



Staff Tool: Initial Certification and Subsequent Certifications Checklist

*Ensure Separation of Duties between income eligibility and nutrition risk eligibility



Cascades Screen	✓	Certification Task
<Language Needs>		Use an interpreter when needed and document Language Read and Language Spoken in Family Demographic screen in Cascades
Greet participant		<ul style="list-style-type: none"> • Welcome and share brief description of the program • Explain what is going to happen today and how long it may take
Family Demographics		<ul style="list-style-type: none"> • Check proof of residency (check for migrant/homeless status) • Ask if participant or caregiver is interested in registering to vote or voter registration information
Participant Demographics		<ul style="list-style-type: none"> • Check ID for participant • Collect race and ethnicity data for each participant • Remote: Select “No” for Physical Presence and “Remote Appt” for Exception Reason
Income		<ul style="list-style-type: none"> • Assess income eligibility - adjunctive or income based* • Check proof of adjunctive eligibility or proofs of income. (*Adjunct eligibility includes ProviderOne, SNAP, TANF, FDPIR)
Health Information & many Cascades screens		Ask all required (bolded) Assessment Questions and non-bolded follow up questions as appropriate.
Health Information		<ul style="list-style-type: none"> • Ask about child’s Immunizations (IZ) - number of DTaPs, view IZ record if available or check IZ database if accessible • Document infant’s/child’s status in Cascades
Anthro/Lab		<ul style="list-style-type: none"> • Take Wt, and L/Ht or ask participant to share from medical provider. • Write Family Alert and attempt to get within 60 days if missing.
Anthro/Lab		<ul style="list-style-type: none"> • Do blood test or non-invasive hemoglobin test or ask participant to share from medical provider • Write Family Alert and attempt to get within 60 days if missing
Anthro/Lab		Document response to lead test question for children and complete required fields
Family Assessment		<ul style="list-style-type: none"> • Determine if participant is in confidential, safe space before asking domestic violence question • Document response or reason for not asking question
Dietary & Health		<ul style="list-style-type: none"> • Ask and document responses to all dietary and health questions • Ask required breastfeeding question for pregnant participants
Assigned Risk Factors		Assign all appropriate risks identified during assessment
Certification Signature		<ul style="list-style-type: none"> • Verbally review My Rights and Agreement sections of Rights & Responsibilities form and refer them to where they can find a copy (website, WICShopper app, offer to email/mail, etc.) • In-person: Capture electronic signature • Remote: Ask if agree to Agreement section R&R and staff document “Read to/ppt agreed” and sign their initials
Certification Summary		<ul style="list-style-type: none"> • Share general statement about why they qualify • Tell how long participant is eligible and that they will be reassessed at end of cert period • Press Certify button



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Care Plan – Referrals		<ul style="list-style-type: none"> Assess participant’s needs regarding referrals and based on what was learned during assessment Share and document required referrals as appropriate: <ul style="list-style-type: none"> Immunizations if not up-to-date or is unknown Medicaid when needed Help Me Grow WA network or Local Referral list for needed health / social services Lead testing if child hasn’t been tested, and Alcohol & Drug Counseling/Treatment when needed Registered Dietitian if participant identified as HR
Care Plan – Nutrition Education		<ul style="list-style-type: none"> Offer nutrition education based on participant’s needs and interests Work with participant to set a goal, if participant is ready Document topic(s) discussed on Nutrition Education / Topics screen
Drug & Harmful Substance information		<ul style="list-style-type: none"> Share with all participants and caregivers at initial certification Document Substance Use Information topic on Nutrition Education/Topics screen and any pertinent notes in Individual Care Plan (ICP)
Care Plan – Summary		<ul style="list-style-type: none"> Document education discussion and goal in ICP Document other information from assessment in ICP as appropriate
Prescribe Food Package		<ul style="list-style-type: none"> Prescribe appropriate food package based on category, age, needs, and preferences including substitution options Assess need for Medical Documentation Form
Issue Benefits on Card Create EBA		<ul style="list-style-type: none"> Issue WIC Card and benefits Give the WIC ID and Card Folder
Food and Shopping Education		<ul style="list-style-type: none"> Share about WIC foods and how they contribute to a healthy diet Inform how to shop with WIC Card at the store QR code at farmers market/farm stores Review WICShopper app Share online ordering option as appropriate
WIChealth (can share anytime during certification)		<ul style="list-style-type: none"> Share option of WIChealth online lessons for nutrition education (counts as second NE contact for non HR participants) Share link to WIChealth video or material and Family ID
Master Calendar		<ul style="list-style-type: none"> Schedule the next appointment Share what to provide at or before next appointment (e.g. measurements, hgb., missing proof) Inform about transfer card Thank them for participating in WIC. Offer clinic phone number for questions

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