Guidelines for Using the WIC Worksheets

The WIC Worksheet is a paper copy designed to guide staff in recording information for WIC Certifications, Health Assessments and other appointments when the WIC computer system is unavailable. Staff use the categorically designated worksheet to gather client information. When the computer system is operating again, staff enter information recorded on the worksheet into the computer. The format of the worksheet closely follows the screens and tabs on the computer. **Once the information from the worksheet is entered into the computer, staff destroy the paper copy by following the agency's policies for disposing client information.**

When to use a paper worksheet:

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

How to use the WIC Worksheet:

1. **Select** the WIC Worksheet for the client category.
2. **Record** Date Service Provided (date contact occurred)
3. **Check type of contact** (wizard) being completed or write in "other" contacts (e.g. 2C).

Pre-screen	**PE -** Presumed Eligible	**EN –** Enroll New Infant	**NC –** New Certification	**CC -** Complete Certification	**RC -** Recertification	**HA -** Health Assessment

4. **Demographics Tab:** Complete the information. Be sure to record the caregiver/client's phone number to schedule a future appointment once the computer is available. "PHONE" is in all capital letters on the WIC Worksheet to bring staff's attention to the importance of documenting an accurate telephone number.
5. **Race/Ethnicity**: For new clients, race/ethnicity <u>must</u> be documented to be able to enter other client information into the computer (e.g. certification data).
6. **Income:** Document the most recent income information. View proofs of income, ID, residency, and pregnancy (if applicable) and document as appropriate.
7. **Custom Tab**: Document feeding status, dates, anthropometrics, medical providers and/or breastfeeding information, depending on client category.
8. **Measures**: Record weight, measurements, hemoglobin and dates collected. Document relevant notes about the weights, measurements or hemoglobin. For example, "Hgb. from MD on 12-12-08."
9. **Assessment:** Use paper copy of the Assessment Questions to identify client's risk factor(s). Document risks on the Assessment Questions paper copy for each client and attach questions to the WIC Worksheet.
10. **Nutrition Education**: Record topics discussed and handouts provided to client.
11. **Referrals –** Document referrals provided or follow-up.
12. **Streamlined Basic Contact**: Identify Basic Contact items completed and Voter Registration status. All uncompleted Basic Contact items will need to be addressed at the next appointment with the client.

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13. **Food Package**: Identify for PG form only; other categories food packages are identified by what is entered as feeding status on the Custom Tab.
14. **Notes:** Make notes or comments.
15. **Signature** - Staff sign the form. (sign for a P-CPA)

For providing checks to clients, please refer to the policy in Volume I, Chapter 22, **Issuing WIC Checks when Computer Systems are Down or During an Emergency.**