

Core WIC Training

Getting Started in WIC:
How applicants become WIC participants



Questions? Contact us:

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Phone: 1-800-841-1410
(Ask for the Communications and Training Team)

Visit our website: www.doh.wa.gov/wicstaff

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To submit a request, please call 1-800-525-0127 (TDD/TTY call 711)



How applicants become WIC participants

In this section we'll:

- Examine what “being eligible” means.
- Hear how we collect race and ethnicity data.
- Identify policy requirements of the Rights and Responsibility form.
- View the Certification Process.



Staff Tools provided in the Appendix:

- WIC Staff Roles
- Priorities by Category, Risk and Eligibility
- Cascades Participant Statuses
- Race & Ethnicity Information

Additional Resources:

- Washington WIC Policy and Procedure Manual: Volume 1, [Chapter 7 – Rights and Responsibilities](#)
 - Washington WIC Policy and Procedure Manual: Volume 1, [Chapter 17 - WIC Eligibility](#)
 - Washington WIC Policy and Procedure Manual: Volume 1, [Chapter 18 - Certification](#)
 - Washington WIC Policy and Procedure Manual: Volume 1, [Chapter 3 - Application and Processing Standards](#)
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A brief history of WIC

1. **View** this 26-minute video about WIC: [Saving the Children – The Story of WIC](#)
2. **Review** this brief timeline:
 - 1972 – Pilot a supplemental food program
 - 1978 – Legislation introduces a program with nutrition education, foods that must contain key nutrients, and states must offer referrals
 - 1992 – Adds an enhanced food package for breastfeeding mothers
 - 2009 – Adds new foods like, fresh fruits and vegetables, whole grains, etc.
 - 2020 – Implements Food benefit issuance by Electronic Benefits Transfer (EBT)
3. **Visit** the [National WIC Association](#) for more information about WIC.

Being a participant of WIC

WIC exists to improve the nutritional status of pregnant, breastfeeding, and non-breastfeeding postpartum adults, and infants and children under the age of five.

WIC applicants must apply for WIC in the state they live, fall within the income guidelines, and be medically or nutritionally eligible.

Examining WIC eligibility requirements

You'll often hear the phrase: WIC Works! In the WIC program, families apply because it means advantages for them, often beyond just help with their food bills. However, there are requirements that families must meet to become a WIC participant.

Activity 1 WIC Eligibility Requirements

1. Use the WIC Eligibility Requirements table on page 4 to review categorical and residency requirements for each scenario. Assume, for all the scenarios, the person calling to apply is income eligible.
2. Answer the following questions:
 - Would you make them an eligibility appointment?
 - Why or why not?
 - Based on their category, how long is their eligibility period?

Note: Cascades automatically assigns certification periods for all participant categories. The Appendix has a list of *Priorities by Category, Risk, and Eligibility*.

Determine for the following applicant scenarios:

1. Would you make an appointment for this applicant(s)?
2. Why or why not?
3. If eligible, how long is the eligibility period(s)?

Scenario	Questions to answer
<p>Shawna is newly pregnant and just moved to Washington from another state.</p>	<p><input type="checkbox"/> Make an appointment for Shawna?</p> <ul style="list-style-type: none"> <input type="radio"/> Why? _____ <input type="radio"/> Why not? _____ <p><input type="checkbox"/> If eligible, what is her eligibility period?</p> <ul style="list-style-type: none"> <input type="radio"/> _____
<p>Alexis has 3 children under age 5. She lives with her mother and is breastfeeding her 4-month-old.</p>	<p><input type="checkbox"/> Make an appointment for who in this family?</p> <ul style="list-style-type: none"> <input type="radio"/> Why? _____ <input type="radio"/> Why not? _____ <p><input type="checkbox"/> If eligible, what are their eligibility periods?</p> <ul style="list-style-type: none"> <input type="radio"/> BF mom and infant: _____ <input type="radio"/> 2 and 4 year old: _____
<p>Tom is calling to see if his wife is eligible for WIC. He's in the military and is stationed in California. His wife is pregnant and staying with her parents in Eastern Washington.</p>	<p><input type="checkbox"/> Make an appointment for Tom's wife?</p> <ul style="list-style-type: none"> <input type="radio"/> Why? _____ <input type="radio"/> Why not? _____ <p><input type="checkbox"/> If eligible, what is her eligibility period?</p> <ul style="list-style-type: none"> <input type="radio"/> _____
<p>Sean has custody of his 2 children, ages 18 months and 4 years old. He lives in Washington, the children used to live with their mother in Utah. He doesn't know if they were on WIC while living in Utah.</p>	<p><input type="checkbox"/> Make an appointment for both children?</p> <ul style="list-style-type: none"> <input type="radio"/> Why? _____ <input type="radio"/> Why not? _____ <p><input type="checkbox"/> If eligible, what are their eligibility periods?</p> <ul style="list-style-type: none"> <input type="radio"/> 18 month & 4 year old: _____
<p>Lola is a grandmother with custody of her grandchildren, ages 2 and 4. She doesn't know if they were on WIC when they were living with their mother.</p>	<p><input type="checkbox"/> Make an appointment for both children?</p> <ul style="list-style-type: none"> <input type="radio"/> Why? _____ <input type="radio"/> Why not? _____ <p><input type="checkbox"/> If eligible, what are their eligibility periods?</p> <ul style="list-style-type: none"> <input type="radio"/> 2 & 4 year old: _____

<p>Davina is a foster parent with a new 3-month-old that is in her care as of yesterday.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appointment for the baby? <ul style="list-style-type: none"> ○ Why? _____ ○ Why not? _____ <input type="checkbox"/> If eligible, what is the baby's eligibility period? <ul style="list-style-type: none"> ○ _____
<p>Toni thinks she's pregnant. Her friends said to call WIC for an appointment. Her pregnancy test is scheduled at the end of the week.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appointment for Toni? <ul style="list-style-type: none"> ○ Why? _____ ○ Why not? _____ <input type="checkbox"/> If eligible, what is her eligibility period? <ul style="list-style-type: none"> ○ _____
<p>Vanessa recently miscarried and her mom is calling to see if WIC could help. Vanessa's family is unemployed, and they could use the help.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appointment for Vanessa? <ul style="list-style-type: none"> ○ Why? _____ ○ Why not? _____ <input type="checkbox"/> If eligible, what is her eligibility period? <ul style="list-style-type: none"> ○ _____
<p>Tandy returned to work and stopped breastfeeding during the day. However, she still breastfeeds her 7-month-old at night a few times per week. Formula is expensive on her limited budget. A friend told her WIC can help.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appointment for both mom and baby? <ul style="list-style-type: none"> ○ Why? _____ ○ Why not? _____ <input type="checkbox"/> If eligible, what is her and baby's eligibility periods? <ul style="list-style-type: none"> ○ _____
<p>Henry is a father of an 8-year-old and his partner is pregnant. Henry is out of work with an injury.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appointment for who in this family? <ul style="list-style-type: none"> ○ Why? _____ ○ Why not? _____ <input type="checkbox"/> If eligible, what is her eligibility period? <ul style="list-style-type: none"> ○ _____
<p>Ti recently lost her job and has a 6-month-old who's formula fed.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appointment for Ti and baby? <ul style="list-style-type: none"> ○ Why? _____ ○ Why not? _____ <input type="checkbox"/> If eligible, what is her eligibility period? <ul style="list-style-type: none"> ○ _____

<p>Kat moved from Arizona and is living with friends. She's been in Washington 2 weeks and just learned she's pregnant.</p>	<ul style="list-style-type: none"><input type="checkbox"/> Make an appointment?<ul style="list-style-type: none"><input type="radio"/> Why? _____<input type="radio"/> Why not? _____<input type="checkbox"/> If eligible, what is her eligibility period?<ul style="list-style-type: none"><input type="radio"/> _____
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Check your answers on pages 6-9.

WIC ELIGIBILITY REQUIREMENTS	
Applicants must meet all of the following eligibility requirements:	
➤ Categorical	
➤ Residential	
➤ Income	
➤ Nutrition Risk	
➤ Categorical requirement*	
Adult	Pregnant –during pregnancy and up to 6 weeks after the birth of the baby or the end of the pregnancy.
	Non-breastfeeding Postpartum – up to six months after the birth of the infant or the end of the pregnancy.
	Breastfeeding – up to the infant’s first birthday as long as the adult breastfeeds once a day on average.
Infants	Up to the infant’s first birthday.
Children	Up to the child’s fifth birthday.
➤ Residential Requirement	
Applicants must live in the state in which they apply.	Applicants are <u>not</u> required to live in the state or near the local clinic for a <u>certain amount of time</u> .
➤ Income Requirement	
Applicants must have an income at or below WIC’s income guidelines or be determined adjunctively income-eligible based on participation in certain programs.	WIC income guidelines – at or below 185% of the Federal poverty guidelines. Adjunctive income eligibility – participation in or have certain family members who participate in an income qualifying program.
➤ Nutrition Risk Requirement	
Applicants must be seen by a Competent Professional Authority (CPA) (generally, this is the certifier or Registered Dietitian Nutritionist [RDN] in the WIC clinic) who determines whether the individual is at nutrition risk.	Nutrition risk means a medical or dietary risk that qualifies the individual for WIC. An applicant must have at least one medical or dietary risk to be eligible.

**Note: all Washington participants are eligible through the end of the month in which their eligibility ends.*

Activity 1: Answers for Eligibility Requirement Scenarios

Scenario	Questions to answer
<p>Shawna is newly pregnant and just moved to Washington from another state.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appointment for Shawna? Yes. <ul style="list-style-type: none"> ○ Why? She's pregnant and therefore categorically eligible. Participant's aren't required to live in Washington for any certain length of time. ○ Why not? _____ <input type="checkbox"/> If eligible, what is her eligibility period? <ul style="list-style-type: none"> ○ Shawna would be eligible through her pregnancy until the end of the month she's 6 weeks postpartum.
<p>Alexis has 3 children under age 5. She lives with her mother and is breastfeeding her 4-month-old.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appointment for this family? Yes. <ul style="list-style-type: none"> ○ Why? Alexis would be eligible as breastfeeding and has 3 children that are also categorically eligible. ○ Why not? _____ <input type="checkbox"/> If eligible, what are their eligibility periods? <ul style="list-style-type: none"> ○ Alexis and the baby would qualify until the baby turns a year old. The children would qualify for one year.
<p>Tom is calling to see if his wife is eligible for WIC. He's in the military and is stationed in California. His wife is pregnant and staying with her parents in Eastern Washington.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appointment for Tom's wife? Yes. <ul style="list-style-type: none"> ○ Why? She's pregnant (categorically eligible) and is living in Washington (residentially eligible). ○ Why not? _____ <input type="checkbox"/> If eligible, what is her eligibility period? <ul style="list-style-type: none"> ○ Pregnant adults are eligible through their pregnancy to the end of the month they're 6 weeks postpartum.
<p>Sean has custody of his 2 children, ages 18 months and 4 years old. He lives in Washington, the children used to live with their mother in Utah. He doesn't know if they were on WIC while living in Utah.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appointment for both children? Yes. <ul style="list-style-type: none"> ○ Why? Both children are under age 5, therefore categorically eligible. ○ Why not? _____ <input type="checkbox"/> If eligible, what are their eligibility periods?

	<ul style="list-style-type: none"> ○ Children are eligible for one year, or until they turn 5 years old.
<p>Lola is a grandmother with custody of her grandchildren, ages 2 and 4. She doesn't know if they were on WIC when they were living with their mother.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appointment for both children? Yes. <ul style="list-style-type: none"> ○ Why? Lola has custody of 2 children under age 5. ○ Why not? _____ <input type="checkbox"/> If eligible, what are their eligibility periods? <ul style="list-style-type: none"> ○ Children qualify for one year, or until they turn 5 years old.
<p>Davina is a foster parent with a new 3-month-old that is in her care as of yesterday.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appointment for the baby? Yes. <ul style="list-style-type: none"> ○ Why? New foster baby is categorically eligible. ○ Why not? _____ <input type="checkbox"/> If eligible, what is the baby's eligibility period? <ul style="list-style-type: none"> ○ The baby is under 6 months of age therefore qualifies for one year or until turning one year.
<p>Toni thinks she's pregnant. Her friends said to call WIC for an appointment. Her pregnancy test is scheduled at the end of the week.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appointment for Toni? Yes. <ul style="list-style-type: none"> ○ Why? Proof of pregnancy isn't required. Schedule an appointment, preferably after her pregnancy test. ○ Why not? _____ <input type="checkbox"/> If eligible, what is her eligibility period? <ul style="list-style-type: none"> ○ Eligibility for a Presumed Eligible participant is 2 months. ○ After the PE Complete Assessment appointment, Toni is eligible for the rest of her pregnancy through 6 weeks postpartum.
<p>Vanessa recently miscarried and her mom is calling to see if WIC could help. Vanessa's family is unemployed, and they could use the help.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appointment for Vanessa? Yes. <ul style="list-style-type: none"> ○ Why? She's a postpartum participant and categorically eligible. ○ Why not? _____ <input type="checkbox"/> If eligible, what is her eligibility period? <ul style="list-style-type: none"> ○ She qualifies until the end of the sixth month from the miscarriage.

<p>Tandy returned to work and stopped breastfeeding during the day. However, she still breastfeeds her 7-month-old at night a few times per week. Formula is expensive on her limited budget. A friend told her WIC can help.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appt for both mom and baby? No and Yes. <ul style="list-style-type: none"> ○ Why? Baby is categorically eligible. ○ Why not? Tandy is 7 months postpartum and even though she breastfeeds occasionally at night, she's outside the categorical (6 months) eligibility for non-breastfeeding postpartum. <input type="checkbox"/> If eligible, what is her and baby's eligibility periods? <ul style="list-style-type: none"> ○ The baby qualifies for 6 months (at the end of the month the participant turns 13 months old).
<p>Henry is a father of an 8-year-old and his partner is pregnant. Henry is out of work with an injury.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appointment for who in this family? Henry's pregnant partner. <ul style="list-style-type: none"> ○ Why? She's categorically eligible. ○ Why not? The 8-year-old is too old. <input type="checkbox"/> If eligible, what is her eligibility period? <ul style="list-style-type: none"> ○ She's eligible throughout her pregnancy to the end of the month when she's 6-weeks postpartum.
<p>Ti recently lost her job and has a 6-month-old who's formula fed.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appointment for baby and Ti? Yes and No. <ul style="list-style-type: none"> ○ Why? The baby is categorically eligible. ○ Why not? Ti isn't categorically eligible, since she's past 6 months postpartum and not breastfeeding. <input type="checkbox"/> If eligible, what is her eligibility period? <ul style="list-style-type: none"> ○ The baby is eligible through their first year, the end of the month they turn one.
<p>Kat moved from Arizona and is living with friends. She's been in Washington 2 weeks and just learned she's pregnant.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Make an appointment? Yes. <ul style="list-style-type: none"> ○ Why? Kat is pregnant and there's no requirement for how long you must live in WA to apply for WIC. ○ Why not? _____ <input type="checkbox"/> If eligible, what is her eligibility period?

	<ul style="list-style-type: none">○ She's eligible throughout her pregnancy to the end of the month when she's 6-weeks postpartum.
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Collecting Race and Ethnicity Information

WIC collects race and ethnicity information for statistical purposes and to assure we’re serving all eligible people in Washington state and for statistical purposes. It’s a federal law that WIC collects this information. Applicants can be assured it does not affect eligibility.

Race/Ethnicity

Declared Observed

Ethnicity ★

Race ★

- American Indian or Alaskan Native
- Asian
- Black or African American
- White
- Native Hawaiian or Pacific Islander

Review the following policy information for documenting race and ethnicity:

We require WIC Staff to ask and document race and ethnicity for all applicants at the Initial Certification and Presume Eligible (PE) appointment.	
Staff say the following statement: “WIC requires us to report race and ethnicity information. It is to learn about who WIC serves and doesn’t affect your WIC eligibility or immigration status.”	
WIC staff ask the two questions about the participant’s race and ethnicity.	<ol style="list-style-type: none"> 1. Do you consider yourself/your child Hispanic or Latino? 2. How do you describe your race/your child’s race? <p>Mark all that an applicant identifies.</p>
Document whether the information was Declared or Observed	It’s best practice and preferred to have participants self-declare race and ethnicity. Clinic staff do their best to accurately observe and document the participant’s race and ethnicity when the person refuses, or can’t, answer. (See below for more information.)
Once the information is documented it becomes part of the applicant’s record. Changes or updates can be entered as necessary; however, staff aren’t required to ask again.	
It’s up to the applicant to self-identify their ethnicity and race. Research shows that participant self-identification results in the most accurate race and ethnicity data. And is the most respectful way to obtain ethnicity and race information. However, some applicants may have difficulty in determining which race selection is right for them and may need assistance.	

For additional information about race and ethnicity – please see the Appendix.

Activity 2 Race & Ethnicity

Read each of the following and provide the answers to the questions about documenting race and ethnicity.

Check your answers on page 12; refer to the information on page 10.

1. *Marta is brand new to Washington. She moved here with her husband from Mexico. They don't speak English and have a 3-year-old son.*

Marta and her family are at their first WIC appointment. They brought in the required paperwork and it's time to ask about race and ethnicity.

- What will you document for Race and Ethnicity on the Participant Demographics screen knowing the following?
 - Marta states her son is Hispanic and they speak a native Mexican language.

2. *Catalina just moved here from Arizona. She learned she was pregnant yesterday. She's staying with friends until the end of the month.*

Catalina is at WIC for her first appointment. She has her income information and it's time to document Race and Ethnicity.

- What will you document for Race and Ethnicity knowing the following?
 - Catalina states she is Hispanic, and she used to live in Mexico with her parents. She speaks Spanish and so do her relatives.

3. *Toni doesn't know if she's pregnant, she's being tested later this week.*

Once Toni learns she's pregnant, she confirms her appointment at WIC. She just arrived at her first WIC appointment. You completed the income screening for Toni and it's time to complete Race and Ethnicity information. Toni states she doesn't want to share this information.

- What will you document for Race and Ethnicity?
 - Toni refuses to answer any questions related to race or ethnicity. She has pink hair and blue eyes. She speaks English.

Check your answers on page 12.

Activity 2: Answers Race and Ethnicity

1. *Marta is brand new to Washington. She moved here with her husband from Mexico. They don't speak English and have a 3-year-old son.*

Marta and her family are at their first WIC appointment. They brought in the required paperwork and it's time to ask about race and ethnicity.

- What will you document for Race and Ethnicity on the Participant Demographics screen knowing the following?

- Marta states her son is Hispanic and they speak a native Mexican language.

Race: American Indian or Alaskan Native

Ethnicity: Hispanic

2. *Catalina just moved here from Arizona. She learned she was pregnant yesterday. She's staying with friends until the end of the month.*

Catalina is at WIC for her first appointment. She has her income information and it's time to document Race and Ethnicity.

- What will you document for Race and Ethnicity knowing the following?

- Catalina states she is Hispanic, and she used to live in Mexico with her parents. She speaks Spanish and so do her relatives.

Race: White

Ethnicity: Hispanic

3. *Toni doesn't know if she's pregnant, she's being tested later this week.*

Once Toni learns she's pregnant, she confirms her appointment at WIC. She just arrived at her first WIC appointment. You completed the income screening for Toni and it's time to complete Race and Ethnicity information. Toni states she doesn't want to share this information.

- What will you document for Race and Ethnicity?

- Toni refuses to answer any questions related to race or ethnicity. She has pink hair and blue eyes. She speaks English.

Race: White

Ethnicity: Non-Hispanic

The Rights & Responsibilities (R&R) form

Review the following information:

You impact how applicants learn about what WIC offers them and how they become a participant of WIC. How you offer the Rights and Responsibilities form to applicants and participants makes a difference. All applicants, participants or caretakers are asked to **read** (or if they are unable to read, have read to them) and **sign** the electronic Rights and Responsibilities form in Cascades, stating they understand their rights and responsibilities while on the WIC program.

Applicants and caretakers must sign the Rights and Responsibilities form at the following appointments.

- Initial certification.
 - Presume eligible.
 - Subsequent certification.
 - Transfer into the state.
- There may be other times clinic staff ask the caretaker or participant to sign the Rights and Responsibilities.



▼ Certification Signature

Signature for _____

- Rights and Responsibilities
- Affidavit for Identity
- Affidavit for Residency
- Affidavit for Income
- Release of Information

Read and sign the electronic Rights and Responsibilities form for household members as follows:

- **One electronic signature for household members certified or transferred-in on the same day.**
- A new electronic signature for household members certified on a different day.
- A separate electronic signature for each foster child, since they're considered a separate household by federal regulation.

Verbally review the “My Rights” and “Agreement” sections of the Rights and Responsibilities with applicants, participants and caretakers at each appointment type listed above. Staff can paraphrase or use their own words to review these sections as long as you cover all the topics. The person must agree with WIC’s Rights and Responsibilities and electronically sign the form to participate in WIC.

WIC STAFF: Verbally review this page.

MY RIGHTS

- **WIC Foods:** If I qualify for WIC, I'll get a WIC Card to buy healthy foods at the grocery store. I understand WIC doesn't give all the food or formula I need for the whole month.
- **Nutrition Information:** I will get information about nutrition topics that interest me.
- **Breastfeeding Support:** WIC will help and support me with breastfeeding.
- **Health Care Information and Referrals:** WIC will let me know about immunizations, finding a doctor, and other services I might need.
- **Common Courtesy:** WIC and store staff will treat me fairly and equally, with courtesy and respect.
- **Fair Treatment:** The rules are the same for everyone regardless of race, color, national origin, sex, disability, or age.
- **Fair Hearing:** I can ask for a Fair Hearing if I disagree with a decision about my WIC eligibility.
- **Transfer Information:** I can transfer to another WIC clinic. I can ask WIC staff to give me transfer information.
- **Privacy:** My information is private. WIC only uses my information for receiving WIC services, unless otherwise indicated in writing by the clinic.

AGREEMENT

I must agree to these items to be on WIC:

- WIC staff informed me of my Rights and Responsibilities and WIC Program Rules.
- All of the information I give WIC is true. I will tell WIC staff right away if there are any changes.
- WIC staff can check my information including my household size and sources of household income.
- If I lie or hide facts to get WIC foods I may have to repay WIC the cash value of those foods.
- WIC is a federal assistance program. If I break WIC rules:
 - WIC staff can take my family off the WIC program.
 - I may be subject to civil or criminal prosecution under state and federal law.
 - WIC can share my information if I am investigated for breaking WIC rules.

By signing electronically, I agree:

- I have read, understand, and agree to the rules and agreement on this form.
- I received a copy of this form.

Providing a copy of the Rights and Responsibilities form:

- Provide the Rights and Responsibilities form in the primary language, if available, to applicants, participants, or caretakers. If no written translations are available in that language, provide the materials in English and have an interpreter or the Language Line provide the information to the person. The Language Line staff have the translations available for the languages translated for Washington WIC.
- Document in Cascades on the Family Demographics screen Sticky Note when staff provide information using interpreter, written translation, read to participant, and other.

- A blank Rights and Responsibilities form can be given to the applicant, participant, or caretaker. Print other languages from the WIC website. If the person has a copy of the form from, a previous appointment, an additional copy doesn't have to be given. The R&R is also found in the WICShopper app.
- Give the person an opportunity to ask questions or discuss concerns before signing the Rights and Responsibilities.
- Proxies can't sign the Rights and Responsibilities form.

Caretaker:

When a caretaker brings a child or infant to the subsequent certification appointment.

- Ask for a written note from the Parent Guardian authorizing the caretaker to represent her/him and ask their Caretaker to sign the R&R form.
 - Request proper identification for the person being certified/subsequently certified.
 - Ask that the Caretaker have adequate knowledge of the participant's health and eating patterns and knowledge of the participant's gross monthly income and family size.
- The caretaker must sign the Rights and Responsibility Form agreeing to follow the program rules.

Cascades Term	Definition
Parent Guardian 1 and 2	The parent guardian has custodial rights.
Caretaker	A parent guardian can designate a caretaker. A caretaker can bring infants and children to a certification appointment, receive and share nutrition education, and redeem WIC benefits for the family.
Proxy	A proxy can only redeem food benefits for the family.

Where to document the Caretaker and Proxy in Cascades

The screenshot shows the Cascades software interface for a participant named SHONDRA ROGARD. The interface is divided into several sections:

- General Information:** Includes fields for Last Name (ROGARD), First Name (JULIANN), Address (959 FRONTLINE RD), ZIP Code (98908), City (YAKIMA), State (WA), and County (YAKIMA).
- Parent/Guardian 1:** Includes fields for Last Name, First Name, M.I., Suffix, Nickname, Maiden Name, Proof of Identification, Date of Birth (5/2/2000), Marital Status, and Education Level.
- Parent/Guardian 2:** This section is highlighted with a red box and contains a dropdown menu for selecting a caretaker.
- Telephone Numbers:** A table with columns for Telephone Number, Type, Primary, Do not call, Auto Dialer, Text, and Carrier.
- Information:** Includes fields for Voter Registration, Military Status, Language Read (English), Language Spoken (English), Interpreter, Sign Language Interpreter, Email Address, and Preferred Method of Contact (Mail).
- Proxy Information:** This section is highlighted with a red box and contains a dropdown menu for selecting a proxy.
- Participant List:** A table at the bottom showing the participant's details: ID (WA0200001003), Last Name (ROGARD), First Name (SHONDRA), M.I., Suffix, Category (C), Certification End Date, Gender (Female), Date of Birth (10/10/2019), and Foster Care Entry Date.

Activity 3 Rights & Responsibilities

Read the following scenarios.

Answer the questions based on what you know about the policy and procedure for offering the Rights and Responsibilities form for applicants, participants, and caretakers to sign.

1. **Ramona** is living with her brother and his 3 young children. Ramona brings a note from her brother giving her permission to complete a subsequent certification (SC) and health assessment (HA) appointment. Ramona can also shop using the WIC benefits for the children.

Her brother's oldest child Jax is four and he's with his mom on the day of the appointment, so you make a new appointment for Jax to come back in a week. Ramona has six-month old Elijah (HA) and two-year-old Katey (SC) today for their appointment.

➤ Since all the information for the family is the same, can you include Jax on the form dated today?

➤ What should you do about an R&R for Jax?

2. **Chu** lives with her mother and her 14-month-old daughter, who needs Pediasure. Her doctor suggested applying for WIC.

Chu comes to her first WIC appointment and needs an interpreter. Even though the R&R forms come in several languages, her language isn't available.

➤ What is documented on the Sticky Note about the interpreter?

➤ Why is it important to collect this information on the form?

➤ Chu's mother is at the appointment also and she wants to help with the shopping while Chu is in school. Where is this information documented?

3. **Simon** has custody of his daughter. He's bringing 8-month-old Alex in for her first appointment. He's in a hurry since he is on his lunch and needs to get back to work.

➤ What information is shared verbally with Simon?

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- Simon asks what he needs to do if he can't bring Alex to her WIC appointment, but his babysitter could.
- Who would sign the R&R if someone other than Simon brought Alex to the subsequent certification appointment?

Check your answers on pages 18-19.

Activity 3 Answers – Rights and Responsibilities

1. **Ramona** is living with her brother and his 3 young children. Ramona brings a note from her brother giving her permission to complete a subsequent certification (SC) and health assessment (HA) appointment. Ramona can also shop using the WIC checks for the children.

Her brother's oldest child Jax is four and he is with his mom on the day of the appointment, so you make a new appointment for Jax to come back in a week. Ramona has six-month old Elijah (HA) and two-year-old Katey (SC) today for their appointment.

- Since all the information for the family is the same, can you include Jax on the form dated today?

No. The R&R is filled out for the family members applying and/or having a subsequent certification on the same day.

- What should you do about an R&R for Jax?

Jax will have a separate R&R completed when he comes in for his certification at a later date.

2. **Chu** lives with her mother and her 14-month-old daughter, who needs PediaSure. Their doctor suggested applying for WIC.

Chu comes to her first WIC appointment and she needs an interpreter. Even though the R&R forms come in several languages, her language isn't available.

- What is documented on the Sticky Note about the interpreter?

Document on the Family Demographics Sticky Note, that the information was provided by an interpreter.

- Why is it important to collect this information about form?

If there were problems that needed to be reviewed, the state WIC staff would ask to see the signed R&R form. It's important information for investigators to know if the information was provided by an interpreter.

- Chu's mother is at the appointment also and she wants to help with the shopping while Chu is in school. Where is this information documented? *Chu's mother can be added as a proxy on the Family Demographics screen (right hand side).*

3. **Simon** has custody of his daughter. He's bringing 8-month-old Alex in for her first appointment. He's in a hurry since he is on his lunch and needs to get back to work.

- What information is shared verbally with Simon?

Staff review verbally the information in the My Rights and Agreement section of the R&R.

- Simon asks what he needs to do if he can't bring Alex to her WIC appointment, but his babysitter could.

Simon can add the babysitter as a Caretaker.

- Who would sign the R&R if someone other than Simon brought Alex to the certification or sub certification appointment?

Anyone added as a Caretaker can do the certification or sub certification appointments. The Parent Guardian gives permission for another person to complete these

appointments by requesting in person, verbally over the phone or writing a note. The person should have knowledge about the participant's family income and health issues.

WIC applicants are certified before they receive benefits.

There are many steps before an eligible participant leaves with benefits. Each person working in the clinic has a part in the certification process and/or provides a WIC service to the participant while they are eligible. These are the roles you'll continue to learn about as you complete training.

STEPS TO A CERTIFICATION	
1.	Applicant is greeted and documentation is gathered.
2.	The participant record is started or updated in the computer.
3.	Documentation is assessed for eligibility.
4.	Race and ethnicity information is completed.
5.	Rights & Responsibilities form is read and signed.
6.	The Assessment Questions are completed & height, weight, and hemoglobin is taken.
7.	A medical or nutrition risk is assigned to establish eligibility.
8.	A nutrition education topic is discussed and documented.
9.	Breastfeeding is discussed with all pregnant women.
10.	Community referrals are provided as appropriate.
11.	A WIC Card is given, and foods are prescribed and issued.
12.	A plan for types of future appointments is made for the rest of the eligibility period.
13.	Food and WIC Card education is provided, and the next appointment is made.
14.	The participant leaves with a WIC Card for healthy foods in hand.

Share one key point you've learned during this section:

Review the Appendix for information about eligibility, race, ethnicity, computer passwords, staff roles and other questions about Getting Started in WIC.

Appendix

Reference

WIC Staff Roles

WIC services are **provided** by a team of knowledgeable and caring staff. Clinic staffing patterns and job descriptions may vary by agency; however, there are some defined **key roles** for WIC staff.

1. **Clerks** are the frontline staff whose roles vary by clinic. The clerk gathers and assesses the required proofs (income, ID, residency) from the participant before the CPA sees the applicant.
 - The clerk may be responsible for answering the phones, appointment scheduling, benefit issuance, WIC card education, providing referrals, and maintaining clinic flow.
 - In some locations, the clerk may also do breastfeeding and nutrition education.
2. **Competent Professional Authority (CPA) or Certifier** is a qualified health professional or has met the competencies to be a paraprofessional.
 - The CPA assures all eligibility requirements are met and determines the nutrition risk that makes a participant eligible to receive WIC services.
 - The CPA prescribes WIC foods, offers nutrition education and breastfeeding promotion and support.
 - The CPA makes referrals based on the needs of the family
 - The CPA determines the types of appointments needed to follow the certification or sub certification appointment.
3. **Coordinators** manage the contract with the State WIC office. The coordinator has various responsibilities depending on the clinic and the agency.
 - Some coordinators provide direct services with participants and some perform only administrative duties.
4. **Breastfeeding Coordinators** are the point of contact for the State Breastfeeding Promotion Coordinator.
 - The Breastfeeding Coordinator assures the clinic has a breastfeeding friendly environment and coordinates activities that promote breastfeeding.
 - The Breastfeeding Coordinator may also be the breastfeeding specialist in the clinic and may write and follow through with special breastfeeding projects.
5. **Peer Counselor Leads** are the point of contact for the state staff. They assure peer counselors are well trained and supervised.
 - Oversees the day-to day peer counselor supervision.
 - Assists and encourages all WIC staff to promote peer counselors.
6. **Peer Counselors** offer basic breastfeeding information and support to pregnant and breastfeeding adults.
 - Peer counselors help prevent and handle common breastfeeding concerns.

Reference

- They attend and assist with prenatal classes, breastfeeding support groups, and contact all pregnant and breastfeeding adults assigned to his/her caseload.
7. **The WIC Registered Dietitian Nutritionist (RDN)** provides high risk nutrition counseling based on participant needs.
- Develops the high risk care plan and may also provide certifications as the CPA.
 - Works with the WIC Coordinator to assure quality nutrition services are provided in the clinic.

Reference

Priorities by Category, Risk and Eligibility

Priority	Category	Nutrition Risk	Length of Eligibility
1	Pregnant	Medical	End of month participant turns 6 weeks postpartum
1	Breastfeeding	Medical	1 year or through the month of the baby's 1 st birthday
1	Infants < 6 months of age	Medical	1 year or through the month of the baby's 1 st birthday
1	Infants > 6 months of age	Medical	6 months through the end of the month
2	Infants < 6 months of age	Born to WIC eligible mothers	1 year or through the month of the baby's 1 st birthday
3	Children	Medical	1 year
4	Pregnant	Non-medical	End of month participant turns 6 weeks postpartum
4	Breastfeeding	Non-medical	6 months or through the month of the baby's 1 st birthday
4	Infants > 6 months of age	Non-medical	6 months through the end of the month
5	Children	Non-medical	1 year
6	Non breastfeeding postpartum	Medical or Non-medical	End of month participant turns 6 months postpartum
7	Previously Certified Women, Infants, and Children	To prevent regression*	6 months

*Priority 7 is not currently being used for certification in Washington but women and children who transfer in with priority 7 will be provided with WIC services until eligibility ends date or until sub certification is established with a priority other than 7.

Reference

Cascades Participant Statuses

Statuses	Definition
Applicant	<p>A potential participant, not yet certified, but the basic demographic information has been entered into the system.</p> <p>The applicant's basic demographic information is entered and saved in Cascades, such as the name, birthdate, address and category. They have not been certified.</p> <ul style="list-style-type: none">➤ Benefits may not be issued.
Applicant (Presumed)	<p>A pregnant participant is not yet certified but is presumed to be eligible until the certification is completed. The applicant status for a presumed participant ends the last day of the month in which the 60th day falls.</p> <ul style="list-style-type: none">➤ Benefits may be issued to presumed pregnant women.
Application Expired	<p>A participant who is 1-31 days past their eligibility period. Example is the child under 5 who has passed the "Certification Expired Date" and has not been recertified.</p> <ul style="list-style-type: none">➤ Benefits may be issued for the participant with this status.
Active/Certified	<p>Participant has been determined to be income and risk eligible and has a current certification period.</p> <ul style="list-style-type: none">➤ Benefits may be issued to active participants.
Certification Expired	<p>A participant who is beyond their period of eligibility or is no longer participating at your clinic and does not have any other status.</p> <ul style="list-style-type: none">➤ Benefits may not be issued.
Terminated	<p>The participant has been Terminated for a specific reason on the Certification Summary screen in Cascades.</p> <ul style="list-style-type: none">➤ Benefits may not be issued to Terminated participants.
Application Ineligible	<p>Participant is over 5 years old.</p> <ul style="list-style-type: none">➤ You will not see this status very often. It was used during migration. Benefits may not be issued until the sub certification is completed.

Appendix

RACE AND ETHNICITY INFORMATION

Which WIC participants would identify from the American Indian or Alaska Native selection list?

Participants who are American Indians from Mexico, Central or South America and maintain a tribal affiliation or community attachment should self-report the category “American Indian or Alaska Native”. For example: A participant from Mexico who speaks a native Mexican language and identifies with the indigenous (original) people of the region or a specific tribe.

➤ The specific tribe the person is affiliated with does not need to be documented.

The screenshot shows a form titled "Race/Ethnicity". At the top left, there are two radio buttons: "Declared" (selected) and "Observed". To the right, there is a dropdown menu for "Ethnicity" with a star icon, currently set to "Non-Hispanic". Below this, there is a section for "Race" with a star icon, containing five checkboxes: "American Indian or Alaskan Native" (checked), "Asian", "Black or African American", "White", and "Native Hawaiian or Pacific Islander".

Examples of who this might apply to include:

- A participant from Peru who maintains a tribal affiliation or community attachment to the original/indigenous peoples.
- A participant from Mexico who speaks a native Mexican language and identifies with the indigenous (original) people of the region or a specific tribe.

What race category should participants from Mexico select?

It is up to the participant to self-identify their ethnicity and race. Research shows that participant self-identification results in the most accurate race and ethnicity data and is the most respectful way to obtain this information. However, some participants may have difficulty in determining which race selection is right for them and may need assistance.

Information from FNS suggests that when a participant is from Mexico and does not maintain a tribal affiliation or community attachment to the indigenous peoples, it is likely that the participant will select white or black to reflect his/her race. Of course, any of the other race selections could apply to the participant as well.

Note: Some WIC staff may feel uncomfortable about asking the required Race/Ethnicity questions. Most participants have been asked these questions before coming to WIC. Participating in WIC does not make a person a public charge and does not affect immigration status.