




Mid-Certification Appointment: In Person
Effective August 2023

Refer to:
PM CS 8.1 for mid-certification appointment requirements
PM CS 5.2 for physical presence exceptions
PM CS 5.3 and 5.4 for anthropometric and biochemical requirements


Frontline

<p>Step 1 Local Agency Search</p> 	<ol style="list-style-type: none"> 1. Locate existing participant record. <p>Explain to participant what to expect and length of time of the appointment.</p>
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<p>Step 2 Mark Attended or On-Site</p> 	<p>Attended Scheduled Appt.:</p> <ol style="list-style-type: none"> 1. Go to the Daily Schedule and locate your Mid-Cert 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. 	<p>On-Site, no scheduled appt.:</p> <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, MID-CERT. Click Close to save the screen and close the popup. <p>An appointment will auto-generate on the Daily Schedule and client is added to onsite list.</p>
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<p>Step 3 Household Info Screen</p> 	<ol style="list-style-type: none"> 1. Verify/Update address, phone, etc. as applicable. 2. Close participant record by clicking the Search icon. 3. Review HoH name and birth date to ensure correct. 4. Participant is now ready for the CPA. <p>Note: if HoH discloses a change in income, complete an income reassessment.</p>
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CPA (*required I-WIC screens)


<p>Step 1 Open Participant Record</p> 	<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.
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<p>Step 2 Setting the stage</p> <p><i>Refer to NPS Effective Counseling Methods</i></p>	<ol style="list-style-type: none"> 1. Review participant record: Nutrition Education and Nutrition Risk Factor screens and case notes. 2. Explain to participant what to expect and length of time of the appointment.
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<p>Step 3 Cert Action Screen <i>*Breastfeeding dyads only</i></p> 	<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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<p>Step 4 *Lab Screen </p> <p><i>Refer to IL WIC PM CS 5.1, 5.3, 5.4, and 5.5 for detail</i></p>	<ol style="list-style-type: none"> 1. Anthropometrics and if applicable, biochemical data <ol style="list-style-type: none"> a. Collect on-site or via referral data <ol style="list-style-type: none"> i. Referral data must be received prior to WIC appointment ii. 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"> 1. Verbal data on blood lead value is acceptable.
<p>Step 5 Breastfeeding Screen *Breastfeeding dyads only </p>	<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. Review and update breastfeeding screens as appropriate. <ol style="list-style-type: none"> a. Ensure that mom and baby are linked (single gestation). b. Check *Verified to indicate that the BF Information was reviewed. c. Complete/update BF Questions as appropriate. d. Add any new BF Support & Notes, click Next.
<p>Step 6 *Mid Certification Screen</p>	<ol style="list-style-type: none"> 1. Enter data for the required questions (bold/*) and as many of the optional questions as possible. 2. If any changes to health status, update Health and Nutrition screens as appropriate. 3. Click the Save or Next button to save the data.
<p>Step 7 Nutrition Risk Review / update as needed </p>	<ol style="list-style-type: none"> 1. Review if any information was updated on the Health and Nutrition screens. 2. New risks will be assigned when the screen is opened. <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><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/proxy would like to discuss, mid-certification assessment, review of current risk factors and/or previous 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 Topic discussed from the dropdown. 5. Add a Note - document WIC nutrition education provided. <ol style="list-style-type: none"> a. This includes additional topics discussed, handouts reviewed/requested 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.

<p>Step 9 *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?” 2. Review Family Shopping List (FSL) and provided printed copy. <ol style="list-style-type: none"> a. If remote, ask “How would you like to receive your updated shopping list?” <ol style="list-style-type: none"> i. Options: mailed, secured 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. <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 10 *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. 2. Schedule next appointment.
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