

Pump Documentation Guide

Documentation in Cascades for breast pump and breastfeeding contacts is a requirement for [Volume 1, Chapter 15 Breastfeeding Policy and Procedures](#). This guide is available to provide further support to WIC staff and is a supplement for policy, not a replacement.

Listed below are the different areas of documentation. This list is not exhaustive, and staff may need to document beyond the areas listed. This guide covers:

1. [Where to Document in Cascades](#)
2. [Pump Issuance – What to Include in Your Notes](#)
3. [Pump and Supply Issuance Example Notes](#)
4. [Timely Follow-up Notes](#)
5. [Pump Recovery and Example Notes](#)
 - [Pump Recovery Attempts – What Counts as an Attempt?](#)

Keep in mind these requirements with documentation:

- Save a copy of the [Pump Supply Release of Liability Form](#) in Cascades.
- Additional resource: [Cascades Breast Pump and Supplies Issuance](#) steps sheet for assistance.

Follow-up documentation and guidance according to [Volume 1, Chapter 15 Breastfeeding policy](#):

- Follow up with participants **within two business days** of issuance (excluding weekends and holidays).
- If staff contacts a participant as agreed, this counts as a follow-up whether or not they connect with the participant.
 - For example: Staff calls a participant with no answer and/or voicemail. This counts as the follow-up. Staff may continue attempts to reach the participant if they so desire.
- Staff must document the contact attempt in Cascades even if there is no response from participant.
 - Document follow-up notes in Cascades under **Care Plan Summary-Family Care Plan** in the **Nutrition Assessment section** for all breastfeeding and pump documentation and contacts.

Documentation Tips

Below is information on how to document pump and pump supply issuance in Cascades. For more guidance, review [Volume 1, Chapter 15 Breastfeeding policy](#) on requirements for pump issuance and documentation.

1. Where to Document in Cascades

Document all breastfeeding, pump, pump supply, and contact notes in Cascades under **Care Plan Summary-Family Care Plan** in the **Nutrition Assessment section**, according to [Volume 1, Chapter 15 Breastfeeding policy](#).

2. Pump Issuance – What to Include in Your Notes

In your notes, you must include, at a minimum:

- **What, Why, When**, and sometimes **any exceptions/special arrangements**.
- Additional notes can be included as noted in “Issue Breast Pumps” of [Volume 1, Chapter 15 Breastfeeding policy](#).
- Documentation should allow any staff to follow what has occurred between staff and the participant contact.

Below are documentation examples (Staff do not need to include the exact wording below – just ensure the key points are available in your notes):

What: The type of pump issued. (This makes it simpler for other staff to know which pump was issued without having to exit the note to locate the information.)

- Example: *Lansinoh Milk Collector Manual pump was issued.*

Why: Reason for pump issuance, concern, and breastfeeding resources provided.

- Example note: *The participant shared when breastfeeding their infant, they leak constantly from the other breast and sometimes attempt to hold a bag under their other breast to capture the leaking breast milk. They even attempted to tape the bag onto their breast so that they didn't have to hold it, but it didn't work.*

Issued a milk collector to use when feeding their infant to capture the milk from the side the participant isn't feeding. Reviewed a video with the participant on how to use the milk collector. The participant shared has used a milk collector in the past and declined support in the office.

When: Plans to **follow-up within 2 business days** to meet policy requirement and/or referral. (This note allows other staff to step in and follow-up with the participant.)

- Example note: *Completed the Release of Liability Form with the participant that I would follow-up by Tuesday of next week to determine how everything is going with the pump and if they have any questions or concerns. Provided the participant with a contact phone number to a lactation support help line when WIC office is closed. Also provided the number to contact the WIC clinic and myself for further support.*

Pump issuance details (e.g., remote issuance, participant not present) and any **exceptions** requested.

- Example of no exception note: *Pump issuance was conducted in-person, and no exceptions were needed for this issuance.*
- Example of exception note: *Requested exception to issue a manual pump to participant as infant is now 12-months old and Cascades won't allow pump issuance – would like to support this family. Received approval from Flo with State Breast pump SME. Issued Medela Harmony manual pump and removed one pump from Cascades inventory as Cascades would no longer allow pump issuance under the lactating participant.*

3. Pump and Supply Issuance Example Notes

Example Pump and Supply Issuance Scenario:

Pump Scenario: Participant shares during WIC remote video appointment that chestfeeding is going well but needs support with feeding the infant from family. Participant is using a manual pump that's not working well. Participant is considering supplementing with formula as they feel they can only be away from infant 2 to 3 hours and has to express milk. Participant shares they want to continue breastfeeding and make it as long as possible.

Example of pump issuance note in Cascades:

Issued Hygeia Evolve personal use pump as participant was familiar and preferred this pump.

Participant shared during a remote video appointment that breastfeeding is going well but finding it difficult to express and pump milk with manual pump so family can help feed the infant. Participant wants to continue providing their milk but is struggling with not being able to have family support in feeding their infant and was considering adding formula. Shared my screen and reviewed the Pump Release of Liability with the participant and established follow-up plan, within 2 business days. Provided the participant with my and clinic contact information as well as an after-hours contact for lactation support. Discussed how to assemble and clean the pump by viewing a short recording during the appointment. Discussed flange sizing for the pump and participant shared using a 17 flange and 19 flange on the other side of chest. Issued two flange sizes. The participant is comfortable using the flanges and will contact us if has any questions. Also confirmed the participant knew where to locate Hygeia contact information.

Participant lives an hour away from the WIC office, but their partner can pick up in the morning. Confirmed the contact information of partner and would have the pump available at front desk. Also added breast pads for the participant in the package along with a black tote. Participant shared that she knows how to use the pads and has no questions at this time. No pump exceptions were needed for this issuance.

4. Timely Follow-up Notes

Following up with participants **within two business days** of pump issuance is a policy requirement. It allows staff to address any questions or concerns participants have about their pump and pump supplies. We want them to have a successful pumping experience!

- On the Pump Release of Liability Form, participants and WIC staff will determine a follow-up timeframe that fits within two business days (excluding weekends (unless the WIC office is open on weekends) and holidays). WIC staff will also be asked to acknowledge this timeframe (staff initial on the Pump Release of Liability Form).
- At the end of the appointment, remind the participant that you'll follow up within the agreed upon timeframe.

Example follow-up notes in Cascades (two business days later, as discussed with the participant. Follow-up contact attempted by phone.):

Scenario note: Staff called the participant but phone just rang and then message stated voicemail not setup.

- Staff follow-up note in Cascades (first follow-up):
Attempted to contact the participant at their preferred method of contact phone call. Message stated voicemail not setup. Added Family alert that attempted to contact participant on pump issuance follow-up if they call back.
- Staff follow-up note in Cascades (second follow-up):
*Participant called back after noticing missed call. Left message asking to call them back and would be available for the next couple hours or tomorrow.
Called participant back and connected with the participant by phone. Participant received the Hygeia Evolve personal use pump from partner and was able to successfully set up the pump using the material in the pump package and had no concerns. Participant shared they were able to begin pumping and store breastmilk. The participant has no questions and will reach out if any come up.*

Remember to document your breastfeeding and pump supplies follow-up notes in Cascades under **Care Plan Summary-Family Care Plan** in the **Nutrition Assessment section**.

5. Pump Recovery and Example Notes

Below are important reminders and information on how to document pump recovery in Cascades. For more guidance, review [Volume 1, Chapter 15 Breastfeeding policy](#), under [Track Electric Breast Pump Inventory](#) and [Lost or Stolen Multi-user Breast Pumps](#).

- Multi-user breast pump recovery begins **within three business days** when a pump is overdue to the clinic.
- When staff requests participant “transfer out of state”, ask participants with multi-user breast pumps to return the pump before they transfer out of state.
- Note: Staff can’t withhold transfer or WIC benefits if a pump is not returned.
- Document each recovery attempt in Cascades under **Care Plan Summary-Family Care Plan** in the **Nutrition Assessment section**.
- In your recovery notes, include the following according to [Volume 1, Chapter 15 policy](#) (Staff do not need to use exact wording below. This is just an example.):
 - The pump number and manufacturer. This helps other staff know which pump to reference if other staff receives the pump when returned.
 - Example note: *EBP#743442 Unimom Opera.*
 - How staff attempted to contact the participant.
 - Example note: *Called participant at contact number from Pump Release of Liability.*
 - The dates of contacts or attempted contacts:
 - Example note: *Mailed participant letter on Monday, June 15th.*
 - Any communication with the participant.
 - Example note: *Spoke with participant at follow-up monthly check-in on Wednesday, June 7th and participant shared they haven’t been using the pump as they received a pump through medical insurance. They plan to return the pump to the office on Friday of this week. Documented a family alert the participant was returning the pump and had stopped using.*
 - Example of a complete recovery note:
Contacted by phone participant regarding Lactina EBP #444553 as the pump was to be returned by Monday, Sept 18, as they no longer needed the multi-user pump from follow-up contact. Spoke with the participant by phone Wednesday, Sept. 20th and asked if they could return the pump and if they needed assistance in returning the pump. Participant shared they’d return the pump tomorrow, Thursday, Sept. 21st of this week as they have an appointment nearby the WIC clinic. Updated family alert that participant would be returning the pump tomorrow, Thursday. The participant will be returning the pump to the front office staff. Advised participant they’d receive a receipt/confirmation of their return.
- After two unsuccessful attempts, staff can submit the Lost, Stolen or Damaged Multi-user Electric Breast Pump Report.

- **Pump Recovery Attempts:**

- Your two recovery attempts may include one of the following but is not limited to:
 - Calling or emailing the participant
 - Speaking with the participant at a WIC appointment
 - Mailing letter (even if letter returned)
- Optional: Staff have the discretion to continue with more than two recovery attempts if they feel the participant will return the pump.
- Remember to document each attempt in Cascades according to policy [Volume, 1 Chapter 15](#).

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