

## WIC Clerk/Technician Observation Tool 2015

<b>Staff:</b>	# Indicates step needed for I and C-EVAL										
<b>Reviewer:</b> 1. 2. 3.	<b>Date:</b> 1. 2. 3.										
<b>Client Category:</b>											
<b>Family Number:</b>											
<b>Client Certification: #Review if I or C-Eval observed</b>											
#Welcome, introduction and summary of services?	+	-	NA		+	-	NA		+	-	NA
#Family information & proxy is updated?	+	-	NA		+	-	NA		+	-	NA
#Non-English speaker is offered translation services?	+	-	NA		+	-	NA		+	-	NA
Client agreement is read by/to client in their own language?	+	-	NA		+	-	NA		+	-	NA
Client is notified of illegality of dual enrollment.	+	-	NA		+	-	NA		+	-	NA
<b>(Initial Cert)</b> Client is given a copy of Client Agreement after review.	+	-	NA		+	-	NA		+	-	NA
Client is offered copy of Client Agreement after review. <b>(All subsequent certs/recerts)</b>	+	-	NA		+	-	NA		+	-	NA
<b>Adjunct Eligibility data collection</b>											
Authorized person asked about Medicaid, SNAP, FIP?	+	-	NA		+	-	NA		+	-	NA
• If yes, is this verified? (one program/person)	+	-	NA		+	-	NA		+	-	NA
Family size reviewed?	+	-	NA		+	-	NA		+	-	NA
Last 30 day Income documentation is reviewed? (Verbal declaration allowed if adjunct, migrant, homeless, cash, no income) Can use last tax return/1040 if variable Income.	+	-	NA		+	-	NA		+	-	NA
Language, Residency and Identity (ID-NEW ONLY) verified for Authorized person and clients?	+	-	NA		+	-	NA		+	-	NA
Migrant/homeless receive special income/residency/termination policies?	+	-	NA		+	-	NA		+	-	NA
• "No proof" attestation form used appropriately?	+	-	NA		+	-	NA		+	-	NA
Short cert process used appropriately? (Income 30 days, Residency & ID, Proof of Pregnancy 60 days)	+	-	NA		+	-	NA		+	-	NA
USER ID in status bar matches staff person?	+	-	NA		+	-	NA		+	-	NA
<b>Voter Registration: #I-Eval, C-Eval, if address change only</b>											
Offered using MI-WIC script?	+	-	NA		+	-	NA		+	-	NA
Voter Registration verified with Photo ID (no copy needed) or if no photo ID: Affidavit completed by client, signed by staff, and attached to voter registration form.	+	-	NA		+	-	NA		+	-	NA
Declination form signed if not registering or not eligible to register? Keep for 24 months.	+	-	NA		+	-	NA		+	-	NA
<b>Race/Ethnicity</b>											
Are new clients asked using the MI-WIC screen script to identify their own race(s)/ethnicity?	+	-	NA		+	-	NA		+	-	NA
Do staff record race/ethnicity observations if client declines?	+	-	NA		+	-	NA		+	-	NA
<b>Physical Presence:</b>											
Is the applicant present or not present for allowable reason and this documented?	+	-	NA		+	-	NA		+	-	NA
Are infants under 8 weeks of age allowed to be enrolled without being present?	+	-	NA		+	-	NA		+	-	NA
<b>Notes:</b>											

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<b>#Length (0 – 24 months):</b>											
Is one person holding head while other gently holds both knees down and pushes heels against footboard?	+	-	NA		+	-	NA		+	-	NA
Repeated until confirmed within 2/16”?	+	-	NA		+	-	NA		+	-	NA
Recorded in inches then convert to 1/16 “?	+	-	NA		+	-	NA		+	-	NA
<b>#Weight (0 – 24 months) Do Not remove child from scale unless re-weigh feature demands</b>											
Scale zero-balanced prior to weighing w/diaper and sheet?	+	-	NA		+	-	NA		+	-	NA
Child weighed with dry diaper, sheet and T-shirt only?	+	-	NA		+	-	NA		+	-	NA
Repeated until confirmed within 1 oz (zero-balanced if digital)?	+	-	NA		+	-	NA		+	-	NA
Recorded immediately?	+	-	NA		+	-	NA		+	-	NA
<b>#Head Circumference (0-24 months):</b>											
Measurement taken with tape above eyebrows?	+	-	NA		+	-	NA		+	-	NA
Repeated until confirmed?	+	-	NA		+	-	NA		+	-	NA
Recorded immediately in inches and 1/16th inch?	+	-	NA		+	-	NA		+	-	NA
<b>#Height/Weight (&gt;24 months or woman): don't remove client from scale unless re-weigh feature demands</b>											
Ht & Wt - No shoes, scale covered with paper?	+	-	NA		+	-	NA		+	-	NA
Ht - Heels, buttocks, and shoulders against wall, legs straight?	+	-	NA		+	-	NA		+	-	NA
Ht - Eyes straight ahead?	+	-	NA		+	-	NA		+	-	NA
Wt – scale zero-balanced prior to weighing, if needed?	+	-	NA		+	-	NA		+	-	NA
Repeated until confirmed within ¼ pound and 2/16 <sup>th</sup> inch?	+	-	NA		+	-	NA		+	-	NA
Measurements recorded immediately?	+	-	NA		+	-	NA		+	-	NA
<b>#Measurement not taken or not taken according to Policy:</b>											
• Cannot be taken, is “unk” v’d & reason noted?	+	-	NA		+	-	NA		+	-	NA
• Not according to policy is “?” v’d & reason noted?	+	-	NA		+	-	NA		+	-	NA
<b>#Lab: (Policy 2.15)</b>											
Immunization assessed ( I, C1-4), referral made if not up to date?	+	-	NA		+	-	NA		+	-	NA
Lead screening assessed. Referred or tested if no lead test?	+	-	NA		+	-	NA		+	-	NA
Staff prepares supplies on a fresh drape/tissue for each client?	+	-	NA		+	-	NA		+	-	NA
Staff washes hands before gloving (sanitizer allowed)?	+	-	NA		+	-	NA		+	-	NA
Client/AP asked about bleeding problems or latex allergy?	+	-	NA		+	-	NA		+	-	NA
Tech wears gloves?	+	-	NA		+	-	NA		+	-	NA
Client’s skin cleaned well before poke?	+	-	NA		+	-	NA		+	-	NA
Are first TWO drops of blood wiped away?	+	-	NA		+	-	NA		+	-	NA
Blood collected without “milking”?	+	-	NA		+	-	NA		+	-	NA
Is danger of band-aid/choking addressed?	+	-	NA		+	-	NA		+	-	NA
Blood results documented into MI-WIC and Log?	+	-	NA		+	-	NA		+	-	NA
Is retest done according to policy, if required.	+	-	NA		+	-	NA		+	-	NA
Referral Data used according to Policy	+	-	NA		+	-	NA		+	-	NA
Are test results recorded immediately?	+	-	NA		+	-	NA		+	-	NA
Staff washes hands after glove removal (sanitizer allowed)	+	-	NA		+	-	NA		+	-	NA
Does staff thank client & tell them next step w/ CPA? (Staff directs client to the next step of the WIC process?)	+	-	NA		+	-	NA		+	-	NA
<b>2 things I learned from this observation:</b>	1.					2.					
	1.					2.					
	1.					2.					
<b>2 suggestions for improvement:</b>	1.					2.					
	1.					2.					
	1.					2.					

Thanks to Monroe County WIC!