

WIC COORDINATOR TRAINING CHECKLIST

Complete prior to meeting with State Nutrition Consultant:

1. WIC Program Overview	2. Caseload Management	3. Local Agency Staff	4. Nutrition Education	5. Program Integrity
<p>Review policies: __600 __511 __1100</p> <p>__Complete Introduction to WIC Module</p> <p>__Observe clinic flow including check-in procedures and certification process</p> <p>__Observe benefit issuance and shopper education</p> <p>__Determine if WIC services are provided outside of the clinic eg: during home visits</p> <p>__Identify services provided at satellite or out clinic sites</p> <p>__Review agency procedures for Farm Direct Nutrition Program (FDNP) check security and issuance</p>	<p>Review policies: __325 __605</p> <p>__Review The WIC Information System Tracker (TWIST) caseload reports</p> <p>__Review TWIST show rate reports</p> <p>__Review agency staffing patterns</p> <p>__Review appointment availability</p> <p>__Review outreach log</p>	<p>Review policies: __440 __661 __660 __710</p> <p>__Identify number of FTEs for each role in the agency</p> <p>__Review TWIST racial /ethnic report</p> <p>__Identify number of bilingual staff</p> <p>__Identify registered dietitian (RD) staff</p> <p>__Identify breastfeeding coordinator</p> <p>__Identify training supervisor</p> <p>__Review Nutrition Services Plan for quarterly continuing education in-services</p> <p>__Review local agency training log</p>	<p>Review policies: __810 __820</p> <p>__Observe individual second nutrition education appointments (IE, FU)</p> <p>__Observe group education (GE)</p> <p>__Review local policy and procedure for use of online classes</p> <p>__Review current year's Nutrition Services Plan</p> <p>__Review evaluation of previous year's Nutrition Services Plan</p>	<p>Review policies: __316 __452 __500 __596</p> <p>__Review most recent time study</p> <p>__Locate the Oregon Policy and Procedure manual (PPM) on the Oregon WIC website</p> <p>__Review written local agency procedures</p> <p>__Complete civil rights training</p> <p>__Complete employee signature form</p>
6. Data System Use	7. Local Program Operations	8. Utilizes Resources	9. Leadership	Notes:
<p>__Obtain access to TWIST</p>	<p>__Review most recent biennial agency review report and Corrective Action Plan (CAP)</p> <p>__Review materials from most recent agency self audit</p>	<p>__Identify how state communications are shared with staff</p> <p>__Explore the Oregon WIC website</p>	<p>__Review state annual report and county data sheets on the Oregon WIC website</p>	

Complete during meeting with State Nutrition Consultant:

1. WIC Program Overview	2. Caseload Management	3. Local Agency Staff	4. Nutrition Education	5. Program Integrity
<p>__Discuss clinic processes</p>	<p>__Review Council of Local Health Officials (CLHO) funding formula</p> <p>__Discuss TWIST caseload reports</p> <p>__Review outreach plan</p>	<p>__Discuss staff training plan</p> <p>__Review Competent Professional Authority (CPA) competency model</p> <p>__Review Module completed/uncompleted report in TWIST</p> <p>__Discuss documentation of staff training</p>	<p>__Discuss local agency breastfeeding support and promotion</p> <p>__Review second nutrition education opportunities for participants</p> <p>__Review use of participant centered education (PCE) in classes and individual interactions</p> <p>__Review Nutrition Services Plan</p>	<p>__Review recent time studies</p> <p>__Determine how policy updates will be communicated and implemented</p> <p>__Review complaint procedure</p>
6. Data System Use	7. Local Program Operations	8. Utilizes Resources	9. Leadership	Notes:
<p>Provide TWIST training on:</p> <p>__entering module completion</p> <p>__completing chart audits</p> <p>__printing reports</p> <p>__maintaining user IDs and passwords</p> <p>__updating staff information</p> <p>__updating clinic information</p> <p>__updating referral organizations</p>	<p>__Discuss most recent state local agency review</p> <p>__Review most recent agency self audit materials</p> <p>__Review use of participant centered service (PCS) for providing customer service</p> <p>__Review Farm Direct Nutrition Program (FDNP) procedures</p>	<p>__Review available state resources</p> <p>__Review state contact information</p> <p>__Identify Oregon WIC Coordinators Association (OWCA) meeting schedule</p>	<p>__Discuss interest in mentoring from an experienced coordinator</p> <p>__Provide information on the Oregon WIC Coordinators Association (OWCA)</p>	

Complete within one month of meeting with the State Nutrition Consultant:

1. WIC Program Overview	2. Caseload Management	3. Local Agency Staff	4. Nutrition Education	5. Program Integrity
<p>Review policies: __451 __510 __610 to 616 __655 __625 __626 __645 __646 __670 __675</p>	<p>Review policies: __470 __475</p> <p>__Identify procedures for appointment notification</p> <p>__Review PCE online module</p> <p>__Identify clinic hours and locations</p> <p>__Identify phone hours and accessibility</p> <p>__Identify staff responsible for appointment scheduling</p> <p>__Determine schedule for running auto scheduler</p> <p>__Review appointment templates</p> <p>__Review appointment scheduler reports in TWIST</p> <p>__Complete Food Package module</p>	<p>Review policies: __435 __480</p> <p>__Complete Breastfeeding module</p> <p>__Complete PCE training modules</p> <p>__Review Anthropometric module</p> <p>__Review Hematological module</p> <p>__Review Nutrition Risk and Dietary Risk modules</p> <p>__Identify strategies used in the past for training staff at this agency</p>	<p>Review policies: __830 __850</p> <p>__Observe clinic environment for breastfeeding friendly characteristics</p> <p>__Observe prenatal certification</p> <p>__Observe breastfeeding class</p> <p>__Observe breastfeeding consultation</p> <p>__Observe breast pump issuance</p> <p>__Complete Marketing Nutrition Education module</p> <p>__Review agency's lesson plans</p> <p>__Observe a high risk appointment</p>	<p>Review policies: __450 __635 __561 __636 __588 __712 __590 __713 __595 __735 __596 __769 __620 __621</p> <p>__Review agency's business standards for work ethics</p> <p>__Review outreach materials for discrimination statement</p> <p>__Assess physical setting for ADA accessibility</p> <p>__Identify availability of materials for major language groups served by the agency</p> <p>__Identify agency ordering procedures</p> <p>__Review quarterly inventory for eWIC card stock</p> <p>__Identify location of form retention for signature forms, voucher stubs, med doc, etc.</p> <p>__Locate voter registration forms</p> <p>__Review process for monitoring clinics staffed by a</p>

				<p>single staff person</p> <p>__Review cleaning log for blood testing equipment</p> <p>__Observe procedures to protect participant confidentiality</p> <p>__Identify staff responsible for printing and mailing termination/graduation letters</p>
6. Data System Use	7. Local Program Operations	8. Utilizes Resources	9. Leadership	Notes:
<p>__Utilize appointment scheduler</p>	<p>Review policy __215</p> <p>__Identify key partners</p> <p>__Identify agency liaison with state FDNP coordinator</p> <p>__Identify location of FDNP check registers for past three years</p>	<p>__Review policy 425</p> <p>__Identify process for reimbursement of travel for meeting attendance</p> <p>__Review information on the Oregon WIC website pages for staff, coordinators and medical providers</p> <p>__Explore National WIC Association (NWA) website</p>	<p>__Review Oregon WIC Program mission statement</p> <p>__Role model PCS when facilitating staff meetings and interacting with staff an participants</p> <p>__Review WIC outreach power point presentation on coordinator page of WIC website</p>	