

2022 Changes to Management Evaluation Tools

Active Record Review

Pg 1-Instructions

Removed: 'On form, enter the agency name, clinic name, reviewer name and date.'

Removed: '**Acronyms:** (On left column of *other* Tools) O=Observation, I= Interview, S= System, D= Document'

Added: "and have a current BVT (Benefits Valid Through) date."

Added: For breast pump monitoring-"and client contact requirements."

Nutrition Education Contacts- replaced: NE Plan with Planned NE Method

Pg 4- Under staffing, added Indicator letter "J" (3.1) in front of Breastfeeding Peer Manager – Experience and advanced lactation credentials required.

Administration

Pg 4- Added New 7.5 Indicator questions:

Has the LA received formula samples? Yes ____ No ____

7.5a If yes, is courtesy/sample formula stored separate from returned formula according to MI-WIC Policy 8.10?

7.5b If yes, is distribution of courtesy/sample formula documented according to MIWIC Policy 8.10 using LA Formula Receipt and Distribution Log, Exhibit 8.10A?

Pg 10-Added place for *date* of the CLIA Waiver certificate and calibration *date* for infant and adult scale.

Certification Observation

Pg 12- Added: 6.2 d "... (goals & next planned NE method)?"

Outreach

Pg 1- Corrected link to the USDA Discrimination Complaint Form

Pg 2- 2.1a- Removed the word "new" in front of green "...And Justice for All" poster.

Pg 6- Added Interview question:

13. For clients who like to share and have quality feedback, ask:

"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." This would then be shared with Whitney Jackson, Outreach Specialist.

Recordkeeping & Accountability

9.2a Removed: Verify that all EBT cards are logged into EBT Card Inventory upon receipt?

9.2a Added: Verify that all EBT cards are recorded in MIWIC as “in-stock” upon receipt?

9.2b Removed: Verify that the current WIC EBT Card Issuance Log reflects the cards issued to clients and unassigned cards and remains with the unassigned cards.

9.2b Added: Verify that the current WIC EBT Card Issuance Log reflects the cards issued to clients and those cards unassigned.

Indicator Guide

3.1 Added: J) The WIC Program has a WIC Breastfeeding Peer Counselor Manager who meets the required qualifications and carries out the duties as specified in WIC Policy. (MI-WIC Policy 1.07)

6.2d Removed ‘Infant and Child’ in front of Evaluation

6.2 Removed: Review client record for documentation of the Nutrition Education Plan. (d)
Added: Review client record for documentation that the Nutrition Education Plan was provided. (d)

6.2d Removed: The WIC Program’s Competent Professional Authority (CPA) and the client together will develop a Nutrition Education Plan (NE Plan) at each certification and Evaluation that prioritizes client health concerns for further education and support during the certification period. The Nutrition Education Plan identifies a method (including breastfeeding support) to address these concerns. The CPA documents the next planned NE method and provides a copy to the client/family at each certification and Evaluation.

6.2d Added: At each cert/recert and evaluation appointment, the CPA and client together determine the next Planned NE Method to address the client’s concerns, needs, and/or goals. The CPA documents the Planned NE Method and provides a copy of the Nutrition Education Plan to the client/family at each cert/recert and evaluation appointment.

Evaluation Questions:

6.2d Removed: Nutrition Education topics are suggested; the client may select alternate topics.

6.6c Removed: The CPA documents the nutrition high risk condition and additional important information for subsequent counseling with R.D. in the Problem List tab.

Added: The CPA documents relevant information to share with the RD for next counseling appointment in the Problem List. This can be done directly on the NE Screen which will auto-populate to the Problem List.

6.6e Removed: Appropriate follow-up is documented, preferably in the MI-WIC Care Plan follow-up tab. The RD closes the Individual Care Plan. (MI-WIC Policy 5.06)

6.6e Added: Appropriate Care Plan follow-up is documented on the MI-WIC Care Plan follow-up tab. The RD closes the Individual Care Plan when the Care Plan is no longer relevant. (MI-WIC Policy 5.06)

6.6 Evaluation Questions:

Removed: Observe that CPA's are documenting relevant information, if applicable, on the Problem List tab of the Individual Care Plan screens. (c)

Added: Observe that CPA's are documenting relevant information for high risk clients when referring to the RD or if a client has declined. Staff document this in the Textbox on the NE Screen which will auto populate to the Problem List tab. (c)

Added New 7.5 Indicator:

7.5 The WIC Program assists the WIC client with accessing WIC formula and WIC-eligible nutritional's when not immediately accessible from an authorized WIC vendor. (MI-WIC Policy 8.10, 8.10A)

This indicator may be met by:

- a. The WIC Program shall store courtesy/sample formula in a cool, clean, dry, indoor location, free of infestation; always locked area with restricted access; separate from returned formula from clients; and out of view of clients. (MI-WIC Policy 8.10)
- b. The WIC Program shall record all delivered courtesy/sample formula on the Local Agency Formula Receipt and Distribution Log, Exhibit 8.10A, with all required documentation. Once distributed, information is documented on the log and in the clients MI-WIC record.

Documentation Required:

- LA Formula Receipt and Distribution Log (8.10A)

Evaluation Questions:

- Determine where courtesy/sample formula is stored. Is it kept separate from returned formula? (a)
- Review LA Formula Receipt and Distribution Log to verify it is completed. (b)
- Does the LA Formula Receipt and Distribution Log accurately reflect inventory? (b)

9.1a Added: The Homeless Facility Agreement to the list of Local Agency Required Procedures list that is on the Administration Tool.

9.2b Under Evaluation Questions Removed: Review WIC EBT Cardholder Signature forms to ensure that the local agency completes and retains the forms as required. (b)