

WIC Clerk/Technician Observation Tool 2020

Staff:	# Indicates step needed for I and C-EVAL												
Reviewer:	Date:												
Client Category:													
Family Number:													
Client Certification: #Review if I or C-Eval observed													
#Rapport established, 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
(Initial Cert) Client is given a copy of Client Agreement after review.	+	-	NA			+	-	NA			+	-	NA
Client is offered copy of Client Agreement after review. (All subsequent certs/recerts)	+	-	NA			+	-	NA			+	-	NA
Adjunct Eligibility data collection													
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, or 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
Voter Registration: #I-Eval, C-Eval, if address change only													
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
Race/Ethnicity													
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
Physical Presence:													
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
Notes:	2				3								
1													

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#Length (0 – 24 months): (Policy 2.15)													
Does staff wash/sanitize hands before and after measuring infant?	+	-	NA		+	-	NA		+	-	NA		
Is one person holding head while staff gently holds both knees down and pushes heels against footboard?	+	-	NA		+	-	NA		+	-	NA		
Repeated until confirmed within 2/16”?	+	-	NA		+	-	NA		+	-	NA		
Recorded immediately in inches and 1/16 “?	+	-	NA		+	-	NA		+	-	NA		
#Weight (0 – 24 months): Do Not remove child from scale unless no re-weigh feature													
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		
#Head Circumference (0-24 months):													
Measurement taken with tape above eyebrows?	+	-	NA		+	-	NA		+	-	NA		
Repeated until confirmed?	+	-	NA		+	-	NA		+	-	NA		
Recorded immediately in inches and 1/16 th inch?	+	-	NA		+	-	NA		+	-	NA		
#Height/Weight (>24 months or woman): Do not remove client from scale unless no re-weigh feature													
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 th inch?	+	-	NA		+	-	NA		+	-	NA		
Measurements recorded immediately?	+	-	NA		+	-	NA		+	-	NA		
#Measurement not taken or not taken according to Policy:													
• Cannot be taken, is “unk” v’d & reason noted?	+	-	NA		+	-	NA		+	-	NA		
• Not according to policy is “?” v’d & reason noted?	+	-	NA		+	-	NA		+	-	NA		
#Lab: (Policy 2.16)													
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/sanitizes hands before gloving?	+	-	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 large drops of blood wiped away?	+	-	NA		+	-	NA		+	-	NA		
Blood collected without “milking”?	+	-	NA		+	-	NA		+	-	NA		
Is danger of bandage/choking addressed?	+	-	NA		+	-	NA		+	-	NA		
Blood results documented into MI-WIC and Log?	+	-	NA		+	-	NA		+	-	NA		
Is retest done according to LA 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/sanitizes hands after glove removal?	+	-	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		
Comments:													
1.					2.					3.			

Thanks to Monroe County WIC!