




Secondary Education Appointment: Individual Education (In-person or Telephone)

Effective August 2023


Frontline


Step 1 Local Agency Search 	<ol style="list-style-type: none"> 1. Locate existing participant record. 2. If in-person, move to Step 2. 3. If telephone visit, call participant. <ol style="list-style-type: none"> a. Explain to participant what to expect and length visit and move to Step 2. b. If unable to reach, document and attempt another call later.
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Step 2 Mark Attended or On-Site 	Attended Scheduled Appt.: <ol style="list-style-type: none"> 1. Go to the Daily Schedule and locate your N/ED or Class appointment. 2. Click on the appointment slot, then click the Attended button. 3. When the pop-up box appears, check the Attend column for your participant. 4. Click on the Close button to close the popup. 	On-Site, no scheduled appt.: <ol style="list-style-type: none"> 1. Click the Mark on Site button. A popup “How may I help you today” will display. 2. Click the “Service” column to select the appropriate appointment type, N/ED. 3. Click Close to save the screen and close the popup. 4. An appointment will auto-generate on the Daily Schedule and client is added to onsite list.
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Step 3 Household Info Screen 	Update Information: <ol style="list-style-type: none"> 1. Verify/Update address, phone, etc. as applicable. 2. Close participant record by selecting Search. 3. Review HoH name and birth date to ensure correct. 4. Participant is now ready for the CPA.
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CPA (*required I-WIC screens)


Step 1 Open participant Record Setting the Stage  <i>Refer to NPS Effective Counseling Methods</i>	<ol style="list-style-type: none"> 1. Using the Onsite List, locate and select the desired record. 2. Record will open to the Household Summary screen at the participant level. 3. Review participant record, Nutrition Education screen and case notes before beginning the telephone education. 4. Explain to participant what to expect and length of time of the call or video chat.
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Step 2 Cert Action Screen *Breastfeeding dyads only 	<p>Note: Complete ONLY for a breastfeeding woman and a breastfeeding infant if their breastfeeding status has changed.</p> <p>If changes have occurred since the last visit, click on the BF Status Change button and answer the questions as appropriate for each participant.</p>
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Step 3 Breastfeeding Screen *Breastfeeding dyads only 	<p>Note: Complete ONLY for a breastfeeding woman and a breastfeeding infant to verify and update continued breastfeeding status.</p> <ol style="list-style-type: none"> 1. Ensure that mom and baby are linked (single gestation). 2. Add any BF Support & Notes, click Next.
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<p>Step 4 *Nutrition Education </p> <p><i>Refer to NPS Effective Secondary Education for requirements on effective individual education</i></p>	<ol style="list-style-type: none"> 1. Provide nutrition education based on what the participant/parent/caregiver would like to discuss, review of current risk factors and/or previous nutrition education topic and notes. <p><u>Document:</u></p> <ol style="list-style-type: none"> 2. Click Add to enter a Nutrition Education topic discussed. 3. Click in the Method box to select type of education, Secondary Individual 4. Select the main Topic discussed from the dropdown. 5. Add a Note - document WIC nutrition education provided for telephone education: <ol style="list-style-type: none"> a. This includes additional topics discussed, handouts reviewed related to the topic, nutrition education details, participant centered goal(s) and what follow up is planned for the next visit. b. Refer to <i>NPS Documenting in WIC MIS</i> for guidance. 6. Click Next to move to the Food Prescription Screen.
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<p>Step 5 *Food Prescription </p> <p><i>Refer to the Desktop reference: "Healthy Options for WIC"</i></p>	<ol style="list-style-type: none"> 1. Review participant's current Food Package <ol style="list-style-type: none"> a. Ask: "Would you like to make any changes to your WIC benefits?" b. Modify food package if requested. c. Ask: "What questions or concerns do you have about shopping for WIC foods or using your EBT card?" <p>9-11 mo. Infants – CPA only Requires CPA due to assessment and education to determine the option of continued baby food in containers only or change to option of fresh fruit and vegetable partial substitution based upon infant's developmental readiness and preference.</p>
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<p>Step 6 *Issue Benefits *Schedule Appt </p>	<ol style="list-style-type: none"> 1. Issue Benefits <ol style="list-style-type: none"> a. Issue Benefits and close when "EBT transaction completed successfully" appears. b. Review Family Shopping List and provide printed version if in-person. 2. If telephone visit Ask: "How would you like to receive your updated Family Shopping List (FSL)?" <ol style="list-style-type: none"> a. Options: mailed, secure email, pick up or ask do you use the Bnft app/web portal to view your benefits? Note: if the app/web portal is preferred by HoH, educate that the online version is not as detailed, as the printed FSL. Ensure they have not had any difficulties shopping for WIC benefits. b. If declined, document in notes. 3. Schedule next appointment, on or before the BVT date.
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