

Summary of 2020 ME Tool Changes

Active Record Review

Page 1 Instructions

-Added for Role Reports/Credentials/Training: Review 20% of randomly selected staff (minimum of 5 staff) if training requirements are met. Review 2 staff for certificates/documentation.

Removed- 'or High Risk Care Plan Closed or Not Needed' reference report'

Page 2 Changed wording to reflect new MI-WIC screens: NE Plan to NE Method, removed NE pop up as everything will be on the 1st NE screen, and Previous NE with follow-up date, Initials and Eval rather than Note

-Follow-up NE documentation—clarify when required i.e. recert, evals

Breastfeeding documentation

Removed: (BF Contact or BF Aids and Notes)

Clarified: BF follow-up to PC/IBCLC documented and within timeframes?
PG, BE/IBE, BP/IBP

Page 4 Role Reports *and Trainings* added on heading

In LA Staffing Removed: Nutrition Educator (non-CPA)

Added Training requirements to Role reports review

Added 3.1i and language:

-Are all staff trainings documented on a log equivalent to 1.07A?

-Have staff completed required trainings and within required timeframes?

(Review 20% of staff (min. 5 staff))

staff completed all trainings _____ ÷ Total # staff reviewed _____ = _____

(cite ≤85%)

Note: Including ongoing nutrition and breastfeeding edu 4X/year

Added: Review 2 staff certificates/documents. Are records complete and reflect training log?

Page 7 HR Record Review

Removed: NE Plan Appropriate? column

Added more descriptive WIC categories rather than older term of PBNIC

Page 8 Moved Certification Timeframes, which the Reviewer will check next appts from the Admin Tool to this Tool.

Added: Are ISD (Integrated Service Delivery) Referrals contacted or attempted within 2 business days? (review clinic/scheduler/Incoming Referral Work Queue for New Referrals), and

5.2a Are clients on the ISD Referral Work Queue scheduled within the required timeframes for category?

Page 9 Breast pumps

Removed the pump model names from both multiuser and single user pump list. (This allows more flexibility as each agency has different pumps they use/prefer)

Administration

Page 1 on Facility section—changed MPR from 2.1f to 6.2f Nutrition Services Standards requirements

-Left question of handicap accessibility as 2.1f

2.3b Added): anthro and lab procedures for privacy

6.5a Changed from: Does the facility provide an area conducive to breastfeeding that includes comfortable chairs with arms, and a breastfeeding area away from the entrance?

(MI-WIC Policy 4.03)

To: Does the facility provide a private space for breastfeeding and/or expressing milk that includes a comfortable chair with arms, electrical outlet, and a flat surface (table or counter)?

LA Policies

7.4c- Changed wording on Returned Formula to reflect that if you are donating, the policy must be “a State approved policy (using the template), including signature from LA Admin and/or legal counsel.”

Page 2

4.1a Changed wording from: Is a medical referral required for enrollment with the WIC program? (if yes, infers there is a cost for WIC)

To: The certification is performed at no cost to the applicant? - No medical referral *required* for enrollment—infers cost

Removed: Is there any cost to the applicant for the certification?

5.2a Certification Timeframes

-Moved Appt availability to Record Review

-Added to “How does the agency...”

Use 10/20 Day report (Clinic/Reports/Schedules/10/20 Day)

Scheduler contacts Coordinator for adjustments

Monitor ISD Referrals for contact within timeframes

Other: _____

Removed:

10/20 Day Report use question—it is not required

(5.2a) Are all enrollees and clients reminded of their certification appointments?

(MI-WIC Policy 3.01)

MI-WIC letters (automatic), Voice calls, Text message, Other:

5.2a Are pregnant applicants or clients, who do not keep their certification appointments, contacted to reschedule? (MI-WIC Policy 3.01)

LA contact is required if client selected “do not mail”

How? MI-WIC letter (automatic), Auto dialer/Text Message, Agency follow-up,

Other:

Added: 5.2 Are all authorized persons asked to verify notification preferences?

(Family Notifications preferences required. Must opt for at least one. Feb Release)

Page 3 Returned Formula section

Added: Reviewer: Identify local agency (LA) staff responsible for receiving and handling of formula:

Added: 7.4c: Ask or Observe the process of formula return:

Added: Verify returned formula matches the type issued in Food Package (obtain printed copy using Food Package Display screen in MI-WIC).

7.4a Changed from: Is the formula stored securely? (Is there limited staff access? i.e. key access)

To: Is the formula stored securely in a locked area, with limited WIC staff access, out of view of clients and in appropriate conditions?

Added 7.4c Is all returned formula examined to determine whether eligible for disposal or donation? Including client interview, inspected for dents/damage/tampering, checked for expiration date?

7.4c Changed from: Does the agency donate returned formula to non-profit programs in the community? Y or N

To: Does the agency donate returned formula only to non-profit (501(c)(3)) programs in the community?

Added 7.4c: Does the LA maintain a paper file with all required documents?

- IRS Verification of 501(c) (3)
- Where & how often donating
- Class II & III proof of training/knowledge, if dispensing
- Donation receipt with required info
- Any other communications

Changed from: 7.4c Is the log 8.05A completed and submitted accurately and timely?

To: (New criteria) Is the MI-WIC Formula Acceptance and Action Log (8.05A) appropriately completed and reviewed monthly?

Added: Reviewer: If *Action Taken* on log is not recorded, does quantity listed match stored formula?

Added: 7.4c Is MI-WIC Policy 8.05 & LA policy reviewed and training provided annually to all staff?

Page 5 Breastfeeding

Removed: 6.5a Does the agency evaluate educational materials (using Exhibit 5.01c) to determine whether they present breastfeeding in a positive tone, are accurate, and are free of product names or images? (MI-WIC Policy 4.03)

-Reworded 6.5a to:

Does the agency have a clinic environment that promotes and support exclusive breastfeeding by displaying breastfeeding educational and promotional materials?

- Do materials reflect diversity of clients served?
- Are materials free of formula names, images and/or bottles?
- Are the materials prominently displayed in areas visible to clients?

(MI-WIC Policy 4.03)

Changed 6.5b from: Does the agency orient and train all staff to be supportive of breastfeeding? (MI-WIC Policy 4.02)

- Clinic environment policies
- Program goals and philosophy regarding BF
- Task appropriate info about BF
- Ways to promote, protect & support BF to WIC Clients

To:

Does the agency orient and train all staff on their roles and responsibilities in the support and promotion of exclusive breastfeeding? (MI-WIC Policy 1.07, 4.01, 12.01)

- Breastfeeding policies and agency goals?
- Training requirements?
- Breast pump issuance?

6.5c Removed wording: Does the agency provide on-going breastfeeding training and staff activities at least 4 times a year? (MI-WIC Policy 1.07) How is this done? In-Service? Conferences?

Including (but not limited to):

- Initiation and maintenance of BF
- Cultural diversity: sensitizing staff to their own attitudes and beliefs about BF, ways to promote, protect & support BF
- Information on State and national activities that promote, protect & support BF

Is training documented on staff training log/screen or meeting minutes?

-Incorporated into Training Policy 1.07 (Indicator 3.1)

6.5b changed to 6.5d (more accurate) and changed question and set-up slightly

- BF classes
- Support Groups
- Peer Counselors
- Other: _____

Moved from Nut Ed Tool and asking Peer to here:

6.5d “What are the after-hours availability of the Peer Counselor?

(e.g. cell phone use, extended clinic hrs-evening, weekends, etc)”

Page 6 Staff

Created 3.1i “Is required staff training ongoing and documented according to MI-WIC Policy 1.07?”

Added: 3.1i Are staff providing nutrition services observed for competency-based nutrition services skills annually?

Page 8 Annual review

Removed: Does the monitoring process in place, result in improvements in compliance with MI-WIC? (MI-WIC Policy 1.11, 5.06)

Page 9

Added: Quality Improvement questions

Q11 What Quality Improvement (QI) activities are WIC staff involved?

- Nutrition Services Plan
- Breastfeeding Plan
- Outreach Plan
- Other data driven QI Project_____

Q12

- Staff are provided QI tools and/or methods to address identified improvements, and
- Staff are involved in QI activities or projects, and
- Staff are/have been involved in QI training/ technical assistance opportunities.

All three (3) actions are required.

(Nutrition Service Standards, MLPH Accreditation Indicator)

Certification/Observation

Page 2 4.2a Changed wording to: The lack of citizenship or length of residency **does NOT** affect eligibility? (MI-WIC Policy 2.02) *added 'Does Not' so yes would be correct answer*

(Page 4-was on) Cost to Client was moved to Admin tool rather than the Observation tool

Page 7 Weight-Woman/Child-included digital option of 0.2#

Page 8 Lab work Changed from 7 mos to 9 mos at initial cert for infants to do hgb—policy change coming soon!

Page 10 Risk Assessment Removed -"Using Manually Assigned Risk (MAR) Tool (MI-WIC Policy 2.14)" Questions being added in MI-WIC in June 2020 Release.

Page 12 USDA Mandated Info 6.3a Reworded to "Do all WIC staff encourage, educate, and support clients in their breastfeeding decisions?"

Referrals 6.5d Added "as applicable" for breastfeeding referrals.

Page 13 Breastfeeding- Removed some repetitions questions

Removed: Does the CPA provide encouragement to all *pregnant* clients to breastfeed unless contraindicated for health reasons? (MI-WIC Policy 5.03)

Removed: 6.3a Does the CPA provide encouragement to all postpartum *breastfeeding* women to continue breastfeeding? (MI-WIC Policy 5.03)

New wording:

6.5d Are the client's BF goals assessed by the CPA?

6.5d Are clients provided with BF education and support? (MI-WIC Policy 4.01)

Page 14 New Client *Information* Removed –“using the Michigan WIC Bridge Card video or equivalent”—outdated and replaced with “Provide and review brochure”

- Moved items in different order

Food Benefit Issuance-

Changed wording from: 7.1a Observe WIC staff at recertification asking and documenting if client is having problems using benefits. (MI-WIC Policy 8.06)

To

8.1a Observe WIC staff at recertification asking if client is having problems using their EBT card. (Removed documentation—there is none- and changed to EBT card. 8.1 deals with food delivery and more appropriate.)

Removed: 4.2f Is ID (including ID/VOC/WIC Bridge cards) checked before food benefits are issued if client is present? (MI-WIC Policy 2.03) *This would already have been checked during a cert/recert/eval.*

Page 15 Print Docs

-Added 8.1b to Shopping List—this is required per policy 8.06

-Removed 9.1a Breast pump Release/Receipt and added to where we observe breast pump issuance on Nutr Ed Tool

Page 16 Updated WIC Laboratory Manual with correct reference date and name

MI-WIC Reports

Page 1 Removed -**High Risk Client Care Plan Closed/Not Needed Report** (clinic/nut & health summary/High risk care plan closed report)—Being combined with High Risk Report in Feb Release

High Risk Report:

Changed: For Care plan monitoring, select records with different risks, status and with CP-Yes that have completed care plans.

To: For Care plan monitoring, select records with different risks, category, with CP Open Date recorded and CP Not Needed Date is blank.

Changed definitions in Comments from:

CP “Yes” means client has a Care Plan (not necessarily current),

CP “No” means client does not have a care plan.

Closed means the RD marked CP Complete.

Waived means RD marked CP NOT needed.

Refused means client refused RD.

Non-WIC RD means client is seeing other RD.

TO:

CP Open Date - when Care Plan is documented.

CP Not Needed Date -date box is checked and rationale in Assessment.

CP Closed Date- the RD checked box w/ rationale on Follow-up tab.

Declined- client declined RD services.

Non-WIC RD- client is seeing other RD.

Page 2

Added: Incoming Referral Work Queue (Clinic/scheduler/Incoming Referral Work Queue)

Purpose: Review ISD Referrals for timely contact/scheduling

Administration

Added: **Formula Acceptance & Action Log** (Miscellaneous/Formula Acceptance-Action Log)

-Purpose: To Review returned formula storage, log completion, & Review Notes

Comments: Verify flagged lines are routinely reviewed (check Pending Review).

Nutrition Education

Page 4 Breast pump Issuance

Added: Breast pump Release signed?

Some wording changes to reflect new breastfeeding screens

Removed: What are the after-hours availability? –Put in Admin Tool under Breastfeeding

Page 6 HR counseling observation:

Changed from:

6.2a Was the counseling tailored to client's cultural values, reading level, situation, etc.?

To

6.2a Was the counseling tailored to client's cultural values, language/literacy needs, learning readiness, etc.?

Updated sub-headings to reflect the care plan template in MI-WIC

Outreach

Page 2_Is the new green "... And Justice for All" poster (Dated 9/19) displayed

Recordkeeping And Accountability

Removed the word Bulk—confusing and language in policy is changing

Indicator Guide

2.1f- Changed to refer to only being handicapped accessible and barrier-free.

Evaluation Questions referring to the clinic being clean and safe were moved to 6.2f.

3.1 -added i. with: The WIC Program ensures staff attend and document required trainings within timeframes. (MI-WIC Policy 1.07,1.07A)

Under Documentation Required:

Removed: Resume/Curriculum Vitae (CV) and changed to: Diplomas and/or transcripts for all non-registered staff performing CPA roles.

4.3a Removed: reference to the Manually Assigned Risks (MAR) Tool

6.1 Removed reference to NE pop-up

6.2f Moved Criteria from 2.1f: The WIC Program clinic areas, waiting areas and restrooms are clean, smoke-free, and child safe. (Nutrition Services Standards, Standard 2, 7 CFR 246.19(b)(2))

6.3 Removed old Eligibility Explanation info and replaced with new WIC Program Explanation: The purpose of the WIC program is to provide nutrition education and tips for a healthy diet, supplemental foods, referrals and breastfeeding support.

6.4 Updated all MI-WIC Policy Exhibit references for 5.01—all changed.

6.5 Evaluation Questions:

Changed From: Ask how all new staff is oriented to breastfeeding services. Review orientation checklists. (b)

To: Ask how all new staff is oriented to breastfeeding services, including breast pump issuance. Review orientation checklists. (b)

Removed: 6.5c. The WIC Program sensitizes local agency staff to their own attitudes and beliefs about breastfeeding, provides continuing education on breastfeeding initiation and maintenance, and informs staff on state and national activities, which promote, protect and support breastfeeding. (MI-WIC Policy 1.07, 4.01, 4.02, 4.03)

Note: This is now included in 3.1i—Staff Training

Under Evaluation Questions:

- Ask how all staff is provided continuing breastfeeding training at least four times a year. Review training minutes/documentation. (c)

6.5c is now NA/On hold

6.5 Updated language to reflect names of BF screens

7.4a Changed from: The WIC Program shall store returned formula in a locked area with limited WIC staff access and out of view of clients. (MI-WIC Policy 8.05)

TO:

The WIC Program shall store returned formula in a cool, clean, dry, indoor location, free of infestation; always locked area with restricted access; and out of view of clients. (MI-WIC Policy 8.05)

7.4c Changed from: The WIC Program accepts, reissues, or donates returned formula according to WIC Policy. This includes documentation of acceptance, issuance, and donation of returned or excess formula to clients, food pantries or other non-profit organizations.

To: The WIC Program who elects to donate returned formula to non-profit 501(c)(3) organizations, has developed and adheres to a LA policy and procedure that is State approved and includes signature from the LA administration and/or legal counsel. (MI-WIC Policy 8.05)

Added 7.4d The WIC Program documents acceptance, disposal/donation of returned formula in the Formula Acceptance and Action Log in MI-WIC.

Documentation Required:

Changed from:

- Returned formula log/inventory (8.05A, as revised 9/10/13)
- Local agency Policy for handling returned formula.

To:

- MI-WIC Formula Acceptance and Action Log (8.05A)
- If donating returned formula, must have:
 - Local Agency Policy
 - Paper file for Donation site(s) containing:
 - 501(c)(3) IRS tax exempt status
 - Where & How often donating
 - Class II & III proof of training/knowledge, if dispensing
 - Donation receipts with required info
 - Other communications

Evaluation Questions:

Added: Is MI-WIC Policy 8.05 reviewed and training provided annually to all staff?
(c)

Added: Review MI-WIC Formula Acceptance and Action Log to verify it is completed and reviewed for accuracy. (d)

8.1 Evaluation Questions

Changed from: ... and re-issue pro-rated benefits (EBT or returned formula). (d)

To: and re-issue pro-rated benefits on EBT card. (d)

9.1

Removed training related items which are part of 3.1

(e.g., training records (not in MI-WIC))