2023 Changes to Management Evaluation Tools

The following tools have been converted to Excel: Active Record Review, Administration, Certification Observation, Nutrition & Breastfeeding Education, Outreach, Project FRESH, & Recordkeeping & Accountability.

- An "x" should be placed in columns where they are labeled as Yes, No, and/or NA.
- An "Y", "N" or "NA" should be documented where there is a single cell to document. This will tabulate the No column or "N" in the cell.
- Formulas have been inserted in the Active Record Review to calculate percentages.

Active Record Review

Worksheet Record Review- Removed last line 7.2b "Appropriate formula amt issued for current BF?" Unable to verify in MI-WIC.
Worksheet HR & Dual Participation- Report changed to Dual Enrollment to match report name

Worksheet Compliance- Certification Timeframes

Added 5.2a-Are ISD (Integrated Service Delivery) Referrals contacted or attempted within 2 business days? (Review clinic/scheduler/Incoming Referral Work Queue for New Referrals)
    -Policy 3.01 was updated 8/22 and includes the requirement to contact client within two business days for ISD Referrals

Worksheet Breast Pump Monitoring

    -Removed reference to outdated policies for pumps (4.02, 4.06, 4.07)

    -In Excel and will calculate columns and error percentage

Administration

Certification Timeframes

- Removed "Are all authorized persons asked to verify notification preferences?" This is a MI-WIC Requirement now.
- Removed 'circulate copies' for ways to inform staff of policy changes.

Fair Hearing flyer changed from 1.04B to 1.04A

Lead Screening

- Removed …"and refer if they have not been tested or does the agency perform lead testing on all child clients"
- Added "How?"
- Added Lead Care II or Microtainers sent to State Lab

Removed Caseload question: Utilize the Caseload Management Report/Migrant to monitor agency caseload and compliance with CPBC/contracted caseload. Is the agency averaging 97% of assigned caseload? (Commend if at or above 100%) _____%

Nutrition and Breastfeeding Education

-Added wording in red

-Pg 1 (6.4) 6.4a Does the NE Coordinator review lesson plans every 2 years to ensure they incorporate client-centered approaches, current science and comply with state & federal requirements?

Pg 4 Under Breast pump Issuance: Removed reference to Policy 4.07

Replaced: ~~Manual Expression~~ with Hand expression hands-on pumping?

Added: Importance of skin-to-skin contact

Changed: 'Pump assembly and cleaning? To Pump assembly, use and cleaning?

Changed: Handling and storing breastmilk? To Handling and storage of human milk?

Changed: Breast pump Release signed? To Release Agreement signed & copy given?

Removed "NE Grid" as an option for Documentation. Indicates BF Support Tab only.

Changed wording from mothers' questions to parent's questions

Changed wording from 'How are referrals made to the IBCLC?' to If there is an issue outside of your scope of practice, what is the procedure for making a referral to Level 3 or 4 staff?

Pg 5/6 Removed 6.5b Is there a process in place to address the client's breastfeeding concerns prior to a food package or breastfeeding status change? (Good idea but not in policy.)

Pg 6 9.1a Does the agency perform a quarterly physical inventory of all breast pumps and kits, and keep a record of that inventory? ~~maintain an up-to-date breast pump inventory? Physical inventory required.~~
If inventory is completed by a PC, has procedure been approved by State Breast Pump Lead?

Removed: Interim Nutrition Education available (circle all that apply): Individual   Group
Self-Directed   Take Home Ed   wichealth.org   Other:_____

        -This is asked in a previous page

Certification Observation

Under Lead Screening-removed question on what is used to assess for lead (MCIR, Med Records, MI-WIC)

Outreach

Replaced with new Nondiscrimination statement

Removed: "Newspaper, Website, & other" for annual public announcement. It can be in any format.

Removed: *13. "*Would you like to share more WIC feedback in the future? WIC staff will reach out to you when opportunities come up (like surveys, focus groups, client advisory council, etc.). Your feedback will help us continue to improve our program."

Recordkeeping & Accountability

8.1c Removed: Under what circumstances are benefits issued without an appointment? (MI-WIC Policy 5.01 Nutrition Education Overview and Elements of Client-Centered Nutrition Education) WICHealth.org module/self-directed education completed, Client refused nutrition education, Walk-in/education mall, Other:

Added: How does the agency ensure clients are not denied supplemental foods for failure to attend or participate in nutrition education activities? Options include:

Use MI-WIC Report (i.e., Clients Eligible for Benefits)
Use WICHealth.org reports for completion
Missed NE appts have attempt to contact documented
NE Refusal documented & benefits provided

ME Indicator Guide

2.1 Updated the Nondiscrimination to new one dated 5/22. Change: …basis of…sex (including gender identity and sexual orientation).

3.1j The WIC Program may have a ~~has a WIC~~ Breastfeeding Peer Counselor Manager (other than the BF Coordinator) who meets the required qualifications and carries out the duties as specified in WIC Policy. (MI-WIC Policy 1.07)
Under Documentation Required:

- IBCLC Certification documentation for staff appointed to Agency Lactation Consultant ~~Breastfeeding Expert~~ position (~~IBCLC required by 10/1/17).~~

- Training documentation (1.07~~L~~A or equivalent)

Under Evaluation Questions:

Breastfeeding Coordinator: The BF Coordinator ~~hired after February, 2014~~ must meet the following qualifications:

- Be a CPA with a minimum of ~~at least~~ one year of experience in breastfeeding counseling.
- Possess an advanced lactation management certification (e.g., IBCLC, CLS, or LCE ~~CLC or CLE~~) or obtain lactation management certification within one year.
- Demonstrated experience in program management. (d)

Lactation Consultant (IBCLC): On staff or under contract ~~(plan approved by State)~~. Must possess:

- IBCLC -International Board Certified Lactation Consultant current certification. (f)

Breastfeeding Peer Counselor Manager/~~Coordinator:~~ The BF PC Manager must meet the following qualifications:

~~(Policy implemented 10/1/18)~~

- ~~Completion of advanced lactation certification training (preferred IBCLC)~~
- Possess an advanced lactation management certification (e.g., LCE, CLS, CLC), or obtain certification within one year.

- 6.3 Removed: ~~Observe that the CPA and other WIC staff provide verbal encouragement to breastfeed to pregnant women. (a)~~

6.5 Evaluation questions:

- Ask how all new staff ~~is oriented to~~ are trained on breastfeeding promotion and support ~~services~~, including breast pump issuance. Review new staff orientation checklists. (b)
- Review/observe that clients are offered breastfeeding education and support within time frames identified in Policy 4.02:
  - During the prenatal period.

  - After the baby is born.

  - During the postpartum period.

  - Ensure that all attempted and actual contacts are documented. ~~documentation. (i.e., Breastfeeding Support and BF Info tabs) is completed as required for pregnant women, breastfeeding women, infants and children~~. (d)