Illinois WIC Program Nutrition Practice Standards (NPS)
*Documenting in WIC MIS*
September 2021

Nutrition Practice Standards (NPS) assist staff in translating policy into practice. This guidance is intended to be used with the Illinois WIC Policy and Procedure manual, NPS Secondary Education, NPS Breastfeeding, NPS Effective Counseling and I-WIC User's Manual CLINIC to assist in ensuring accurate and complete documentation of WIC participant assessments, nutrition education, and care plans.

General Guidelines

1. Local Agencies must document participant notes in the WIC MIS (I-WIC) to ensure continuity of care. There are several note types used in I-WIC. Information entered into the Nutrition Ed/Counseling, Breastfeeding and General notes creates the participant's care plan. Care Plan/SOAP notes provide additional space to document key components not documented in other note sections. Details on each note type and how to document, are addressed within this NPS.

2. Example notes are provided where applicable, the format shown is not required.

    - Notes transfer between agencies with participant records; they should be concise, relevant to the WIC visit and written utilizing the approved DHS abbreviations list only.

        - See Addendum 2 for expectations of acceptable entry of addresses, names, and commonly used terms.

    - SAP format may be used for notes but is not required (see Addendum 1).

    - Marking a participant onsite or attended in I-WIC provides documentation of the visit (not education type) and the Competent Professional Authority's (CPA's) signature, this information does not need to be included in the note.

    - Documentation for any non-WIC programs must be done outside of I-WIC.

3. Best practice is to complete notes prior to serving the next participant and at a minimum should be completed the day the WIC visit was done, to ensure quality of care and accuracy. If for some reason a CPA is unable to document the care plan on the day of the visit, the note must identify "Late entry for WIC___visit" at the top of the note(s).

4. Notes may be edited or removed the same day they are added but will be locked in the system once *End of Day* runs. The Nutrition Ed/Counseling Notes may be marked "draft" and edited for up to 72 hours by the user who added the note. If "draft" is NOT checked, the note will be locked once *End of Day* runs.

5. Participant notes are captured and maintained in the Notes screen. On this screen, the notes appear in "Read-Only" version.
   General and Care Plan/SOAP notes are the only types of notes that can be added, removed, or edited on this screen.
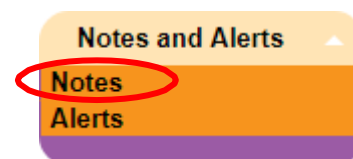
I-WIC Notes

General Notes are used to document information <u>not</u> found in Breastfeeding or Nutrition Ed/Counseling Notes, they are intended to be general in nature and may not be necessary for every participant. These notes can be manually added or system-generated on the Notes screen. Information that may be documented includes:

- System-generated information (e.g., Out of State transfers, who completed certification and birth date changes).
- Administrative activities:
  - Attempted contacts of PG applicants/participants for missed first appointment and participant's inability to comply with 10/20-day timeline.
  - Missed N/ED appointment where appointment type BI was entered and one month of benefits provided (may include the reason the appointment was missed).
  - Use of electronic medical data, physician contact.
  - Explanation of replacement of benefits.
  - Clarification of "0" income, income reassessment status.
  - Participant sanctions.
- When an Alert is used instead of a General Note:
  - An active alert pop-up message will display each time a record in the household is selected. Once an issue has been resolved, an alert should be made inactive.
  - To document non-PG contacts for missed appointments and reminder calls.
  - Alerts added under a participant's record will transfer when moved to another household or clinic in Illinois.
- Formula notes:
  - In addition to scanning the WIC Formula and Medical Nutritional Prescriptions form into the system, including HFS communications for formula.
  - When form is presented in between WIC visits document in General Note.
  - During WIC visits documentation can be completed in the Nutrition Note or Care Plan/SOAP Notes.

Medically Prescribed Formula Notes should include, if applicable:

- WIC Formula and Medical Nutritional Prescriptions form received.

- Changes in formula or prescription.

- Rationale warranting special formula: what was tried prior, why was this formula selected, what are the future plans for this participant.

- Rationale for use of Ready to Feed formula.

- Documentation of clarification, education and follow up regarding the prescription.

- Documentation of Issuance of Explanation of Benefits (EOB) letter.

Example: General Note: Medically Prescribed Formula

Breastfeeding (BF) Notes are used to document breastfeeding support information for breastfeeding mom/baby dyads. Documentation by professional staff of Breastfeeding Notes occurs on the Breastfeeding screen, under the BF Support & Notes tab.

1. By starting with mom's record, baby's record can be **linked** (*Link Baby* button) and notes will automatically appear under both participants.

2. The **Breastfeeding Notes** section may include information on the following (and does not need to be repeated in other "Notes" sections): (refer to *NPS Breastfeeding* for more details)

   - Pregnant women: feelings, knowledge and/or experiences with breastfeeding, level of intent and support to breastfed, and prenatal education provided. Follow up on breastfeeding intent, support and progress at subsequent visits or telephone calls.
   - Breastfeeding women: how breastfeeding is going (e.g., any issues, problem solving, supplementation use, pumping/storage, weaned/stopped breastfeeding) and breastfeeding dyad or supplementation education provided.
   - Peer Counselor (PC) Programs have separate guidance for documenting contacts by a PC (See Addendum 5).

3. The **Breastfeeding Referral** section is used to document and follow up on referrals. To complete the certification, you must choose the referral type *PN* for pregnant woman, *PP* for breastfeeding woman or *No Referral Made*, and indicate the reason the participant was not referred.

4. The **Contact History** section may be used to document successful or attempted contacts and topics discussed at subsequent visits.

All Breastfeeding Notes can be viewed on the Breastfeeding screen, under the BF Support & Notes tab. Additionally, these notes appear as "Read Only" on the Notes screen by selecting Breastfeeding from the note type dropdown.

Nutrition Ed/Counseling Notes are used to document nutrition education and counseling provided to the participant/parent or proxy at the initial certification as well as subsequent visits. For more details on secondary education documentation see Addendum 3.

Documentation of Nutrition Ed/Counseling Notes includes:
1. **"Method"** of nutrition education provided for the appointment:
   - Primary Individual – Select during the Certification/Recertification visit.
   - Secondary Individual – Select when the participant returns for subsequent visits, excluding group or internet-based secondary education.
   - Primary Group – Select when the first group nutrition education session is attended.
   - Secondary Group – Select for subsequent group nutrition education sessions.
   - WIChealth – Select when internet-based secondary education is completed.

2. Select the best **"Topic"** based on the category specific education topics. At least one topic must be documented. If multiple topics are discussed, CPA should:
   - Add the main topic discussed and document additional topics reviewed in the "Note" section of the main topic (one row noting all topics discussed).

3. The **"Note"** section is used to document specifics of the nutrition education/counseling provided. CPA must include (if applicable):
   - Identify who brought the child in for visit if not Head of Household (HoH).
   - Type of "Secondary Individual" education completed (e.g. "Telephone Ed" or "SSM")
   - If manually assigned "High Risk" to participant's Nutrition Risk screen, indicate reason.
   - Clarification of Nutrition Risks (e.g., inadequate vitamins/minerals (vitamin D or fluoride) (411.11); why mom would have been eligible for WIC (701)).
   - Handouts reviewed/given related to the topic.
   - Nutrition education details.
   - Modifications/tailoring of participant's food package.
   - Documentation of WIC Certification of Visit (CVE) per WIC policy NE 4.2
   - Participant centered goal(s). *
   - Follow up planned for the next WIC visit.

   *Refer to *NPS Effective Counseling* for details on setting participant centered, SMART goals.

Care Plan/SOAP Notes If an agency chooses to use this note type for documenting, only information that is relevant to WIC and <u>not</u> documented within the other note type(s) or already in I-WIC should be included. A notation must be made on the Nutrition Ed/Counseling screen to "see Care Plan/SOAP Note" and information required in the Nutrition Ed/Counseling note must be included.

The "Follow up" section is important for High Risk participants and used to trackprogress on the care plan at subsequent visits (appointment type: HR F/U or HGB) to follow up on the plan. This section of the Care Plan/SOAP note is enabled the day after the note is completed.

Documentation of Care Plan/SOAP Note occurs on the Notes screen, note type "Care Plan/SOAP".

SAP* Format

Notes entered in I-WIC may follow the SAP format when documenting, the following identifiesinformation that would be appropriate to include under each section of the SAP.

Subjective data refers to statements made by the participant. Information that may bedocumented includes statements made by the participant:
- About feeding/eating/breastfeeding practices and preference.
- Regarding nutrition related health and wellness (mental, emotional, physical) andconcerns and/or needs shared.
- Progress on the goal/plan from the last visit.

Assessment is the health professional's view of the participant's nutrition problems, taking intoconsideration the subjective and objective data (already documented throughout I-WIC).
Information that may be documented includes:
- Interpretation of growth pattern/weight gain and nutrition related risks and concerns.
- Description of the nutrition practices or feeding pattern/relationships identified.
- Explanation of any causes or contributing factors related to nutrition risk factorsassigned.
  - For example: social, situational, physical, developmental, cultural, psychological,pathological, and/or environmental factors.
  - Signs or symptoms.

Plan identifies the participant's next step(s) as determined by the participant with guidance fromthe CPA.
- Explanation of individualized food plan.
- A timeframe for completing the care plan.
- Nutrition, breastfeeding education details.
- Participant centered goal(s).
- Follow up planned for the next visit.

Referrals not related to breastfeeding will be documented on the **Referrals** screen (*see I-WIC User's Manual CLINIC* for details). If there is no applicable referral from the list provided on theReferrals screen, you may document here, or as a General Note.

Follow up as individual education and information that may be documented includes:
- Progress on goals set by the participant at the last visit.
- Any changes, concerns or needs in feeding/eating practices, preferences, breastfeedingattitudes and nutrition related health and wellness.
- Any new goals set with the participant.

*SAP format is used as objective information is already found on other screens in the WIC MIS.

Addendum 2

Commonly used terms

The below table outlines terms that are commonly used in WIC and their approved abbreviations. To maintain consistency, integrity, and understandability of documentation among local agencies and state staff, any other terms used in WIC MIS documentation should be typed out in their entirety.

A		F	
Adverse Pregnancy Outcome Reporting	APORS	Failure to Thrive	FTT
Afternoon	PM	Family Case Management	FCM
Anthropometric measurements	Anthros	Farmer's Market	FM
Appointment	Appt	Father of baby/child	FOB/FOC
As needed	PRN	Feet/foot	ft or '
B			Follow-up
Benefit Issuance	BI	Food Package Change	FPC
Benefits Valid Through	BVT	Formula feeding/fed	FF
Better Birth Outcomes	BBO	Foster parent	FP
Birth Certificate	Birth cert	Fruit/Vegetable	F/V
Birth Control	BC	**G**	
Body Mass Index	BMI	Gastro-esophageal Reflux (Disease)	GER(D)
Breastfeeding	BF	Gastrointestinal	GI
Breastfeeding/Breastfed Exclusively	BE	Gestational Age	GA
Breastfeeding/Breastfed Partially	BP	Gestational Diabetes Mellitus	GDM
Breastfeeding Status Change	BFC	Grams	gm
Breastfeeding Peer Counselor	BFPC	Gravida	G
By mouth	PO	Growth and development	G/D
C		**H**	
Calories	kcal	Handout	HO
Case manager	CM	Head of Household	HOH
Certification	Cert	Height	Ht
Certification Visit Education	CVE	Hematocrit	Hct
Certified Lactation Counselor	CLC	Hemoglobin	Hgb
Certified Lactation Specialist	CLS	High Risk Follow-up	HR F/U
Cesarean section	C/S	History	hx
Competent Professional Authority	CPA	Hour	hr
Complains of	c/o	Household	HH
Cup	c	Human Milk	HM
D		Hypertension	Htn
Date of Birth	DOB	**I**	
Department	dept	Identification	ID
Department of Human Services	DHS	Immunizations	Imms
Dept of Children & Family Services	DCFS	Inches	in or ''
Dept of Healthcare & Family Service	HFS	Individual Education	Ind Ed

Developmental Therapy	DT	Information	info
Diagnosis	Dx	Intensive Care Unit	ICU
Discontinue(d)	d/c	International Board Certified Lactation Consultant	IBCLC
E		**K**	
Education	Ed	Kilogram	Kg
Electronic Benefit Transfer	EBT	**L**	
Emergency Room	ER	La Leche League	LLL
Expected Date of Confinement	EDC	Large for Gestational Age	LGA
Expires/Expiration	exp	Last menstrual period	LMP
Liter	L	**R**	
Low Birth Weight	LBW	Ready to Feed/Ready to Use	RTF/RTU
M		Recertification	recert
Maximum	max	Registered Dietitian	RD
Medically Prescribed Formula	MPF	Registered Nurse	RN
Medications	meds	Related to	r/t
Message	msg	Release of Information	ROI
Mid-certification	midcert	Reschedule	r/s
Milligrams	mg	**S**	
Milliliter	ml	Satter Division of Responsibility	sDOR
Minutes	min	Schedule	sch
Morning	AM	Self-Study Module	SSM
Mother of baby/child	MOB/MOC	Signs/symptoms	s/s
Multivitamin	MVI	Skin-to-skin	S2S
N		Small for Gestational Age	SGA
Nasogastric	NG	Special Supplemental Nutrition Program for Women, Infants, and Children	WIC
Nausea/Vomiting	N/V	Speech-Language Pathologist	SLP
Neonatal Intensive Care Unit	NICU	Speech Therapy	ST
No known allergies	NKA	Supplemental Nutrition Assistance Program	SNAP
No show	n/s	Supplementing	supp
Not available/not applicable	N/A	**T**	
Nothing by mouth	NPO	Tablespoon	tbsp
Nutrition Education	N/Ed	Teaspoon	tsp
O		Telephone Education	Tel Ed
Obstetrics	OB	Temperature	temp
Occupational Therapy	OT	Temporary Assistance for Needy Families	TANF
Ounces	oz	Times	x
Out of State Transfer	OST	Total Parenteral Nutrition	TPN
P		Treatment	tx
Para	P	**U**	
Participant	Pt	Up to date	utd
Pediatrician	Ped	**V**	
Peer Counselor	PC	Vegetable	veg
Physical Therapy	PT	Very Low Birth Weight	VLBW

Physician	Dr/MD/PCP/HCP	Vitamin	vit
Pick up	P/U	Voicemail	VM
Pounds	lbs	**W**	
Powdered	pwd	Week	wk
Pregnant	PG	Weight	Wt
Prenatal Vitamin	PNV	With	w/
Prescription	Rx	Within normal limits	WNL
Priority Certification	PCert	Without	w/o
Q		**Y**	
Quart	qt	Year	yr
		Years old	y/o

Addresses

The address line has a 30-character limit; if addresses entered are longer than this, the demographic information will not be communicated to the EBT system and a card will not be able to be assigned. To assist with this, the table below provides USPS approved street suffix abbreviations.

Street Name	Abbreviation
Alley	Aly
Avenue	Ave
Boulevard	Blvd
Bypass	Byp
Center	Ctr
Circle	Cir
Commons	Cmns
Corner	Cor
Court	Ct
Crossing	Xing
Drive	Dr
Estate	Est

Expressway	Expy
Fields	Flds
Fort	Ft
Freeway	Fwy
Garden	Gdn
Heights	Hts
Highway	Hwy
Hills	Hls
Lane	Ln
Meadows	Mdws
Mount	Mt
Parkway	Pkwy
Place	Pl

Point	Pt
Ridge	Rdg
Road	Rd
Route	Rte
Station	Sta
Street	St
Terrace	Ter
Trailer	Trlr
Valley	Vly
Village	Vlg

Names

For consistency among Illinois WIC local agencies, enter the participant's name as it appears on the proof of identity.

Addendum 3

Documenting Secondary Education Contacts

Secondary education contacts include individual education, education provided during mid-certification and follow up visits, group education, internet education, self-study modules or interactive bulletin boards and are completed by the participant/parent or proxy.

- When scheduling secondary education indicate the preferred type of nutrition education (N/ED) using the "Appointment Note."
- Review of past and future appointments in I-WIC allows the clinic to see participants who did not attend or complete any secondary education.
- For more details on how to complete these contacts in I-WIC review the I-WIC Flow Sheets "Secondary Education Contacts" and "Mid Certification Appointments".
- A Family Shopping List must be provided upon completion of secondary education - this may be printed, sent via secure email or mailed with all personal identifiers removed.

Group Education
- On the Nutrition Education screen, CPA must document the following:
  - **Method:**
    - Primary Group – first group nutrition education session.
    - Secondary Group- subsequent group nutrition education sessions.
  - Main **Topic** covered based on class attended.
  - A **Note** is not required; however, indicate "Group session completed" for documentation of type of secondary education completed.

Internet Education
Documentation for internet education is a certificate of completion, either printed/emailed or presented at the visit. The certificate can be scanned into the participant's record, but not required.
- Frontline staff can complete the Nutrition Education screen for Pregnant and Children participants who have completed Internet Education (see NPS Effective Secondary Education, Addendum)
- On the Nutrition Education screen, document the following:
  - **Method:** WIChealth.
  - Main **Topic** covered based on certificate of completion.
  - A **Note** is not required; however, the lesson title and participant's goal may be entered from the certificate of completion for follow up at the next visit.

Self-Study Modules and Interactive Bulletin Boards
The worksheet can be scanned into the participant's record, but not required.
- On the Nutrition Education screen, CPA must document the following:
  - **Method:** Secondary Individual.
  - Main **Topic** covered based on module or bulletin board completed.
  - A **Note** is not required; however, indicate "SSM completed" for documentation of type of secondary education completed and the module/board's title and participant's goal maybe entered from the worksheet, if applicable for follow up at the next visit.

EXAMPLE: Internet Education

EXAMPLE: Self-Study Module/Interactive Bulletin Board

EXAMPLE: Nutrition Education during Individual/Mid-Certification/Follow-Up visit

EXAMPLE: Group Education

<u>**Addendum 4**</u>

I-WIC
Breastfeeding Peer Counselor Documentation and Notes

❖   The Peer Counselor must document all client contacts:
  - ➢ Clinic visit
  - ➢ Group/Class
  - ➢ Home Visit
  - ➢ Hospital Visit
  - ➢ Phone/Text

❖   Peer Counselor documentation in I-WIC should include the following information:
  - ➢ When contact is made:
    - ▪ The contact history line must be entered with the staff person's role (PC)
    - ▪ The checkbox must be marked to indicate contact was made
    - ▪ A breastfeeding note must be entered

❖   The Breastfeeding Note should include:
  - ➢ Participants concerns, questions, or comments
  - ➢ Topics discussed (if different than options in dropdown)
  - ➢ Referrals
  - ➢ Plans for follow up

Log into I-WIC and select **Clinic**.

Search for the participant you would like to work with and **select** that record.
Using **Advanced Search** will allow you to search participants by category.
For example, you could search for all active pregnant women or all breastfeeding infants.

After choosing a participant to work with, select **Breastfeeding** from the **Guided Script**.

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Select the **BF Support & Notes** tab.

In the **Contact History** section, click **Add**. The date will populate. Under **Role** select **PC.**

Under **Method,** select the choice that best describes the type of contact that was made.
It is important to check the **Contact Made** box to indicate a contact occurred.

This will be important for collecting data for future Peer Counselor Program reports.

	* Date	Role	* Method	Contact Made	* Topic/No Contact	Baby Name
	3/5/2020	PC	Phone/Text	✓		

Topic Discussed

- Breastfeeding Basics
- Breastpumps/Pumping
- Common BF Concerns
- General Support
- Return to Work/School
- Supplemental Feedings
- Weaning

Under **Topic/No Contact**, select the topic that best addresses the discussion with the participant.

If the PC discusses more than one topic, click the **Add** button to add a new row. Enter the role and method, then check the "contact made" box and enter a different topic from the dropdown under "Topic/No Contact".

Under **Call Back Date**, the PC can enter the date that the next contact will be made to follow up or check in with the participant.

Under **Achieved**, PC can enter the date that the follow up contact was made using the dropdown calendar.

Click **Save**.

BF Information		BF Questions		BF Support & Notes		BF Pumps & Aids	

Contact History

	* Date	Role	* Method	Contact Made	* Topic/No Contact	Baby Name
	3/6/2020	PC	Phone/Text	☐		

No Contact Reason
- Canceled Appointment
- Left Message/Text
- No Show For Appointment
- Participant Declined
- Phone Disconnected/Wrong Number
- Unable to Contact

Ok   Cancel

[Add] [Remove] [Link Baby]

Breastfeeding Referral

* Date Referred	* Referred To	Reason Referred	...ow-up Date

[Add] [Remove] [History]

Breastfeeding Notes

* Date	* Staff	* Note	Baby Name

[Add] [Remove] [Link Baby]

[Anthro]   [Save] [Cancel] [Next]

No Contact Made

Following the process above, if the PC was <u>unable</u> to make a meaningful contact with a participant, the **Contact Made** box would <u>not</u> be checked.

Under **Topic/No Contact**, select the reason the contact was unsuccessful.

Under **Call Back Date**, the PC can enter the date that the next attempted contact will be made.

In the **Breastfeeding Notes** section, the PC will select the **Add** button. The date will populate, and a popup field will display.

Enter a Note for this contact date: Note should indicate participant's questions or concerns, advice or recommendations given, support, barriers, or any additional information pertinent to the counseling session.

After completing the Note, click **OK**.

After the note is complete, the date, staff person, and a partial note will appear. Hovering over the 'Note' will allow the entire note to be viewed.

Baby's Name will appear if linked after Cert Action is completed by the CPA when baby is certified.

The CPA can make a referral to the PC in the **Breastfeeding Referred** section.
Click **Add**, the date populates. Select **PC** from the 'Referred To' dropdown.

Under **Reason Referred**, dropdown options appear. 'Education' and 'Support' are
appropriate options for referral to the PC. 'Breastfeeding Problems' that are minor would be
appropriate. Medical Conditions (Mother or Baby) would not be appropriate.

CPA can indicate **Referral Type**. Indicate either PN (prenatal) or PP (postpartum).
A follow-up date can be entered or left open for PC to schedule with participant.
Click **Save**.