant's household). It is also the reason that the first cardholder can remove the second cardholder's card at any time.

Review the *Protecting your eWIC card* participant video and the *Using Your Oregon eWIC Card* brochure for more information.

Cardholders need to know:

- Keep their eWIC card in a safe place.
- ◆ Do not write the PIN on the card or on paper that is kept near the card.
- ◆ Don't share the PIN with anyone.
- ◆ Report any lost cards immediately. Cardholders can do this 24/7 on the customer service line or the cardholder website, or by calling the WIC clinic during business hours.
- ◆ Lost cards can be replaced by mail when the cardholder calls customer service line. This may take 5-7 days. They can be replaced in person during business hours at the WIC clinic.

- Only ask people they trust to be the second cardholder or to shop for them.
- ◆ They can reset their PIN anytime by contacting the customer service line, or on the cardholder website.
- ◆ Let the WIC clinic know if they move or change address.

Practice Activity

Watch the *Protecting your eWIC card* participant video and use the *Using Your Oregon eWIC Card* brochure and answer the following questions.

- 1. What do you think is the most important information to cover with cardholders?
- 2. Who should the cardholder contact if they need to change their WIC food benefits?
- 3. What kinds of things can damage the card?

Practice Activity



Use the *Shopping with your eWIC card* brochure, *Using Your Oregon eWIC Card* brochure, and the WIC *Food List* to practice explaining how to shop to a coworker. Ask your coworker to provide you with feedback by asking them the following questions:

- 1. What, if anything, might I change next time?
- 2. What went well?
- 3. What do you think is the most important thing to emphasize?

How Does the Store Get Paid for the WIC Foods?

Stores (vendors) must be approved and trained by the state WIC office before they can accept eWIC cards as a form of payment. When a cardholder uses an eWIC card to shop, it is just like using a debit card.

- 1. The store's cash register or point of sale device connects to WIC's banking contractor.
- 2. The banking contractor tells the store if the food being purchased is authorized and available to the cardholder.



- 3. Once the purchase is approved, WIC's banking contractor transfers payment to the vendor.
- 4. WIC's banking contractor requests payment for all WIC purchases statewide each day.
- 5. TWIST gets real time information about purchases from the banking contractor, so WIC staff have accurate up-to-theminute information on the benefit balance for each participant.

⇒ Practice Activity

Go to the state WIC website (<u>www.healthoregon.org/wic</u>) and click the "Find a WIC clinic or authorized store near you" link. On the

"Find a WIC Clinic or Store" web page, find your agency's clinics and the stores and pharmacies serving your area.

- Bookmark this web page on your computer.
- ◆ Are the stores you shop in on the list?

Can Benefits Be Replaced?

Spent food benefits cannot be replaced under any circumstance. Formula benefits may be replaced only when:

- ◆ Formula is purchased that cannot be used by the participant the cardholder must bring in the unopened cans of incorrect formula to be exchanged.
- ◆ Formula is not available after a disaster such as a flood, earthquake or house fire.
- ◆ Formula is stolen must have a police report or report number.
- ◆ Change in guardianship occurs refer to *WIC Policy 451* for more information on changes in guardianship.
- WIC formula is in a location that compromises the safety of the cardholder (domestic violence) if they attempted to retrieve the formula.

NOTE

See WIC Policy 561 – Program Integrity: Replacement of Food Benefits for more information.

Practice Activity

Using Policy 561, find the Replacing Unavailable/Stolen Formula form and list the situations when it needs to be completed.



Skill Check – Self-Evaluation

- 1. Review the attachment *What Successful Shoppers Need to Know* and mark those items you feel comfortable explaining to cardholders.
- 2. On your next shopping trip, use the Helping Families Use the Benefits List handout, the How to Shop with your eWIC Card brochure and the WIC Food List and try to find the WIC foods you might purchase if you were on WIC.
- 3. Talk with your Training Supervisor about what you think is most important for cardholders to know before they go to the store.

NOTE

When you are finished, file the handouts in your WIC Notebook.

Review Activity

With Your Training Supervisor

- 1. Discuss your questions about Chapter 3.
- 2. Review your notes and Job Aids from your WIC Notebook. Additions to your WIC Notebook from Chapter 3 include:
 - ♦ Handout: My Rights and Responsibilities
 - ♦ Handout: Participant Signature Form
 - ♦ Attachment: *Certification Checklist*
 - ◆ Job Aid: Overview of WIC Certification
 - ♦ Handout: What Proof to Bring to WIC
 - ♦ Handout: No Proof Form
 - ♦ Job Aid: WIC Income
 - ♦ Job Aid: Steps for Determining Income Eligibility
 - ♦ Job Aid: Compare First and Second Cardholders
 - ◆ Job Aid: Helping Families Use the Benefit List
 - ♦ Handout: Using Your Oregon eWIC Card
 - ♦ Handout: Shopping with Your eWIC Card
 - ◆ Attachment: What Successful Shoppers Need to Know
- 3. Role-play with your Training Supervisor how you would screen a participant for eligibility (excluding nutrition risk).

- 4. Working together with your Training Supervisor or other assigned coworker, screen participants for eligibility (excluding nutrition risk), including verifying proof of residency, identity and income.
- 5. Arrange with your supervisor or Training Supervisor to watch several participants being issued eWIC cards for the first time. Observe how the WIC staff person explains how to use the their benefits. Discuss any questions about the process with your Training Supervisor.

Glossary	OREGON

Glossary

Anthropometric

Refers to measurements of the human body, e.g. height and weight.

Applicant Prescreening

The process of determining income, residency and category eligibility for WIC before scheduling a WIC appointment to determine nutrition risk.

Authorized Food List

Also called the *Food List*. The foods that have been approved by the state WIC office for participants to purchase (when they are included in their food package).

Authorized Stores

The stores that have been approved by the state WIC office to take eWIC cards.

ADD

Actual Delivery Date, or date of birth of the baby.

Bid Formula

The brand of formula for which WIC currently has a contract. This formula must be offered as the first choice for WIC formula-fed infants.

\mathbf{C}

Child.

Caseload

Number of participants WIC is serving each month.

Category

The types of people who are eligible for WIC, including pregnant women, breastfeeding women, postpartum women, and infants and children under 5 years of age.

Cert

A short way of saying certification.

Certification

The process of determining whether or not a person qualifies for WIC services.

Certification Period

The amount of time a person is certified to be on WIC. The length of the certification period varies based on a participant's category.

Certifier

Another name for a Competent Professional Authority.

Child

For the purposes of WIC certification, a person is considered a child from their first birthday through the end of the month in which they turn five years old.

Competent Professional Authority (CPA)

A WIC staff person who determines if people are eligible for WIC based on their nutrition risk factors.

EDD

Estimated Delivery Date, or due date of a pregnancy.

Electronic Benefits Account (EBA)

An account established for each WIC family. Accounts are identified by the WIC family ID number assigned to that family. Food benefits for all participants in the family are put into a single account.

Eligibility

Whether or not a person meets the criteria for WIC services.

eWIC card

Magnetic stripe card used to purchase WIC authorized foods or formulas from a WIC family's Electronic Benefit Account (EBA).

Farm Direct Nutrition Program (FDNP)

Also called the Farmers' Market program. A program which provides paper coupons to purchase fresh fruits and vegetables from authorized farmers' markets and farm stands.

Food Package

The specific foods that will be issued to a particular WIC participant.

Group Nutrition Education

Facilitated by a WIC staff person and is offered to multiple participants at once. A variety of group topics may be offered. Group education is offered in a participant centered way, where everyone can discuss topics and share questions and knowledge with the group.

Health Outcome-Based WIC Nutrition Assessment

A positive approach to assessment where a desirable health outcome serves as a focal point for collecting relevant information, rather than focusing on deficiencies.

Hematologic Information

Refers to measurements of blood components, e.g. blood tests for anemia and lead.

High-Risk

WIC participants with serious health or diet problems.

IB

Infant, breastfeeding, receiving some formula supplement.

IE

Infant, fully breastfeeding, no formula issued.

IN

Infant, non-breastfeeding.

Individual Follow-Up Appointment

WIC participants who need more in-depth nutrition counseling are scheduled for a one-on-one appointment, usually with the WIC Nutritionist.

Infant

For the purposes of WIC certification, a person less than 12 months old.

Local Agency

The main WIC office for your WIC clinic.

Nutrition Assistant

Another name for a Competent Professional Authority.

Nutrition Education (NE)

Teaching people how good nutrition can improve their health.

Nutrition Risk

A health problem, medical condition, diet deficiency or other issue which can compromise the health or growth of a WIC participant.

Paraprofessional CPA

A Competent Professional Authority who has at least a high school diploma and is trained by WIC to learn how to certify and counsel WIC participants.

Participant Centered Education (PCE)

Focuses on people's capacities, strengths and developmental needs – not solely on their problems, risks, or negative behaviors.

Permanent Clinic

A WIC clinic that is regularly staffed and which has equipment that stays on site.

Prescreening

See Applicant Prescreening.

Professional CPA

A person with a bachelor's or master's degree in a health field who certifies and counsels WIC participants. Usually a nurse, dietitian, nutritionist or health educator.

Public Health

Public health promotes and protects the health of people and the communities where they live, learn, work and play.

Recertification

The process of reassessing to determine if a person is still eligible for WIC.

Risk Factors

The codes/numbers used to document nutrition risk in TWIST.

Satellite Clinic

A WIC clinic that is temporarily set up in a location (with equipment brought just for the day).

Second Nutrition Education Contact

Nutrition education offered to participants during their certification period (between certification appointments).

Service Area

The geographical area served by a WIC clinic.

TWIST

The WIC Information System Tracker. This is the computer data system Oregon WIC uses to collect and store participant data.

USDA

The United States Department of Agriculture, the federal agency which funds WIC and sets the rules for the program.

Vendors

See Authorized Stores.

WIC

The Special Supplemental Nutrition Program for Women, Infants and Children.

WIC Clinic

Your local WIC office.

WB

Woman, mostly or some breastfeeding, receiving some formula supplement.

WE

Woman, fully breastfeeding.

WP

Woman, pregnant.

WN

Woman, non-breastfeeding, postpartum.

Attachments



Contents

Certification Checklist

- Pregnant Woman
- Breastfeeding Woman
- ◆ Infant
- ◆ Child

Recertification Checklist

◆ Child

Nutrition Education Checklist

Certification Checklist

Applicant Prescreening

Observation	(x)	Comments/Questions
Screened for eligibility		
Collected basic participant info		
Scheduled appointment		
Informed what to bring to appointment		
Participant not eligible		

Certification – Pregnant Woman

Observation	(x)	Comments/Questions
Check-in at front desk		,
Collected basic participant info		
Proof of income, residency and ID		
Rights and Responsibilities		
Participant Signature Form		
Offered voter registration		
Height and weight		
Blood test		
Health history		
Diet information		
Nutrition education		
Next steps		
Risk factors		
Food package assignment		
Scheduled for quarterly nutrition education		
Referrals given		
Health outcome summary statement		
Food benefits and Food List issued and		
instructed on use		
eWIC card issued and instructed on use		

Certification – Breastfeeding Woman

Observation	(x)	Comments/Questions
Check-in at front desk		
Collected basic participant info		
Proof of income, residency and ID		
Rights and Responsibilities		
Participant Signature Form		
Offered voter registration		
Height and weight		
Blood test		
Health history		
Diet information		
Nutrition education		
Next steps		
Risk factors		
Food package assignment		
Scheduled for quarterly nutrition		
Referrals given		
Health outcome summary statement		
Food benefits and Food List issued and		
instructed on use		
eWIC card issued and instructed on use		

Certification – Infant

Observation	(x)	Comments/Questions
Check-in at front desk		
Collected basic participant info		
Proof of income, residency and ID		
Rights and Responsibilities		
Participant Signature Form		
Height and weight		
Health history		
Diet information		
Nutrition education		
Next steps		
Risk factors		
Food package assignment		
Scheduled for quarterly nutrition		
Referrals given		
Health outcome summary statement		
Food benefits and Food List issued and instructed on use		
eWIC card issued and instructed on use		

Certification - Child

Observation	(x)	Comments/Questions
Check-in at front desk		
Collected basic participant info		
Proof of income, residency and ID		
Rights and Responsibilities		
Participant Signature Form		
Height and weight		
Blood test		
Immunizations reviewed		
Health history		
Diet information		
Nutrition education		
Next steps		
Risk factors		
Food package assignment		
Scheduled for quarterly nutrition		
Referrals given		
Health outcome summary statement		
Food benefits and Food List issued and		
instructed on use		
eWIC card issued and instructed on use		

Recertification - Child

Observation	(x)	Comments/Questions
Check-in at front desk		
Updated basic participant info		
Proof of income, residency and ID		
Rights and Responsibilities		
Participant Signature Form		
Height and weight		
Blood test		
Immunizations reviewed		
Health history		
Diet information		
Nutrition education		
Next steps		
Risk factors		
Food package assignment		
Scheduled for quarterly nutrition		
Referrals given		
Health outcome summary statement		
Food benefits and Food List issued and		
instructed on use		
eWIC card issued (if needed)		

Individual Follow-Up (Nutrition Education)

Observation	(x)	Comments/Questions
Check-in at front desk		
Updated participant information		
Nutrition education provided		
Food benefits issued		
Documentation in TWIST		

Group Education Class (Nutrition Education)

Observation	(x)	Comments/Questions
Check-in at front desk		
Nutrition education provided		
Food benefits issued		
Documentation in TWIST		

Breastfeeding Class for Pregnant Women (Nutrition Education)

Observation	(x)	Comments/Questions
Check-in at front desk		
Breastfeeding education provided		
Food benefits issued		
Documentation in TWIST		

What successful shoppers need to know

Local WIC staff must educate new eWIC cardholders on the correct use of the eWIC card in order for them to successfully access WIC food benefits and make the most effective use of programs. WIC staff can use their Participant Centered Services (PCS) skills to explore with the eWIC cardholder what they already know and which of the following information they need. Consider using the Explore – Offer – Explore technique to narrow down what the cardholder feels is most important to learn.

		successial onoppers recta To know	
NT.	eWIC Objectives	Encorp de la desartencia de la	M-4
No.	for Cardholders	Ensure that they know this:	Materials to help
1.	Cardholder can	a. Food benefits for all family	Benefits list
	describe how they	members on WIC will be combined	
	receive food	(aggregated) into a single benefit	
	benefits and where	balance.	
	to spend them.	b. How to find out which stores, farm	
		stands and farmers' markets in their area accept the eWIC card.	or Store website
		 Foods purchased with eWIC will be debited from their benefit balance. 	Benefits list
		d. How many and which month's benefits are being issued at this visit.	Benefits list
		e. The current month of benefits is the only one available for use.	Benefits list
		f. Unused benefits do not roll over to the next month.	Benefits list
		g. Benefit list will indicate when benefits become available and expire.	Benefits list
		h. Benefits are available at 12:01 a.m. Pacific Time on the first date available and expire at 11:59 p.m. Pacific Time on the last date.	Using your Oregon eWIC card brochure, when applicable

No.	eWIC Objectives for Cardholders	Ensure that they know this:	Materials to help
2.	Cardholder is able to list the options for checking their current benefit balance.	a. Benefit balance will always print on their cash register receipt and can be saved for later reference.	Using your Oregon eWIC card brochure, Shopping with your eWIC card brochure and video
		 b. The different options for checking their benefit balance include: Last store receipt; WICShopper App; 24/7 Customer Service Phone line; ebtEDGE website; Printing benefit balance in store at identified register(s) or customer service desk; Benefits List can be printed by the WIC office. 	Website and customer service number are on the back of the eWIC card, Using your Oregon eWIC card brochure, Shopping with your eWIC card brochure and video
		c. Check your balance before you get to the check stand and throughout the month.	Shopping with your eWIC card brochure, Checking your food balance video, Using your Oregon eWIC card brochure
3.	Cardholder is able to describe the foods they can purchase with their WIC food benefits.	 a. Brands and kinds of foods that are allowed or not allowed. b. No substitutions are possible. The cash register will only allow specific authorized foods or brands to be purchased with the eWIC card. c. Not all stores stock all the brands on the Food List or all kinds of formula. 	Food List Shopping with your eWIC card brochure and video Explained by WIC staff, when applicable

NT	eWIC Objectives	E d d l d'	Dr
No.	for Cardholders	d. Shelf tags used by stores to identify WIC foods may not always be accurate or on all eligible foods. When in doubt, check the Food List to decide what you can buy.	Materials to help Food List
		e. When applicable, explain the details of any special food benefit the participant is receiving (i.e. soy beverage or formula).	Benefits list, Food List when applicable
		f. When applicable, explain that only infant, child, and adult formulas and medical foods can be purchased at a pharmacy (like Walgreens). Pharmacies cannot accept eWIC for any other foods, including milk.	applicable
4.	Cardholder is able to identify the approved product package sizes of each food they can purchase with their	a. Explain which foods have a minimum package size (e.g. cereal; canned fish) and which must be purchased in a specific size container (e.g. juice, peanut butter, baby food).	Food List
	food benefits or understands that certain foods must be purchased in	b. Foods will be debited from the balance in the units listed on the benefit balance. (ounces, ctrs, etc.)	Benefits list, , Checking your food balance video
	specific sizes.	c. Each food is listed in the units they can be purchased. Explain the units and abbreviations for the foods on the Benefits list. e.g.: CTR for PB or beans means a 16-18 oz. jar of beans or 16 oz. bag of beans.)	Shopping with your eWIC card brochure
		d. How to interpret gallons and fractions of gallons for fluid milk, e.g.: .5 gallon = ½ gallon.	Shopping with your eWIC card brochure

	what successful shoppers faced to know			
	eWIC Objectives			
No.	for Cardholders	Ensure that they know this	: Materials to help	
5.	Cardholder is able to state the correct use of the eWIC card at the store.	eWIC must be the first tender will be debited, before SNAP, personal cards or cash.	that Shopping with your eWIC card brochure and video	
		. Ask the store how to use your eWIC card the first time you sl there. Stores may process WIC transactions differently.	hop your eWIC card	
6.	Cardholder is able to explain how to keep the eWIC card secure.	How to activate their card and their PIN by calling the Custor Service line or logging in to the ebtEDGE website and using the cardholder data provided to the clinic (name, DOB, address including ZIP code).	mer Oregon eWIC card brochure, he Setting Your PIN	
		. Keep the card in a safe place.	Using your Oregon eWIC card brochure, Protecting your eWIC card video	
		Do not share the PIN with any and do not write the PIN on the card or in other places where it be found.	ne Oregon eWIC	
		. Change the PIN if it has been compromised.	Using your Oregon eWIC card brochure, Protecting your eWIC card video	
		. If a PIN is entered wrong four times, the card will be locked.' card will automatically be unlo at midnight. Reset the PIN bef tries by calling Customer Servi	The Oregon eWIC cked card brochure, Fore 4 Protecting your	

No.	eWIC Objectives for Cardholders		Ensure that they know this:	Materials to help
		f.	Call the Customer Service line immediately to report a card lost or stolen or to deactivate a second card.	Using your Oregon eWIC card brochure, eWIC card, Protecting your eWIC card video
		g.	Replacement cards can be requested and mailed from the Customer Service phone line or ebtEDGE website. Replacement cards can also be obtained in person at the WIC office.	Using your Oregon eWIC card brochure, Protecting your eWIC card video
7.	Participant is able to explain how to use the fruit and	a.	Benefit is for a specific dollar amount listed on the benefit balance.	Benefits list
	veggie benefit at the store or authorized eWIC farmers.	b.	Can purchase more than the value of the benefit and pay the difference with another form of payment.	Shopping with your eWIC card brochure
8.	Participant is able to identify	a.	Does not sell or attempt to sell eWIC card or foods.	Rights and Responsibilities
	appropriate actions relating to WIC food benefit use.	b.	Does not return foods purchased with the eWIC card to store for money or a different product.	Rights and Responsibilities
		c.	Can't ask for or accept rain checks or IOUs.	Shopping with your eWIC card brochure
		d.	Can use coupons, loyalty cards or buy one, get one specials.	Shopping with your eWIC card brochure

	what Successful Shoppers Need 10 Know			
	eWIC Objectives			
No.			Ensure that they know this:	Materials to help
9.	Participant knows what to do when they have a problem at the check stand.	a. •	Knows where to call: Call the WIC clinic if you weren't allowed to purchase a food that you think is WIC eligible, if you have questions about your food benefits or if you received poor customer service at the store; Call the Customer Service line if you had trouble using your card, need to reset your PIN, or need to dispute a transaction.	Using your Oregon eWIC card brochure and Shopping with your eWIC card brochure
			Cardholder understands that any purchase of a food not on the APL will automatically be rejected by the system and that the checker cannot override this. If the system goes down, stores will not be able to do a manual eWIC transaction. Shopper will have to go to another store or come back when the system is up.	Shopping with your eWIC card brochure and video By WIC staff, as needed
10.	Participant is able to describe the functions of the second cardholder.	a.	The first cardholder can designate someone to be a second cardholder for shopping, or bringing children to certifications or attending second NE. The first cardholder must provide WIC the second cardholder name, DOB, and address (including ZIP code) to be issued a card for them.	By WIC staff at card issuance
		b.	The first cardholder is responsible for teaching the second cardholder how to use the card.	By WIC staff at card issuance and Protecting Your eWIC card video

Job Aids



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Job Aid Local WIC Staff

Use with Lesson 1-3

Name	WIC Job	Work Phone Number or Extension	E-mail

Job Aid

WIC Groups

Use with Lesson 2–1

WIC Group Name	Type of Group	Languages Offered

Job Aid

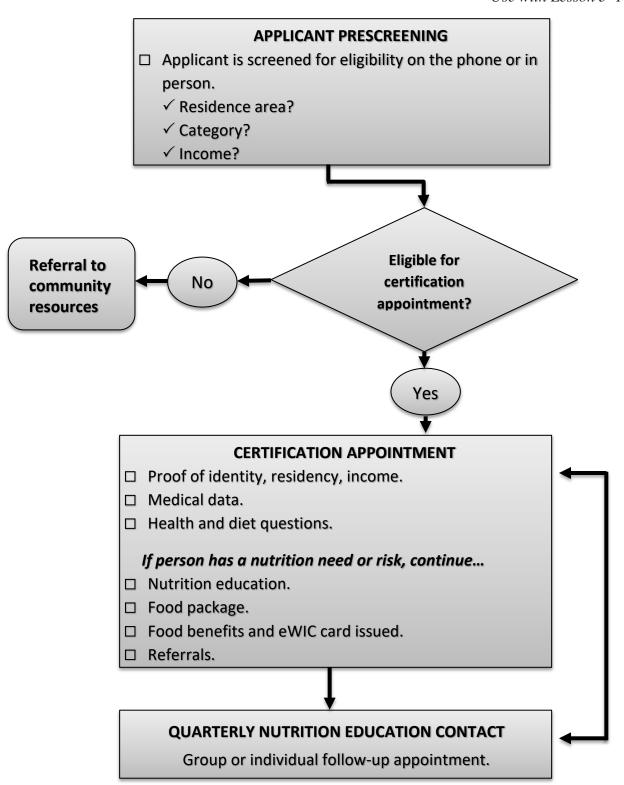
Referrals

Use with Lesson 2–4

Referral Topic	Name of Agency in Your Community	Contact Information
Alcohol Abuse / Rehabilitation		
Breastfeeding / Lactation Services		
Domestic Violence		
Drug Abuse / Rehabilitation		
Emergency Shelters		
Food Bank		
SNAP (Food Stamps)		
Health Clinics/ Physicians		
Head Start		
Housing		
Immunizations / Children's Shots		
OHP / Medicaid		
Smoking Cessation		
TANF / Welfare		

Job Aid Overview of WIC Certification

Use with Lesson 3–1



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Job Aid WIC Income

Use with Lesson 3–3

Household

- ♦ A person or group of people, related or not, who usually (though not necessarily) live together and whose income and consumption of goods and services are related.
- When determining the size of household for a pregnant WIC applicant, count each fetus as an additional household member, unless the woman specifically waives the increase in number.

Income

- ♦ Gross income, including overtime, before deductions for income taxes, employees' social security taxes, insurance premiums, bonds, etc.
- ◆ The determination of the amount of a household's gross income shall not be considered reduced for any reason (e.g., financial hardships, medical bills, child support).
- ♦ Individuals who can prove they are certified as fully eligible for Medicaid (the Oregon Health Plan), TANF, SNAP or FDPIR are considered automatically income eligible for WIC.

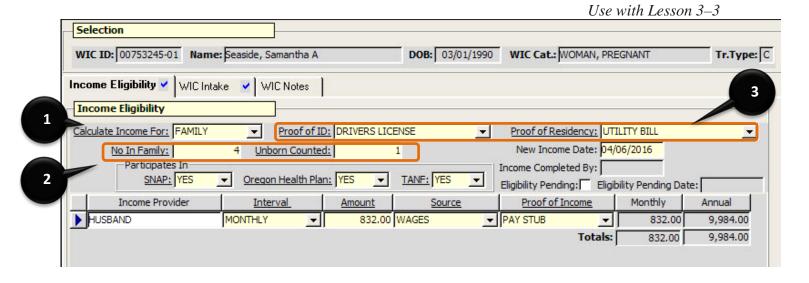
Income Includes:

- 1. Cash from salary (including overtime), wages, fees.
- 2. Net income from farm and non-farm self-employment.
- 3. Social security.
- 4. Dividends or interest on savings or bonds, estates, trusts, or net rental income.
- 5. Public assistance or TANF payments.
- 6. Unemployment compensation.
- 7. Government civilian employee or military retirement payments, or veteran's payments.
- 8. Private pensions or annuities.
- 9. Alimony or child support payment.
- 10. Regular contributions from persons not living in the household.
- 11. Net royalties.
- 12. Student loan amounts in excess of attendance costs. Attendance costs are regular tuition and fees for students carrying at least a half-time workload as determined by the institution, and allowance for books, supplies, and transportation required by the course of study.
- 13. Other cash income or allowances from any resources that are readily available to the household.
- See WIC Policies 610 616 for more information about income eligibility.

4/4	
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Job Aid

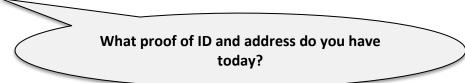
Steps for Determining Income Eligibility



Follow these steps when entering information on the TWIST "Income Eligibility" screen.

Step 1 Is this income for a "family" or for a foster child "client?"

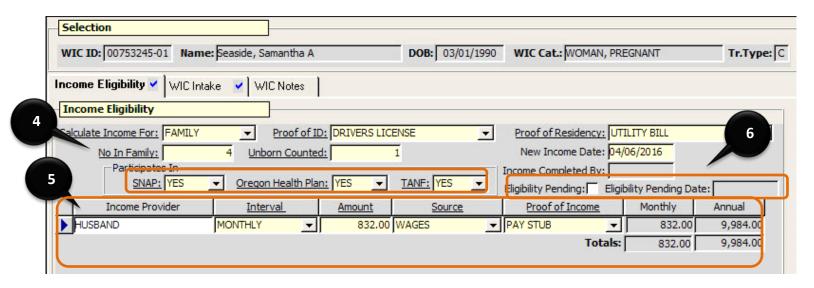
Step 2 What is their proof of ID and residency?



Step 3 What is their household size?

♦ For prenatal women, enter number of fetuses in "Unborn Counted" field.





Step 4 Does the participant participate in an adjunctively eligible program? Note the programs the participant uses.

♦ If there is proof that the participant is currently participating in one of the programs, the participant is income eligible.

Do you or your child receive TANF, SNAP, or OHP?

Did you bring proof of participation in that program?

Step 5 What is the monthly income for the household?

- Enter the income from all sources.
- Enter declared income for adjunctively eligible participants.
- ♦ TWIST calculates total monthly income and compares it to the WIC Income Guidelines.
- ◆ TWIST allows you to continue with certification only if the participant is income eligible.

What is the monthly income of your household?

What proof of income do you have?

Step 6 Does the participant need to bring back proof later?

- ♦ Use the "Eligibility Pending" checkbox and complete a "No Proof" form if participant does not have proof of ID, residency or income.
- ♦ Make sure they know what proof to bring back and the date it needs to be returned by.

Job Aid Helping Families Use the Benefits List

How would you use the Benefits List to help WIC families?

Who is the cardholder?

WIC Benefits List Benefits Available as of 09/04/2020 1:17 PM

When was this list printed?

Which family members

WIC Family ID: 2100181

FirstCardholder: SAMPLE, SARA

SecondCardholder: SAMPLE, STEVE

Benefits for:

09/04/2020 through 09/30/2020

Family Member/s:

Sample, Sara - WB

Sample, Sam - C1

Sample, Sam - C1

Sample, Suzy - IB7-12

Which months have benefits issued?

Quantity Unit Food Item Description Fruit and vegetables -fresh / frozen 20 \$\$\$ 48 ΟZ Whole grains 4.5 Fat free or 1% milk GAL

have benefits?

How much of each food are

they getting?

3.25 GAL Whole milk 2 LB Cheese CTR Lowfat or Nonfat yogurt 1 2 DOZ Eggs - large 2 CTR Peanut butter/dry or canned beans CTR Beans, dry or canned 72 ΟZ Cereal - hot / cold 2 CTR 11.5 to 12 ounce frozen juice CTR 3 64oz bottle juice 128 ΟZ Baby food - fruit / vegetables ΟZ 24 Baby cereal

Simillac Advance powder

What foods are they getting?

Benefits for: Family Member/s: 10/01/2020 10/31/2020 through

Sample, Sara-WB

CAN

Sample, Suzy - IB7-12

2

How many future months of benefits are issued?

Quantity	Unit	Food Item Description		
20	\$\$\$	Fruit and vegetables –fresh / frozen		
48	OZ	Whole grains		
4.5	GAL	Fat free or 1% milk		
3.25	GAL	Whole milk		
2	LB	Cheese		
1	CTR	Lowfat or Nonfat yogurt		
2	DOZ	Eggs – large		
2	CTR	Peanut butter/dry or canned beans Are family		
1	CTR	Beans, dry or canned members		
72	OZ	Cereal – hot / cold benefits		
2	CTR	11.5 to 12 ounce frozen juice	combined?	
3	CTR	64oz bottle juice		
128	OZ	Baby food -fruit / vegetables		
24	OZ	Baby cereal		
2	CAN	Simillac Advance powder		

Your next appointment will be

. Your WIC clinic phone number is (503) 988-3503.

When should they come back to the clinic?

Types and Units of Foods

Food Category	Short Description	Long Description	Unit of measure	Measure Description
Cheese	Cheese	Cheese	LB	pound
Eggs	Eggs- large	Eggs – large	DOZ	dozen
Cereal	Cereal – hot/cold	Cereal – hot/cold	OZ	ounce
Peanut butter or beans, dry or canned	Peanut butter/beans	Peanut butter/dry or canned beans	CTR	container 1 CTR=16-18 oz. PB or 16 oz. beans
Dry beans or peas, Canned beans	Beans, dry or canned	Beans, dry or canned	CTR	Container 1 CTR=16 oz.
Fish	Fish – canned	Fish – canned tuna/salmon/sardines	OZ	ounce
Bread or whole grains	Whole grains	100% whole wheat bread or whole grains	OZ	ounce
Fruit and vegetables	Fruit and vegetables	Fruit and vegetables – fresh/frozen	\$\$\$	Amount in dollars and cents example: \$10.00
Whole fluid milk	Whole milk	Whole milk	GAL	1.0 = 1 gallon
Fat free or 1% Milk	Lowfat milk	Lowfat or fat free milk	GAL	1.0 = 1 gallon
Soy beverage	Soy beverage	Soy beverage	GAL	1.0 = 1 gallon
Juice – 11.5-12 oz.	Frzn juice 11.5-12 oz.	11.5 to 12 ounce frozen juice	CTR	container 1 CTR = 11.5-12 ounces frozen
Juice – 64 oz.	Juice 64 oz.	64 oz. bottle juice	CTR	container 1 CTR = 64 oz. plastic bottle
Formulas	Varies	Varies	CAN, BTL, CTR, BOX, CTN	Can, bottle, container, box, carton
Baby cereal	Baby cereal	Baby cereal	ΟZ	ounce
Baby food fruits	Baby food –	Baby food –	OZ	ounce
and vegetables	fruit/veg	fruit/vegetables		
Baby food – meat	Baby food – meat	Baby food – meat	ΟZ	Ounce
Lowfat or nonfat yogurt	Low or nonfat yogurt	Lowfat or nonfat yogurt	CTR	1 CTR = 32 oz.
Whole milk yogurt	Whole milk yogurt	Whole milk yogurt	CTR	1 CTR = 32 oz.
Tofu	Tofu	Tofu	LB	16 oz. (1 lb.)

Job Aid

Compare First and Second Cardholders

	First Cardholder	Second Cardholder
Required?	Required for every account	Optional
When	Must be added to TWIST and issued	May be added to TWIST and issued
	a card at first appointment	a card at anytime
Who	Must be the adult participant or the	Can be whomever the first
	parent/caretaker of infant/child	cardholder selects
	participants	
	Must be a part of the participants'	Does not need to be a part of the
	household	participant's household
	Cannot also be second cardholder	Cannot also be first cardholder
	Cannot be a WIC staff person	Cannot be a WIC staff person
	(unless they are a participant or	(unless they are a participant or
	family member of the participant)	family member of the participant)
Address	Defaults to the family address in	Any address can be used
	TWIST Client Master Demographics	
Roles	Can bring in infant/child for recerts	Can bring in infant/child for recerts
	and follow up appts	and follow up appts
	Can make and change appts	Can make and change appts
	Can attend NE	Can attend NE
	Can make changes to food package	Can make changes to food package
	Can purchase WIC foods with eWIC	
	card	eWIC card
	Can report their own card lost,	Can report their own card lost,
	stolen, or damaged	stolen, or damaged
	Can access account benefit balance	Can access account benefit balance
	and transaction information from	and transaction information from
	the customer service line or cardholder website	the customer service line or cardholder website
	Can select and change the second cardholder	Cannot make any changes to cardholders
	Can transfer participants to another	Cannot transfer participants
	agency or out of state	Cannot discontinue WIC services
	Can discontinue WIC services for	
	family	for family

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