

Guidelines for Using the WIC Services Worksheets

The WIC Services Worksheet is a paper copy designed to guide staff in recording information for WIC Certifications, Health Assessments and other appointments when Cascades is unavailable. Use the worksheet for the participant's category to gather and document their information.

When the clinic is operating again, staff enter information from the worksheet into Cascades. All staff can enter the information from the worksheets into Cascades. The format of the worksheet closely follows the screens in Cascades. **Once staff enter the information from the worksheet and scan it into Cascades, destroy the paper copy and any attached forms following the agency's policy for disposing of participant information.**

When to use a paper worksheet:

- Hardware equipment failure
- Software problems
- Natural disasters
- Power outages
- Network problems
- Other times determined by staff

How to use the WIC Services Worksheet:

1. **Select** the worksheet for the participant category and age.
2. **Write:** Date and Completed by (staff name) at the top of the first page and write the Family Name at the bottom of each page in case the pages are separated.
3. **Check the type of contact** completed or write in the contact type next to "Other".
4. **Family Demographics:** Complete the information.
 - Be sure to document the items with asterisks since they're required fields in Cascades. This includes proof of ID and residency as required for certifications.
 - Although the Telephone field isn't required, it's important to document so you can contact the participant to issue the WIC Card and make the next appointment.
5. **Participant Demographics including Race/Ethnicity:** Race/ethnicity for **new** participants is required to be able to enter other information into the computer.
6. **Income:** Document income information when required for the service (certifications).
 - Adjunctive eligibility – document the proof seen and Self Declared Income. **Note:** You won't be able to use the ProviderOne card to verify adjunctive eligibility.
 - Income-based assessment – document Income Details and proof seen.
7. **Health Information:** Begin using the paper copy of the Assessment Questions here.
 - Document medical health conditions and other health information depending on participant category.
 - Document alcohol and drug use in the Health Conditions mover box or the Assigned Risks screen.
8. **Anthro/Lab:** Record weight, measurements, hemoglobin, and dates collected.
 - Document relevant notes about the weights, measurements or hemoglobin. For example, "Hgb. from MD on 03-12-2020."
 - Include any exempt or deferred reasons according to policy.
9. **Family Assessment:** Document if there's exposure to environmental tobacco smoke, safety concerns, and medical provider(s). Document where they heard about WIC for initial certifications only.
10. **Dietary & Health:** Listen and assess for nutrition risks. Document risks and make notes as needed.
11. **(Optional) Eco-social:** Complete fields as needed.

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12. **Assigned Risk Factors:** Document any additional risks identified using the Assessment Questions.
13. **Certification Signature:** Have the participant or parent sign a paper copy of the Rights and Responsibilities and other forms as needed during the appointment (for example Temporary Certification for Missing Proof of Income Form).
 - Attach all forms to the WIC Services Worksheets and keep them in a secure location until the information is entered in Cascades.
 - For the R & R electronic signature in Cascades, staff write “scanned R & R” and their initials. Use the same format for any other required form the participant signed that requires an electronic signature.
14. **Certification Summary:** Determine and document High Risk (Professional Discretion) as appropriate at a certification. Make notes as needed.
15. **Identify the Cardholder:** Document who will be the Cardholder and if the participant wants the WIC Card mailed or if they’ll return to the clinic for the card when the event is over.
 - Activate the WIC Card when the computer is available again.
 - Mail the card and Shopping List, or notify participant when the card is ready to pick up.
16. **Issue Benefits/Prescribe Food:** Document any requested or needed food prescription changes and scan the Medical Documentation Form (MDF) if applicable.
17. **Issue Food Instruments:**
 - Document Family Issuance Day (the date staff issue food benefits for new participants) and the number of months of issuance (Issuance Frequency).
 - Electronic signature for food benefits: Staff sign their name and write “RBI” (Remote Benefits Issued) after the signature.
18. **Care Plan:**
 - **Referrals** - Document referrals provided or follow-up as needed.
 - **Nutrition Education Topics** - Record nutrition education or breastfeeding topics discussed. Include notes about what was discussed and how the participant or caregiver feels about the topic for future follow up and goal setting.
 - **Maintain Goals** - Document the goal and what next steps to achieving the goal were shared by the participant.
 - **Notes** - Make any notes or comments.
19. **Next Appointment** - Document if the participant or caregiver requested a day and time for their next appointment to make it easier when calling to set up the next appointment.
 - **Family Alerts** – include any Family Alerts.
 - **Reason Paper Copy Used** – Document the reason staff used the paper copy worksheet.
 - **Paper Copy Entered** (optional) – if several staff are entering information from the worksheets, this check box can help assure the information was entered before destroying the document(s).
20. **Enter the information from the worksheet and scan form(s) into Cascades on the Income Screen.** Verify all the information was entered and scans were successful. Destroy the worksheet(s) and form(s) according to agency policy.

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For persons with disabilities this publication is available on request in other formats.

To submit a request, please call 1-800-841-1410 (TDD/TTY 711).

