

Michigan WIC Clerical Competency Checklist

WIC Employee Name: _____ Date _____

Clerical Assessment	Yes	No	N/A	Notes / Recommendations
Does staff establish rapport with client?				
Does staff do a statewide search on a new or transfer client to prevent dual enrollment?				
MI-WIC Family Screens				
Does staff ask if client is having trouble with EBT card at the store?				
Are all new clients informed about proxy availability and responsibilities?				
At each certification and recertification, is the proxy designation updated as needed?				
Is current address and phone information verified?				
Is family size and number of expected infants reviewed at each certification/recertification?				
Adjunct Eligibility- Is authorized person asked about <i>Medicaid</i> (Healthy Kids/ Healthy MI Plan) eligibility for each client?				
Adjunct Eligibility- Is Medicaid eligibility verified through use of MI-WIC, MI Health Benefits, CHAMPS, MCIR or other confirmation?				
Adjunct Eligibility: Is <i>SNAP/FS or FIP</i> enrollment asked for each client?				
If used, is SNAP or FIP enrollment verified by Bridge Card for family eligibility? (At least, verify one program's eligibility.)				
Is family income calculated using past 30 days of pay documentation? (exception: adjunct eligibility, migrant, homeless, works for cash, or no income)				
Is foster child, enrolled as a family of one (1) using the "foster" dropdown?				
Is Primary Language and Translator Required documented correctly?				
Is Proof of Residency documented correctly?				
Voter Registration- Is voter registration offered at every certification and recertification and change of address?				
Voter Registration - Does staff check acceptable photo ID for clients who register to vote?				
Voter Registration- Are clients without acceptable ID asked to sign an "Affidavit of Voter Not in Possession of Picture Identification?"				

Voter Registration – Is the affidavit sent to City/Township/County office, if signed along with the registration?				
Voter Registration - Are clients who are already registered to vote required to sign a declination form at each cert?				
Is identity confirmed and documented in MI-WIC for all Authorized Persons?				
Is Migrant status documented correctly?				
Is Homeless checked, if appropriate?				
Client Agreement- Is the WIC Client Agreement read by or read to the client in a language they understand and signed at initial certification and reviewed and signed by the authorized person at recertification?				
MI-WIC Client Information Screens	Yes	No	N/A	Notes / Recommendations
New Client – Is identity physically confirmed and documented for all new clients?				
Is Proof of Pregnancy requested (as applicable) and documented correctly?				
Is Education Level and Marital Status asked (as applicable) and documented correctly?				
For breastfed infants, is the Mother’s ID documented?				
For Ineligible Client, is the Reason for Ineligibility documented? Is the Notice of Ineligibility provided?				
Ethnicity/race- Are clients asked the questions regarding ethnicity/race from the screen? (Initial cert only)				
Ethnicity/race - If the client declines to state their ethnicity/race, does the WIC staff record their observations, notifying the client of this?				
Cert Action Screen				
Is the client present or not present documented correctly?				
Does the staff assign client category (PG, NPP, BE, BP, IBE, IBP, IFF) based on verification (i.e., proof of pregnancy, hospital information or client validation)?				
Short Cert- Did staff use the short cert process if no proof of Residency, ID (initial cert only), Income or pregnancy is provided, and proof exists?				

Initial Visit	Yes	No	N/A	Notes / Recommendations
During the initial clinic visit or transfer into Michigan, was the applicant, client, or proxy notified about:				
▪ Where to use the WIC benefits/Vendor listing				
▪ Use of WIC Food Guide/Infant Formula Insert				
▪ VOC for ID or transfer				
Print Docs Provided				
Shopping List (with next appointment notification)?				
NE Plan provided at each cert/recert/infant or child evaluation? (required)				
VOC that has LA staff name and signature? (can be stamp)				
Referral letter printed, if applicable?				
Copy of signed Client Agreement given, if new to WIC including an infant or offered if previous client?				
Short Certification Notice given, if applicable?				
WIC Vendor List given, if new to clinic?				
Appointments	Yes	No	N/A	Notes / Recommendations
Are the correct appointments scheduled for clients?				
If appointments are not available for new and existing clients within the required time frames, is the WIC Coordinator alerted?				
Is the Pregnant, Breastfeeding Woman, Infant, Homeless, Migrant (High Priority) client provided appt within 10 calendar days?				
Is the Child, Non-Lactating Woman, Transfer client provided appt within 20 days?				
Are ISD (Integrated Service Delivery) Referrals contacted or attempted within 2 business days? (review clinic/scheduler/Incoming Referral Work Queue for New Referrals)				
Are clients on the ISD Referral Work Queue scheduled within the required timeframes for category?				
Is Nutrition Education documented- wichealth.org/mall/classes according to LA procedure?				

Other	Yes	No	N/A	Notes / Recommendations
Food Guide- Did staff notify clients of changes in the WIC Food Guide and/or Infant Formula Insert and provide materials as indicated?				
Are benefits issued appropriately and no more than 3 full months of benefits at a time?				
Can staff navigate EPPIC/EBT MIS?				
Does staff issue and document EBT card correctly?				
Other Reports pulled and follow-up completed (as assigned):				

Assessment administrated by: _____ Title: _____

Comments: