WASHINGTON

Required Guidance: Remote PE - Complete Assessment

Staff must offer both in person and remote PE – Complete Assessment appointments and let the participant decide which option they prefer.

As part of the American Rescue Plan Act (ARPA) policy waivers allowed by the Food and Nutrition Service (FNS), this policy is in effect from September 1, 2023 until September 30, 2026.

When providing a remote PE – Complete Assessment, the CPA must:

1. Complete the remote PE – Complete Assessment using an agency landline phone, agency cell phone or secure video chat.
    - Check with your IT staff or staff at the state WIC office about what electronic methods meet the definition of a secure video chat.
2. Use an interpreter for the contact when bi-lingual staff aren't available to interpret for a participant with Limited English Proficiency (LEP).
    - Document the use of an interpreter service in the participant's file.
    - See the "Use and Interpreter" policy in Volume 1, Chapter 11 – Assessment for more information.
3. Complete the required elements of a PE – Complete Assessment as listed in procedure below.
    - Separation of duties between income eligibility and nutrition risk eligibility is required.

Note: When providing an in-person PE – Complete Assessment follow policies and procedures in Volume 1, Chapter 18 - Certification.

PROCEDURE:

Staff:

A. When making the PE – Complete Assessment appointment:

1. Inform the person you'll need to see documentation of identification, residency, and/or income if it wasn't provided at the Presume Eligible appointment. Offer the following options:

    a. Share a ProviderOne number and staff verify it returns a positive result.

    b. Mail the documents to the clinic. Inform the person you'll shred these documents after viewing and that WIC doesn't keep copies.

        - File documents securely until entered in Cascades, then shred immediately after use.

    c. Have the documents ready to show staff if the person agrees to a secure video chat appointment.

    d. Send copies using an encrypted email or fax. Inform the person you'll shred hard copy documents after viewing and that WIC doesn't keep copies.

    e. Bring the documents to the clinic prior to the appointment.

2. Ask if the participant has had any health care appointments recently or will have an appointment prior to the PE – Complete Assessment appointment.

    a. Provide the Measurement and Bloodwork Information Form link to the person so the health care provider can document measurements and bloodwork values.

    b. Ask the person to access their electronic health record or have an after-visit summary on hand during the certification and verbally share the measurements and bloodwork values.

B. During the appointment give a brief description of what will occur.

1. Let the participant know the information is confidential and approximately how long the appointment will take.

2. It's best practice to let the participant know you'll ask questions about potentially personal information so they can decide if they're in an area where they can answer these questions.

3. It's also helpful to let participants know staff will enter the information into a computer so they're aware of what's occurring during this interaction.

C. Document all required information on the participant's **Family Demographics, Participant Demographics**, and **Income Information** screen that wasn't entered at the Presume Eligible appointment, for example, missing documentation of identity, residency, or income.

1. The person must provide any missing documentation showing WIC eligibility to continue receiving WIC benefits.

2. Provide the "Not Eligible" letter if the person isn't eligible for WIC and provide referrals to other social and health services.

3. Select Physical Presence – select "No" and select the Physical Presence Exception Reason "Remote Appointment" on the **Participant Demographics** screen.

D. Obtain and document measurements and bloodwork values when possible.

1. Make and document concerted efforts to get referral data for measurements and iron test values. Concerted efforts may include the following:

   a. Provide the Measurement and Bloodwork Information Form to participants to obtain measurements and bloodwork values from their health care provider to share with WIC.

   b. Ask if the person has access to their electronic medical record (for example a Patient Portal or "My Chart") and ask them to verbally share the measurements in their electronic medical record.

      Note: It's important for the person to only share measurements directly from the electronic health record, or those documented by the provider to assure staff enter accurate measurements in the participant's file.

   c. Obtain the values when staff have access to a participant's medical records.

   d. Offer in-clinic measurement and bloodwork days, or appointments.

   e. Explore Data Sharing Agreements (DSA) with programs (e.g. Early Head Start, MSS, home visiting programs, etc.) to get values from other programs or the participant's health care provider.

- If your agency has a DSA in place, provide a written notification letter in the participant's preferred language. The notification letter can be mailed, emailed, or sent via text based on the participant's preference.

- See Volume 1, Chapter 25 – Legal Considerations and Confidentiality for more information about DSAs.

f. Provide the Individual Authorization to Release WIC Information form so WIC staff can contact the Medical Provider listed in Cascades to obtain these values.

2. Document efforts to obtain measurement and bloodwork values in the participant's file as a Family Alert.

3. Document measurements and bloodwork values, when available.

a. Document measurements from another source if taken within 60 days of the certification.

b. Document the bloodwork value from another source taken in the participant's current category and within 90 days of the certification.

Note: Be sure to change the source of measurements and the date taken to reflect where and when the measurements were taken.

c. Although staff don't have to schedule monthly appointments when the measurements or bloodwork values aren't available, staff are required to follow-up within 60 days to see if measurements and bloodwork values are available.

- Assess the measurements and bloodwork values and share information about prenatal weight.
- Assign risks as needed and assure the next appointment is appropriate.
- Assure the correct foods are prescribed.
- Provide appropriate nutrition education and referrals.

Note: Documenting the participant as not physically present removes the Cascades requirement to enter measurements and iron test values when presuming eligible a pregnant participant, but not when completing the

PE – Complete Assessment. Follow this guidance for the PE Complete Assessment:

1) Enter the pregnant participant's height and weight.

2) Document "Participant not present" in the Bloodwork Deferred reason. This will give the 90-day deferment for iron test values.

E. Ask the required (**bold**) Assessment Questions for the pregnant participant.

a. Ask if the participant is in a safe, confidential place. Don't ask the Domestic Violence/Safety question when the participant doesn't confirm they are in a safe or confidential place when providing remote services.

- Document "didn't ask due to safety concerns" in the field next to this Assessment Question on the **Family Assessment** screen when it applies.
- Follow guidance in the "Domestic Violence Assessment Question during Remote Services" policy for risk assessment, referrals and resources.
- Share with all new participants, the domestic violence referral information on the WIC ID and Card Folder.

b. Promote breastfeeding to pregnant participants by exploring questions and concerns about breastfeeding.

- Offer information to address concerns and document in participant's file.
- Offer breastfeeding peer support if available.

c. Document answers to questions in the participant's file

F. Ask where the person heard about WIC at the initial certification for the family.

1. Staff only ask one time for the family when the first person is certified and document the answer on the **Family Assessment** screen in Cascades.

G. Assign all appropriate risk factors.

H. Review the information on the **Certification Summary** screen and if the information is correct, press the **Complete Assessment** button.

1. Let the participant know how long they are eligible for WIC.

2. Share that WIC will reassess the participant's eligibility at the end of the certification period.

I. Have a conversation and set goals with the participant as appropriate.

J. Offer nutrition education and referrals based on the dietary and health assessment, the participant's interests, relevant concerns or needs.

K. Review the food prescription to make sure it is appropriate for the participant and update the prescription as needed.

L. Issue food benefits.

1. Issue food benefits for the appropriate number of months (1, 2 or 3 months of issuance) based on the next appointment needs.

2. Staff sign for the food benefits by writing "RBI" (Remote Benefit Issuance) and their initials.

M. Ask about the WIC shopping experience and provide education and information as needed.

1. Ask if the participant can download and view the WIC Shopping Guide on the WIC website to see the foods while staff review them on the phone or during the video chat.

   - Delete all shopping lists from the Downloads folder on your computer after generating reports or printing a Shopping List in Cascades.

2. Encourage the participant to consider downloading the WIC Shopper App.

N. Schedule the participant's next appointment based on their needs and if follow-up is needed for measurement and bloodwork values.

O. Let the participant know:

1. What to provide at (or before) the next appointment, for example current measurements, or iron test results.

2. They can transfer their WIC eligibility if they move.

P. Thank the participant for participating in WIC and offer a phone number for questions.

Q. Document the PE – Complete Assessment appointment and nutrition education according to the "Nutrition Education at the Initial and Subsequent Certification an Presume Eligible Complete Assessment" policy in the participant's Individual Care Plan.

- Title the Care Plan note as "Remote PE – Complete Assessment."

DOH 960-367 October 2023