









Secondary Education Appointment: WIChealth.org

Effective August 2023

Frontline

<p>Step 1 Local Agency Search</p>  <p><i>Review the Household Summary screen to identify the family's appointments</i></p>	<ol style="list-style-type: none"> 1) Locate existing participant record. 2) Review the Nutrition Education screen and ensure the Certificate of Completion from WICHealth.org has been received. 3) Call participant <ol style="list-style-type: none"> a. Explain to participant what to expect and length of time of the call. b. If unable to reach the participant/HoH attempt another call later. If unable to reach, leave a message (if able) to contact clinic regarding reschedule appointment. <p>Note: If the lesson was completed the day of the appointment, it will not appear in the MIS' Nutrition Education Screen until the next day. Staff will need to log into the agency's WICHealth.org/support account and enter the Household ID to verify education was completed. Enter a BI appointment and proceed with required screens.</p>	
<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 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. 	<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, 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.
<p>Step 3 Household Info Screen</p> 	<p>Update Information:</p> <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. 	
<p>Step 4</p> <p><i>Refer to NPS Effective Secondary Education for more details</i></p>	<ol style="list-style-type: none"> 1. If the participant is an Infant, BF or NP they are now ready for the CPA. 2. If the participant is a PG or C1-C4: 3. 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. Ask: "Do you have any questions for the WIC Nutritionist today?" 4. If the answer was yes to a or b, the participant is now ready for the CPA. 5. If the answer was no to a & b, Frontline may continue to CPA flow Step 5. 	

CPA (*required I-WIC screens)

<p>Step 1 Open participant Record</p>	<ol style="list-style-type: none"> Using the Onsite List, locate and select the desired record. Record will open to the Household Summary screen at the participant level.
<p>Step 2 Cert Action Screen *Breastfeeding dyads only</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>
<p>Step 3 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"> Ensure that mom and baby are linked (single gestation). Add any BF Support & Notes, click Next.
<p>Step 4 *Food Prescription</p>  <p><i>Refer to the Desktop reference: "Healthy Options for WIC"</i></p>	<ol style="list-style-type: none"> Review participant's current Food Package <ol style="list-style-type: none"> Ask: "Would you like to make any changes to your WIC benefits?" Modify food package if requested. Ask: "What questions or concerns do you have about shopping for WIC foods or using your EBT card?" Ask: "How would you like to receive your updated Family Shopping List (FSL)?" <ol style="list-style-type: none"> 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. 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>
<p>Step 5 *Nutrition Education</p> 	<ol style="list-style-type: none"> If the N/Ed screen shows the lesson complete, move on to #6 If the WIChealth lesson was completed the same day as the appointment, the Certificate of Completion will not show until the next day. Complete verification process in Frontline Step 1.
<p>Step 6 *Issue Benefits *Schedule Appt</p> 	<ol style="list-style-type: none"> Issue Benefits <ol style="list-style-type: none"> Issue Benefits and close when "EBT transaction completed successfully" appears. Review Family Shopping List Schedule next appointment.