

Certifying a Participant – CPA / L2 CPA Assistant
Effective August 2023

Refer PM CS 5.5 for *WIC Assessment Guides*

<p>Step 1 Open participant Record</p> 	<ol style="list-style-type: none"> Using the Onsite List, locate and select the desired record.
<p>Step 2 *Cert Action</p>  <p><i>Refer to IL WIC PM CS 5.2 for physical presence exceptions</i></p> <p><i>Refer to NPS Breastfeeding</i></p>	<ol style="list-style-type: none"> Select Cert Action from the guided script and Add a new certification. If <u>woman</u> cert: <ol style="list-style-type: none"> Pop-up box: Is participant currently pregnant? <ol style="list-style-type: none"> OK = Pregnant; Cancel = Not pregnant <p><u>Pregnant</u></p> <ol style="list-style-type: none"> Enter either the Last Menstrual Period (LMP) or the Expected Delivery Date (EDD). <ol style="list-style-type: none"> Update the EDD as needed; the system will update the Cert End date. Click Next to save and move to the Lab Screen. <p><u>Not Pregnant: Infant, C1-4 or Woman</u></p> <ol style="list-style-type: none"> Answer BF Status pop-up questions. Enter Actual Delivery Date (ADD) – woman only Click Next to save and move to the Lab Screen.
<p>Step 3 *Lab</p>  <p><i>Refer to IL WIC PM CS 5.1, 5.3 5.4, and 5.4 for detail</i></p>	<ol style="list-style-type: none"> Anthropometrics and, if applicable, biochemical data <ol style="list-style-type: none"> Collect on-site or via referral data <ol style="list-style-type: none"> Referral data must be received prior to the WIC appointment If referral data is provided, document anthropometric measurements (must be within past 60 days) and biochemical (pertinent to category and policy timeframes) as non-WIC and enter date measurements were taken <ol style="list-style-type: none"> Verbal data on blood lead value is acceptable. <p><u>Women</u></p> <p>Verbal data is <u>only</u> acceptable for Pre-pregnancy Weight and Weight at Delivery</p> <p><u>Infants/Children</u></p> <p>Birth weight / length – only enter per IL WIC PM guidelines, otherwise mark “unknown”.</p> <p>Weeks gestation – enter number of whole weeks completed, otherwise mark “unknown”.</p> <p>Immunization status - document on Lab Screen, under Immunization Status by indicating “Reviewed” (screened and current) or “Referred” (not current or record unavailable). If “Referred” add clarification in notes and document on Referral screen.</p> Save/Next to move to and review Growth Chart / Prenatal Chart with participant. Save and move to Breastfeeding screen, if applicable.

<p>Step 4 Breastfeeding</p>  <p><i>*Breastfeeding dyads only</i></p> <p>Refer to NPS Documenting in WIC MIS and NPS Breastfeeding</p>	<p>4 Tabs for Women; 3 Tabs for Infants/Children, if applicable:</p> <ol style="list-style-type: none"> BF Information – answer as applicable then click Next. BF Questions - answer as applicable then click Next. <ol style="list-style-type: none"> Women only “Are you experiencing any of the following?” – <u>Only</u> answer if <u>currently</u> breastfeeding (pregnant and breastfeeding or breastfeeding), otherwise check “none”. BF Support & Notes – complete and click Next. <ol style="list-style-type: none"> <u>The Link Baby</u> button (single gestation) – links the breastfeeding dyad and breastfeeding screen, including notes to the baby’s record. BF Pumps & Aids – complete as applicable then click Next to move to the Health Screen.
<p>Step 5 *Health</p> 	<p><u>Women</u></p> <ol style="list-style-type: none"> Complete both tabs – Pregnancy Information and Health Information. <ol style="list-style-type: none"> Click Next to move through the pages and tabs. After completing both tabs, click Next to move to the Nutrition Screen. <p><u>Infants / Children</u></p> <ol style="list-style-type: none"> Complete all questions. Click Next to move to the Nutrition Screen.
<p>Step 6 *Nutrition</p> 	<ol style="list-style-type: none"> Complete all 3 pages. Click Next to save and move to the Nutrition Risk Screen.
<p>Step 7 *Nutrition Risk</p>  <p><i>*When a participant is “high risk”, CPA Assistant must make referrals per Guidelines for Referrals for CPA Assistants (IL WIC PM CS Addendum) and local agency procedures.</i></p>	<ol style="list-style-type: none"> Review auto generated risks for accuracy. <ol style="list-style-type: none"> Risk is <u>incorrect</u>: <ol style="list-style-type: none"> Select the row to be deleted and click Remove. Go back to the screen where the risk was triggered and update the data so the risk will no longer generate. <u>Manually</u> assigned risks: <ol style="list-style-type: none"> Click Add and review the dropdown of manually assigned risks. Select all that apply. Click Next to save and move to the Nutrition Education Screen. <p>Reason Button will display a description of why the risk was assigned. Risk Help Button will open the IL WIC Nutrition Risk Criteria. <i>(Red heart icon indicates high risk)</i></p>
<p>Step 8 *Nutrition Education</p>  <p>Refer to Welcome to WIC and NPS Documenting in WIC MIS</p>	<ol style="list-style-type: none"> Provide nutrition education related to what the participant/parent/caregiver would like to discuss, assessment, review of current risk factors and/or previous notes. Click Add to enter a Nutrition Education topic discussed. Click in the Method box to select Primary Individual from the dropdown list. Select the Topic discussed from the dropdown. Add a Note - document WIC nutrition education provided: <ol style="list-style-type: none"> This includes additional topics discussed, handouts reviewed/requested related to the topic, certification visit education, nutrition education details, participant centered goal(s) and what follow up is planned for the next visit. Click Next to move to the Food Prescription Screen.
<p>Step 9 *Food Prescription</p>  <p>Refer to the Desktop reference: “Healthy Options for WIC” and “Understanding Family Shopping List”</p>	<ol style="list-style-type: none"> Mark Certification Complete and Save. Click Add to assign a core food package. <ol style="list-style-type: none"> Tailor core package to meet participant’s need and preferences. Remove any foods the participant is allergic to. Display participants food package to ensure foods and quantities are correct. Issue Benefits <ol style="list-style-type: none"> Issue Benefits and close when “EBT transaction completed successfully” appears. Educate and provide the Family Shopping List to explain how to get the full nutrition benefit from the foods in their package.

<p>Step 10 Referrals <i>Refer to IL WIC PM AD 12 and CS 12 for referral requirements</i></p>	<ol style="list-style-type: none"> 1. Document as required per policy: <ol style="list-style-type: none"> a. "Household referral" will apply the referral to all participants within a household. b. "Individual referral" will apply the referral only to the participant.
<p>Step 11 Review with Participant See Step 12 #3 for additional handouts</p>	<ol style="list-style-type: none"> 1. Explain WIC ID Card including participant rights / responsibilities. 2. Use of EBT card, use "Illinois WIC EBT Card" handout. 3. Review with HoH how to set up a PIN for the EBT Card, for new participants. 4. Review WIC EBT Authorized Vendor list for your clinic. 5. Ask, "What questions or concerns do you have about shopping for WIC foods or using your EBT card?"
<p>Step 12 Schedule Appt* Print Documents</p> 	<ol style="list-style-type: none"> 1. Schedule next appointment (on or before the BVT) on back of WIC ID card. <ol style="list-style-type: none"> a. CPA assistant would schedule next appointment with a CPA. 2. Provide applicable documents for participant: <ol style="list-style-type: none"> a. Family Shopping List, IL WIC Food List and IL WIC Vendor List b. Handout "How to Read your Illinois WIC EBT Receipt" c. Handout "Illinois WIC EBT Card" d. Handout "eWIC Card Brochure" e. WIC BNFT App Brochure(s) f. Any other handouts participant agreed to during nutrition education 3. Place documents in WIC ID Card.