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## Required Guidance: Presume Eligible (PE) Remote Certification

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Staff must offer both in person and remote presume eligible appointments to pregnant applicants who are income eligible and let the person decide which option they prefer.

As part of the American Rescue Plan Act (ARPA) policy waivers allowed by the Food and Nutrition Service (FNS), this policy is in effect from September 1, 2023 until September 30, 2026.

When providing a remote presume eligible appointment, staff must:

1. Complete the presume eligible certification using an agency landline phone, agency cell phone or secure interactive video chat.
  - Check with your IT staff or staff at the state WIC office about what electronic methods meet the definition of a secure video chat.
2. Use an interpreter for the contact when bi-lingual staff aren't available to interpret for a participant with Limited English Proficiency (LEP).
  - Document the use of an interpreter service in the participant's file.
  - See the "Use and Interpreter" policy in [Volume 1, Chapter 11 – Assessment](#) for more information.
3. Complete the required elements of the presume eligible appointment as listed in procedure below.
  - Proof of identification, residency and income eligibility are required.
4. Staff must complete the Presume Eligible – Complete Assessment within 60 days.
  - Best practice is to complete the assessment the following month.
5. The participant can receive a maximum of two months of food benefits.
  - If the participant is missing any proofs, provide a one-month temporary certification.
  - Complete the assessment and document the missing proofs the following month.

**Note:** When providing an in-person presume eligible appointment, follow the “Components of the Presume Eligible Certification” policy in [Volume 1, Chapter 18 - Certification](#).

**PROCEDURE:**

Staff:

- A. Determine if it’s better to presume eligible or complete the full certification.
  - It’s best practice to complete the full certification for a pregnant participant who will deliver soon instead of presuming eligible, unless it’s the only way to get the person on the program and issue food benefits for that month.
- B. When making the presume eligible appointment inform the person you’ll need to see documentation of identification, residency, and income. Offer the following options:
  - a. Share a ProviderOne number and staff verify it returns a positive result.
  - b. Mail the documents to the clinic. Inform the person you’ll shred these documents after viewing and that WIC doesn’t keep copies.
    - File documents securely until entered in Cascades, then shred immediately after use.
  - c. Have the documents ready to show staff if the person agrees to a secure video chat appointment.
  - d. Send copies using an encrypted email or fax. Inform the person you’ll shred hard copy documents after viewing and that WIC doesn’t keep copies.
  - e. Bring the documents to the clinic prior to the appointment.
- C. During the presume eligible appointment give a brief description of the program and certification process.
  1. Let the participant know the information is confidential and approximately how long the appointment will take.
  2. It’s best practice to let the participant know you’ll ask questions about potentially personal information so they can decide if they’re in an area where they can answer these questions.

3. It's also helpful to let participants know staff will enter the information into a computer so they're aware of what is occurring during this interaction.
- D. Document all required information on the participant's **Family Demographics** screen.
1. Select the proof shown for identity and residency when the applicant provided it prior to or during the presume eligible appointment using one of the options in Procedure B.
  2. Staff select "Not Provided" when staff didn't see the person's proof(s) prior to or during the presume eligible appointment.
    - Selecting "Not Provided" gives the participant a one-month temporary certification for missing proof of identification and/or residency.
  3. Follow the "Participants with No Proof of Identity or Residency" policy in [Chapter 18 – Certification](#) when proof of identity or residency doesn't exist.
    - Review the [No Proof of Identity Form \(Affidavit for Identity\)](#) and/or the [No Proof of Residency Form \(Affidavit for Residency\)](#) with the participant.
    - Ask if the participant has any questions and if they agree to the information on the form.
    - If the person agrees, write "Read to/ppt agreed" then sign your initials in the **Certification Signature** box.
  4. Ask the person if they would like information about registering to vote or changing their voter registration address.
    - Document the person's voter registration status.
    - Offer to mail a stamped voter registration form, or a link to the online registration form when the person is interested in registering to vote. [Register to Vote in Washington State - Elections & Voting - WA Secretary of State](#).
- E. Select the "Presumed Eligible" risk on the **Assigned Risk Factors** screen.
- F. Document the required information on the **Participant Demographics** screen.
1. Document participant identification on the Participant Demographics screen if not entered on the Family Demographics screen when adding the participant.

2. Race/Ethnicity – select the participant’s race and ethnicity based on their declared information.
3. Physical Presence – select “No” and select the Physical Presence Exception Reason “Remote Appointment.”

G. Complete the **Income Information** screen to assess income eligibility.

1. Family size – enter the number in the economic unit and the number of expected infants.
2. Family Adjunct Participation – enter information and proof seen.
  - Verify adjunctive eligibility and enter the estimated Self-Declared income from the past 30 days.
3. Income Details – enter information if the participant **doesn’t have** adjunctive eligibility.
  - a. Select the proof of income seen prior to, or during the presume eligible appointment.
  - b. Select “Not Provided” for proof of income when the participant didn’t provide proof of income prior to or during the presume eligible appointment.
    - Selecting “Not Provided” gives the participant a one-month temporary certification for missing proof of income when the self-reported amount is income eligible.
  - c. Complete the [Temporary Certification for Missing Proof of Income form](#) when selecting “Not Provided” for proof of income.
    - 1) Fill in the income information reported by the participant.
    - 2) Verbally share the following information from the form:
      - I understand WIC is giving me 1 month to bring in proof of my household income.
      - The proof must show I am income eligible for WIC to continue receiving WIC benefits.

- The household income I'm reporting is true and correct to the best of my knowledge.

3) After the participant agrees, write "read to/ppt agrees" then place your initials on the signature line of the form.

4) Scan the form into Cascades from the Income Information screen.

**Note:** Staff have the option to send a link to the form to the participant.

4. Follow the "No Proof of Income" policy in [Volume 1, Chapter 6 – Income](#) when the person has zero income, or proof of income doesn't exist.

- Review the [Statement of Income Form \(Affidavit for Income\)](#) with the participant.
- Ask if the participant has any questions and if they agree to the information on the form.
- If the person agrees, write "Read to/ppt agreed" then sign your initials in the **Certification Signature** box.

5. Provide the "Not Eligible" letter if the person isn't income eligible for WIC and provide referrals to other social and health services.

H. Complete the Rights and Responsibilities form.

1. Ask the participant if they have access, by phone or on a computer, to read the [Rights and Responsibilities form](#) on the Washington WIC website, **or** read the entire form to the participant.

- Direct the participant to the [Rights and Responsibilities form](#) in their language, read the form to the person in their language, or ask the interpreter or Language Line staff to read the form to the person in their language.

2. Once the participant has read or had the Rights and Responsibilities form read to them, verbally review the required information on the form and ask if the person has any questions and if they agree.

- See [Volume 1, Chapter 7 – Rights and Responsibilities](#) for more information about the required review.

3. If the participant agrees to the Rights and Responsibilities, click **Capture Signature** and write “Read to/ppt agreed” then sign your initials in the **Certification Signature** box.
- I. Review the information on the **Certification Summary** screen and if the information is correct, press the **Certify** button.
  - J. Issue the WIC Card.
    1. Swipe the WIC Card or enter the WIC Card number on the **Issue EBT Card** screen.
  - K. Prescribe food benefits.
    1. A clerk or non-CPA staff can issue the standard food prescription for the presumed eligible participant.
    2. If the CPA completes the Presume Eligible certification, they can discuss and make changes to the food prescription.
    3. The CPA reviews the food prescription at the PE – Complete Assessment.
  - L. Issue food benefits.
    1. Issue food benefits for either one or two months based on required documentation.
    2. Staff sign for the food benefits and write “RBI” (Remote Benefit Issuance) and their initials.
  - M. Provide WIC shopping education and information about how to use the WIC Card.
    1. Ask if the participant can download and view the [WIC Shopping Guide](#) on the WIC website to see the foods while staff review them on the phone or during the video chat.
    2. Encourage the participant to consider downloading the WIC Shopper App.
  - N. Offer to mail the WIC Card or have the participant pick the card up at the clinic.
    1. Let the participant know the card may take 5 – 7 days to arrive by mail.
    2. If the participant prefers staff mail the card:

- a. Confirm the address in the participant's file is correct.
  - b. Offer a Shopping List, Shopping Guide, and other WIC Card materials as needed.
    - Delete all shopping lists from the Downloads folder after generating reports or printing a Shopping List in Cascades.
  - d. Send the card and the Mailed Card Letter in the participant's language. The letter is available on the [WIC Policies and Procedures page](#).
- O. Schedule the next appointment:
1. Schedule the next appointment to complete the assessment, either in 30 or 60 days.  
**Note:** Schedule within 30 days for participants with missing proof of ID, residency, or income.
  2. Let the person know what to provide at (or before) the next appointment, for example missing proofs, current measurements, or iron test results.
  3. Ask if the participant has had any health care appointments recently or will have an appointment prior to the Presume Eligible - Complete Assessment appointment.
    - a. Provide the [Measurement and Bloodwork Information Form](#) link to the person so the health care provider can document measurements and bloodwork values.
    - b. Ask the person to access their electronic health record or have an after-visit summary on hand during the appointment and verbally share the measurements and bloodwork values.
- P. Thank the participant for participating in WIC and offer a phone number for questions.
- Q. Document the presume eligible appointment and nutrition education according to the "[Nutrition Education at the Initial and Subsequent Certification an Presume Eligible Complete Assessment](#)" policy in the participant's Individual Care Plan.
  - Title the Care Plan note as "Remote Presume Eligible."

DRAFT

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