

**Illinois WIC Program Policy Practice Standards (PPS)
Guidelines for Referrals for CPA Assistants
November 2023**

Policy Practice Standards (PPS) assist staff in translating policy into practice. This guidance is intended to be used with the Illinois WIC Policy Manual; Administration Section 12 to ensure agencies with approved WIC Paraprofessional Programs (WPP) follow guidance on making appropriate referrals.

A CPA Assistant can provide basic, low risk nutrition education.

Some examples of basic, low risk nutrition and breastfeeding topics include:

- USDA’s Dietary Guidelines for Americans and MyPlate education,
- Healthy eating during pregnancy,
- Breastfeeding promotion,
- Basic breastfeeding counseling and support skills,
- Infant feeding – how to mix formula, when to introduce new foods
- Healthy eating for children,
- How to have a healthy feeding relationship with children,
- WIC Program Explanation (e.g., food benefits, WIC ID card, EBT card)

Make referrals to other WIC team members.

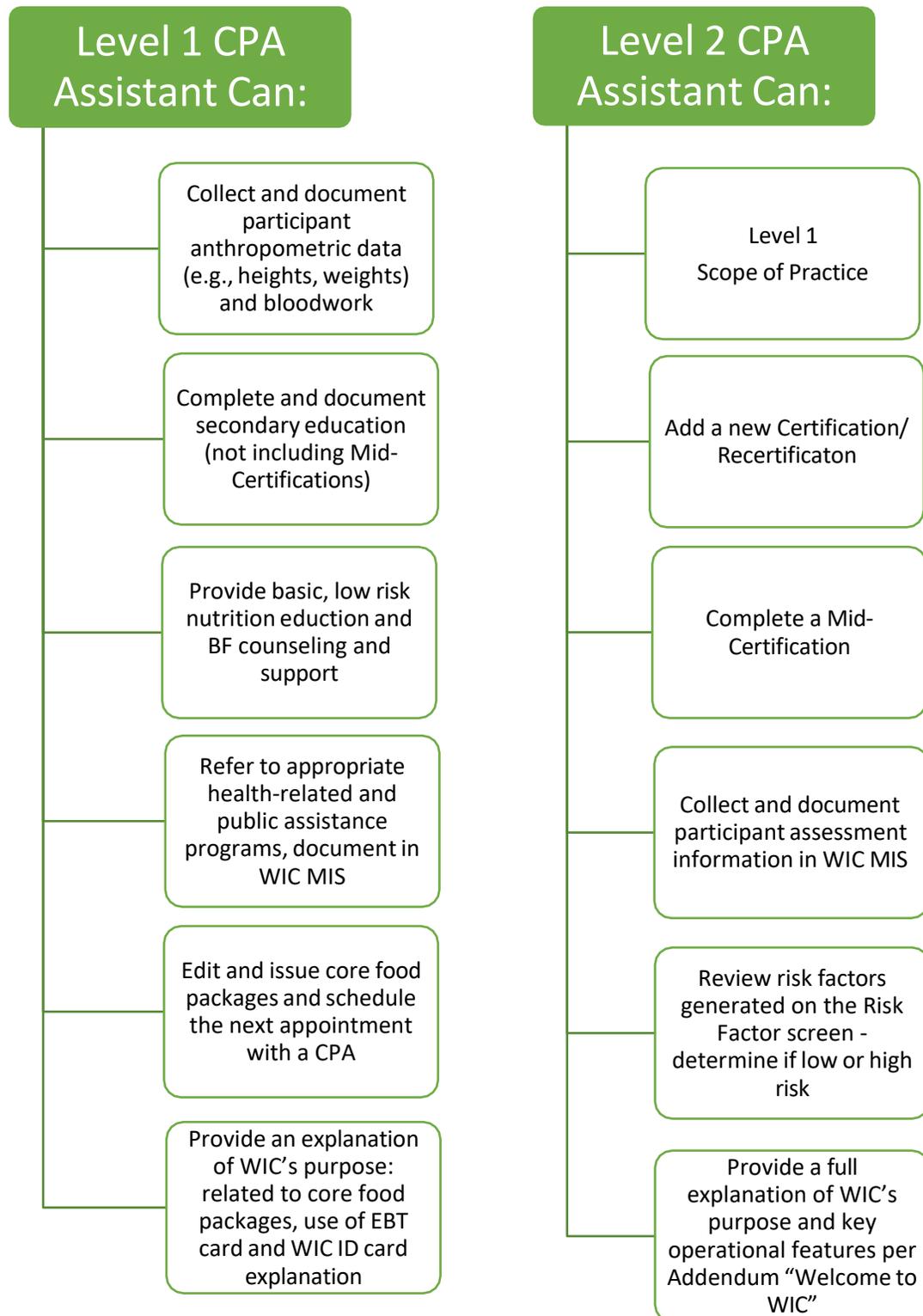
During a WIC visit CPA Assistants will encounter participants with problems that are beyond the scope of their training. Participants with complex nutrition risks must be referred to the Nutrition Coordinator or designated CPA. Participants with more complicated breastfeeding concerns must be referred to your agency’s designated breastfeeding expert (DBE). Referrals to health care providers must always come through the Nutrition Coordinator, CPA or DBE. The following are resources to assist with when to refer to other WIC team members:

1. Addendum 1 *CPA Assistant’s Scope of Practice*: chart summarizing what is in the scope of practice for a CPA Assistant and when a referral must be made to a WIC team member or community resource.
2. Addendum 2 *IWIC Nutrition High Risk Criteria*: what risk factors are considered “high risk” and must be referred to a WIC team member.
3. Addendum 3 *Documenting Referrals in IWIC*: how to document referrals in IWIC to ensure adequate follow up during the next WIC visit.
4. IL WIC PM BFPC Addendum: *Guidelines for Referrals for Breastfeeding Peer Counselors*: when to make referrals for pregnancy issues and breastfeeding problems, mother and baby illness or other breastfeeding related medical situations.

Make referrals to community resources.

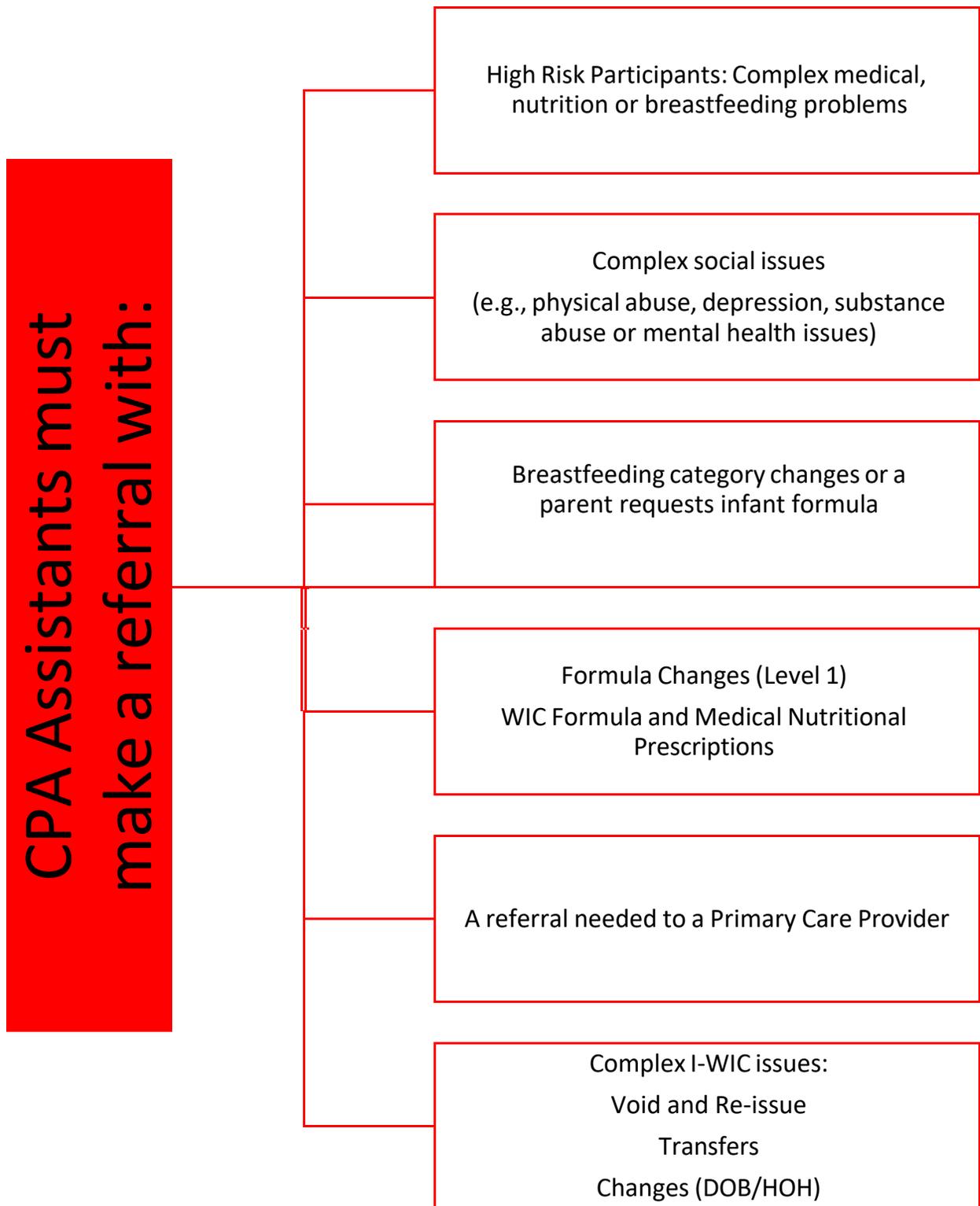
When participants are screened for WIC, they must be referred to other public assistance programs. CPA Assistant referrals to community resources may include Medicaid, SNAP, TANF, or other food assistance programs (e.g., food banks, food pantries).

CPA Assistant's Scope of Practice, by Level*



*Level depends on successful completion of training (resource: CPA Assistant Training Checklist).

CPA Assistant's Scope of Practice



Addendum 2: IWIC Nutrition High Risk Criteria

Use the following chart to identify which risk factors are consider “High Risk (HR)” and when to make a referral to the Nutrition Coordinator or designated CPA or DBE per policy and local agency’s approved procedure. Local agency may consider other risk factors high risk, manually “check” High Risk in WIC MIS and document rationale in notes.

USDA Risk #	Risk Criteria	Participant Category				
		Pregnant	Breastfeeding	Non-Breastfeeding	Infant	Child
103	Underweight or at risk of underweight				X	X
113	Obese					X
115	High weight for length (infants & children <24 months)				X	X
134	Failure to thrive				X	X
135	Slowed / faltering growth pattern				X	
141	Low birth weight & very low birth weight				X	X
201	Low hematocrit / hemoglobin	X	X	X	X	X
211	Elevated blood lead	X	X	X	X	X
302	Gestational diabetes	X				
304	History of preeclampsia	X	X	X		
341	Nutrient deficiency or disease	X	X	X	X	X
343	Diabetes mellitus	X	X	X	X	X
345	Hypertension / prehypertension	X	X	X	X	X
346	Renal disease	X	X	X	X	X
347	Cancer	X	X	X	X	X
348	Central nervous system disorders	X	X	X	X	X

USDA Risk #	Risk Criteria	Participant Category				
		Pregnant	Breastfeeding	Non-Breastfeeding	Infant	Child
349	Genetic and congenital disorders	X	X	X	X	X
351	Inborn errors of metabolism	X	X	X	X	X
358	Eating disorders	X	X	X		
360	Other medical conditions	X	X	X	X	X
382	Fetal alcohol spectrum disorders				X	X
383	Neonatal abstinence syndrome (NAS)				X	
425.09 427.03	Routine ingestion of non-food items	X	X	X		X
602	Breastfeeding complications or potential complications (women)	X	X			
603	Breastfeeding complications or potential complications (infant)				X	

For more information on WIC Nutrition Risk, review the full manual at [USDA WIC Nutrition Risks: https://bit.ly/3Z96rUg](https://bit.ly/3Z96rUg) . This manual provides the definition/cut-off value, participant category and priority level, justification, implications for WIC nutrition services, and additional references for each WIC Nutrition Risk.

Tips for High Risk Follow Up

The Nutrition Coordinator must review the I-WIC Transactions Monitoring report monthly to monitor CPA Assistant's contacts to ensure compliance with roles and responsibilities (IL WIC PM AD 12.2). The following are examples of how your agency may ensure that high risk follow up is completed. For more ideas reach out to other approved WIC Paraprofessional Programs.

- If during a WIC visit CPA Assistants encounter a participant with complex nutrition or breastfeeding problems/risks invite the Nutrition Coordinator or designated CPA to join the visit. This can be done in person, via telephone or video link as to not delay the visit. Document the details of the assistance in the WIC note to clarify that the CPA Assistant did not work outside their scope of practice.
- If the Nutrition Coordinator or designated CPA is not able to join the visit CPA Assistants should complete the visit with basic, low risk nutrition and breastfeeding education, issue three months benefits and make/document a referral and/or appointment for high risk follow up (e.g., within a month). See Addendum 3 for details.
- CPA Assistant may keep a log to document participants needing high risk follow up to be reviewed by the Nutrition Coordinator daily or weekly.
- Have daily or weekly check-ins with the WPP team to address any participant needs.
- In WIC MIS, add an Alert to the participant record if follow up is needed or the next appointment needs to be by the Nutrition Coordinator or CPA. Remember to make the Alert inactive once the need is resolved or the appointment is complete.
- Use the Care Plan/SOAP Notes option in WIC MIS. The "Follow up" section can be used to track progress on the care plan at subsequent visits to follow up on the plan. This section of the Care Plan/SOAP note is enabled the day after the note is completed.
- Schedule low risk secondary education and mid-certification appointments with CPA Assistants.
- Add a separate column to your clinic schedule "HR Follow Up" and add participants appointments here that need to be seen by the Nutrition Coordinator or CPA. Or if schedules are by staff, directly schedule next appointment with appropriate staff.
- Add a separate column to your clinic schedule for each CPA Assistant. This will make scheduling and quality assurance easier (*you can then run the SCH 7.6, 7.7, 7.10, 7.11 - Clinic Appointment List Report (Clinic Module) for a selected period, by Column Name, and Appt Type (N/ED, CERT or MIDCRT).*)

Addendum 3: Documenting Referrals in I-WIC

The Referrals screen in I-WIC allows staff to document community resources offered to participants and follow up on referrals at the next visit. CPA Assistants will also use this screen to document if a referral was made to the Nutrition Coordinator or CPA, based on the nutritional risks assigned and additional needs of a participant.

For agency specific community resources, the Program Coordinator will need to add agency specific Community Resources in the I-WIC ADMIN module-Agency/Clinic Setup jellybean.

1. Under **Agency/Clinic Setup** jellybean, click **Resource Management**.
2. Click **New**.
3. Select the Category **“Local Agency Program”**
4. Enter the **Community Resource name (Nutrition Coordinator or CPA)**, click **Ok**.
5. Enter **Address, Zip Code, and Contact Information**, click **Save**.
6. Repeat to add both Community Resources, **Nutrition Coordinator and CPA**.

Access the Referrals Screen in Clinic Module

1. Select Certification > Referrals from the File Menu Bar, or



2. Select Guided Script > Referrals from the Side Menu Panel



Referrals are grouped into two types – **Household Referrals** and **Individual Referrals**. Additionally, within each of these sections, there are three columns available to describe the action taken regarding the referral being provided – Referred, Declined, and Enrolled.

Referred indicates that the participant has accepted a referral to an available program and a referral was made.

Declined indicates that the referral program was suggested, but the participant has declined to accept an official referral.

Enrolled indicates that the participant is currently receiving support from the associated program and an additional referral to this program is not necessary. All referrals marked as Enrolled should be reviewed with the participant at each visit in the event that the support provided by the other program is terminated.

Documenting a Referral in Clinic Module

Steps to Refer a Participant to a Community Resource

1. Access the **Referrals** screen with the desired participant record selected.
2. Click the *Add* button. A new row will be added to the grid showing today's date in the Date column of the newly added row.
3. Select *HH* or *Individual* from the Type dropdown.
4. From the Referred To dropdown, select "Local Agency Program".
5. Select *Referred*, *Declined*, or *Enrolled*. Save screen.
6. Click on the *Community Resources* button.
7. Select the desired community resource, "Nutrition Coordinator or "CPA".
8. Click the *Close* button to save and close the pop-up.
9. Click the *Save* button.

Date	* Type	* Referred To	Referred	Declined	Enrolled
12/13/2022	Individual	Breastfeeding Peer Counseling Program	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12/13/2022	HH	Food Assistance Programs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12/13/2022	HH	Medicaid	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
08/17/2022	HH	Farmers' Market	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

****NOTE: If Household is selected as the Type of Referral in one participant record, all selected household member records will also have this referral recorded.**