



I-WIC FRONTLINE TRAINING  
OUTLINE & PRACTICE SCENARIOS  
REVISED 05/15/2024



Community Health Training Center

## I-WIC Training – FRONTLINE

# You must complete these scenarios to receive a certificate

1. Enroll a pregnant woman: Scenario 1: use your “**first and last name**” for this example
2. Recert child as a 30 day cert: Scenario 2: use your “**assigned participant**” for this example
3. Complete a child secondary education: Scenario 3: you will use an “**assigned participant**” for this example
4. Complete enrollment of over income applicant: Scenario 4: use your “**last name**” for this example

### OUTLINE

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#### Practice

Introduction to I-WIC

Searching for and Opening Records, Avoiding Duplicates

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- Opening a Record
- Avoiding Duplicates

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## Practice

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## Practice

## Break

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## Scenario 1: Enrolling a New Pregnant Applicant

Pregnant woman walks into WIC today. She states she has never been on WIC before.

### Support Staff Activities

#### Search for Applicant Statewide

**\*\* Use your first & last name for this scenario \*\***

1. Access the **Search** screen by clicking **Search** in the Scheduling Tasks jellybean or clicking on the **Binocular's Icon** in the toolbar.
2. Select **State** for **Scope** to perform a statewide search.
3. Select **Participant** for **Search By**.
4. Enter your **Last Name** and a **First Name** for the participant.
5. Click **Find**.
6. **Message displays** "No Records were found for the given search criteria."
7. Click **OK**

Field	Value
Scope	State
Search By	Participant

#### Precertification

1. Under the **Scheduling Tasks** jellybean, click **Precertification** or click on the **P** icon on the Toolbar.
2. Enter your **Last Name**, a **First Name**, and **Birth Date** for the **Head of Household** (the head of household is also an applicant in this Scenario).
3. At the **Housing, Migrant or Homeless** checkboxes, check **Housing**.
4. Enter the **Street Address, Zip Code** and click the box with **3 dots** to populate City, County, and State.
5. Select a value for **How Heard About WIC**.
6. Click the **Add** button under the **Applicant** grid to add the woman applicant to this household.
  - a. Enter your **Last Name, First Name, Birth Date** and **Category PG**. Notice the system automatically determines the Gender.

Field	Value
Woman's Birth Date	Your choice
Housing, Migrant, Homeless	Check Housing
Street Address and Zip code	Your choice
How Heard about WIC	Your Choice

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7. Click the **Add** button under **Phone** grid to add phone information of your choice.
8. Mark the **Prefer** Check Box
9. Select a **Language**.
10. Click the **Save** button to save the screen.

Area Code and Phone number	Your choice
Language	Your choice

### Mark Onsite

1. Click the **Mark Onsite** button at the bottom of the Precertification Screen to mark the applicant Onsite.
2. On the pop up, click in the **Service** column to access the dropdown and select **PCERT**.
3. Click **Close**.

Field	Value
Service	PCERT

### Household Information Tab

1. Navigate to the **Household Info** screen.
2. Enter a **Proxy Name** if desired.
3. Select an **Education Level** – your choice.
4. Select a **Proof of Residency**.
5. Select **Phone** for **Preferred Contact Method**.
6. Click **Next** to access the **Income Information** tab.

Field	Value
Education Level	Your Choice
Proof of Residency	IL Driver's License
Preferred Contact Method	Phone

### Income Information Tab

1. Adjunct Eligibility grid:
  - a. Participant states she receives a medical card but no other services. Under the "Household Not Participating -By Program" **check** the **SNAP** and **TANF** box.
  - b. Select a **Medicaid REP** value of **Yes** and check the **VER** checkbox which will display a popup.
  - c. Enter all applicable information. **Type of Verification, Verified "Yes."** Click **OK** to close the popup. The **Adjunct Eligible** checkbox is now marked.
2. Since the participant is Adjunct Eligible, you will ask her for a verbal income amount. Click the **Add** button below the Income grid.

Field	Value
SNAP/TANF – BOX	√ (check)
Medicaid REP	Yes

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3. Enter the income **Interval, Amount and Documentation**.  
Documentation for this example will be **Adjunctive eligibility**.
4. Enter the **Household Size**.
5. Click the **Rights and Responsibilities** button to capture the household signature.
6. Complete the Rights and Responsibilities pop-up and click **Save** and then **Close** the pop-up.
7. Click the **Save** button at the bottom.
8. Move to the **Toggle Box** at the top of the screen. **Toggle** from the household level to the **Participant Level**. (This must be done to activate the NEXT button and move to the next screen).
9. Click **Next** to save the screen and advance to the **Participant Info Screen**.

Interval	Monthly
Amount	1000
<b>Documentation</b>	<b>Adjunctive Eligibility</b>
Household Size	2

### Participant Info

1. For the PG woman:
  - a. Select **Hispanic or Latino**.
  - b. Select **at least one race**.
  - c. Select **Proof of Identity**.
  - d. Select a **Voter Registration** value.
  - e. **Special Needs** and **Physician's Name** and **Phone Number** are optional.
  - f. Click **Save**.

Field	Value
Hispanic/Latino	Your Choice
Race	Your choice
Woman - Proof of Identity	Government Issued ID
Voters Registration	Your choice

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## Print Documents

(You will not print for this scenario; the instructions are provided for your information).

1. Select the **Voters Registration Form**
2. Click the **Preview Button**
3. Select the **Printer Icon** at the top of the page to print the document.

**KEYPOINT:** Once the applicant completes the form, it should be filed by month of service and kept on file for 2 years. (If you are not aware of this process, check with your WIC Coordinator).

Move to **eWIC Card Account Maintenance**.

## eWIC Card Account Maintenance

1. Access the **Benefits file menu** at the top and select **eWIC Card Account Maintenance**.
2. Select the **Head of Household** row in the **EBT Accounts** grid, then click the **Account Setup button**.
3. Enter the last 8 digits of the **EBT card number** and verify by re-entering the same number.
4. Click the **Submit** button.

Field	Value
Card Number	Enter assigned number

**KEYPOINT:** Normally at this point, the Frontline Staff are done working with the household. They will pass the household along to the CPA to continue with the certification process. If you complete additional data at your agency, such as Lab Data, refer to your WIC Coordinator for direction.



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## Scenario 2: Recert Child – 30 Day Cert

Mom walks in today to get her child back on WIC. She has proof of address and identity but not her income information.

**Since mom does not have her proof of income today, a shortened (30 day) certification will be used. A 30- day Certification may be used for applicants/participants that have one qualifying nutrition risk and can present any two of the three required proofs (proof of residency, income and/or identity).**

### Frontline Staff Activities

#### “Search for Your Assigned Participant”

**\*\*USE THE PARTICIPANT THAT WAS ASSIGNED TO YOU\*\***

1. Access the **Search** screen by clicking **Search** in the Scheduling Tasks jellybean or clicking on the **Binocular’s Icon** in the toolbar.
2. In the **ID Field**, enter the **ID Number** for your assigned participant.
3. Click **Find**.
4. Click the **Select button** at the bottom of the screen to select the Participant and move to the Household Summary Screen

Field	Value
Search By	Participant ID#

#### Mark Onsite

1. Click the **Mark Onsite** button at the bottom of the **Household Summary** screen to **Mark the Applicant Onsite**.
2. On the popup, click in the **Service** column to access the dropdown and select **RECERT**.
3. Click the **Close** button to save the screen.

Field	Value
Services	RECERT

#### Household Information Tab

1. Navigate to the **Household Info** screen.
2. At the Household Information screen, most of the information carries over from the prior certification. **Complete/Update asterisk\* fields as needed.**
3. Select a **Proof of Residency**.

Field	Value
Proof of Residency	Driver’s License

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- Click **Next** to access the **Income Information** tab.

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### Income Information Tab

- Under the Adjunct Eligibility Grid at the top, check the **Household Not Participating in any Programs box**.
- Click the **Add** button below the Income grid, then select monthly for the **Interval**, and enter \$2000 for the **Amount**. **Select 30-day Certification in the Documentation field**.
- Enter the **Household Size**.
- Click the **Rights and Responsibilities** button to capture the household signature.
- Click **Save** and then **Close** to close the Rights and Responsibilities pop-up.
- Click **Next** and a popup will appear “Would you like to generate a Self-Declaration Form”, click **OK**.

**KEYPOINT: At your agency, the next step would be to print and complete the form, with applicant signature, scan into system and give original to applicant.**

Field	Value
Interval	Monthly
Amount	\$2,000.00
<b>Income – Verification</b>	<b>30 Day Certification</b>
HH Size	4

### Participant Info

- Information carries over from the prior certification except for proof of ID.
- Select the **Proof of Identity**.
- Select a **Special Needs** status and enter a **Physician Name** and **Phone Number** as appropriate.
- Click **Save**.

Field	Value
Proof of ID	WIC ID CARD

**KEYPOINT: Normally at this point, the Frontline Staff are done working with the household. They will pass the household along to the CPA to continue with the certification process. The participant must return to the agency before the end of 30 days to provide the missing proof or they will be terminated from the program.**

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## Scenario 3: Secondary Education Appointment (WIC Health)

A participant has completed an online WICHealth lesson and walks into the WIC Office today to get benefits for her child.

### Search for Your Assigned Participant

*(Use the participant that was assigned to you)*

1. Access the **Search** screen by clicking **Search** in the Scheduling Tasks jellybean or clicking on the **Binocular's Icon** in the toolbar.
2. In the **ID Field**, enter the **ID Number** for your assigned participant.
3. Click **Find**.
4. Click the **Select** button at the bottom of the screen to select the Participant and move to the **Household Summary** screen.

Field	Value
Search By	ID Number

### Mark Onsite

Mark the returning walk-in Onsite for a **N/ED** appointment.

1. Click the **Mark Onsite** button at the bottom of the **Household Summary** screen to **Mark the Applicant Onsite**.
2. On the popup, click in the **Service** column to access the dropdown and select **N/ED**.
3. Click the **Close** button to save the screen.

Field	Value
Services	N/ED

### Household Information Tab

1. From the **Guided Script** jellybean Select **Household Info**.
2. **Verify/Update** address, phone, etc...as applicable.
3. Click the **Save Button**.

Field	Value

**KEYPOINT:** At this point Frontline Staff would ask the participant “Would you like to make any changes to your benefits?” and “Do you have any questions for the WIC Nutritionist today?” If she answers YES to either question your next step would be to close the record by selecting the search binoculars. The participant is now ready for the CPA to make any changes and answer any questions.

If they answer NO to the questions, you may continue to verify the N/ED Screen documentation, issue benefits, and schedule the next appointment as applicable.

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### Nutrition Education

(You will not do anything on this screen for practice; the instructions are provided for your information).

1. Select **Nutrition Education** from the Guided Script.
2. Verify that the lesson completed has populated.
3. Ask the participant what questions or concerns they may have about shopping for WIC Foods or using their EBT card. Then you can issue benefits until the next WIC appointment (per policy).
4. From the **Guided Script**, Select **Issue Benefits**

Field	Value

### Issue Benefits

1. Make sure the **Issue column** is checked.
2. Click the **Preview** button to make sure the food package items, quantities, and dates are as expected.
3. Click the **Issue Benefits** button. **EBT Transaction Completed Successfully** appears in the bottom left corner.
4. Click **Next** to move to the **Schedule Appointment Screen**.

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### Schedule Appointment

1. **In the NEW Appt** column, select the **appointment type** for the participant. (Refer to I-WIC Appointments Document).
2. The duration time defaults to the standard time based on the selected appointment type. You can adjust the appointment length by changing the **DUR** value.
3. Adjust the **Start Date** and the **End Date** to be within a few days before and on or shortly after the listed **BVT** date.
4. Adjust the **Start Time** and **End Time** if the household requests a specific time.
5. **Uncheck Days** if the household indicates certain days are not available.
6. Click the **Search** button once all parameters are set. From the search results grid, select the row of the **Desired Date, Block of Appointment Time, and Resource**.

Field	Value
New Appt	MIDCRT
DUR	Adjust as needed
Start Date	A few days before BVT
End Date	On or shortly after BVT

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7. Complete **Appointment Note/Notification Note** as appropriate.
8. Verify the **Time**. It defaults to the start time of the selected row.
9. Click the **Create Appt** button.

**KEYPOINT:** The appointment information displays in the grid when the main Schedule Appt screen is displayed. There is also an Appointment created successfully notice in the status bar.

10. Click **Next** to Print Documents.

Appointment Note	If Applicable
Notification Note	If Applicable

### Print Documents

**(You will not print for this scenario; the instructions are provided for your information).**

At your agency, you must print the **Family Shopping List** to give the household a detailed list of the authorized food items that they may purchase and includes the next appointment time and date.

1. Select the **Family Shopping List**, then click the **Preview** button to display. (You would print at your agency).

**Ensure that the participant has the current Vendor List, and Food List.**

Click **Binocular icon** to close the record.

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## Scenario 4: Over Income Applicant

The applicant is here today to apply for the WIC Program and as part of the intake process, is found over income.

### Frontline Staff Activities

#### **Search for Applicant Statewide**

*Create a new Head of Household with your last name and add a child applicant with your last name.*

1. Access the **Search** screen by clicking **Search** in the Scheduling Tasks jellybean or clicking on the **Binocular's Icon** in the toolbar.
2. Select **State** for **Scope** to perform a statewide search.
3. Select **Participant** for **Search By**.
4. Enter the **Last Name** and **First Name** of the child participant.
5. Click **Find**.
6. **Message displays** "No Records were found for the given search criteria."
7. Click **OK**.

Field	Value
Scope	State
Search By	Participant

#### **Precertification**

1. Under **Scheduler** in the Menu bar or under the **Scheduling Tasks** jellybean, click **Precertification** or click on the **P** icon on the Toolbar.
2. Enter the new **Head of Household Last Name**, **First Name**, and **Birth Date**.
3. Mark the **Housing, Migrant or Homeless** checkboxes as appropriate.
4. Enter the **Street Address**, **Zip Code** and click the box with **3 dots** to populate City, County, and State.
5. Select a value for **How Heard About WIC**.
6. Click the **Add** button under the **Applicant** grid to add the child to this household.

Field	Value
HOH Last Name, First Name	Your choice
HOH Date of Birth	Your choice
Housing	√
Street Address, Zip Code	Your choice
How Heard About WIC	Your Choice

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7. Enter the Child's **Last Name**, **First Name**, **Birth Date**. The system automatically determines the **Category**.
8. Select the **Gender**.
9. Click the **Add** button under **Phone** grid and add appropriate phone information.
10. Select a **Language**.
11. Click the **Save** button to save the screen.

Child's Name	Your choice
Date of Birth	<b>Make them at least 1 year old</b>
Gender	Your choice
Phone Info	Your choice
Language	Your choice

### Mark Onsite

**Mark the Child Onsite for a Cert appointment.**

1. Click the **Mark Onsite** button at the bottom of the **Household Summary** screen to mark the applicant onsite.
2. On the popup, click in the **Service** column to access the dropdown and select **Cert**.
3. Click **Save**.
4. Click **Close** to close the pop-up.

Field	Value
Services	Cert

### Household Information Tab

1. From the **Guided Script** jellybean Select **Household Info**.
2. Enter a **Proxy Name** as applicable.
3. Select an **Education Level**.
4. Select **Proof of Residency**.
5. Select **Phone** for **Preferred Contact Method**.
6. Click **Next** to access the **Income Information** tab.

Field	Value
Education Level	Your choice
Proof of Residency	Driver's License
Preferred Contact Method	Phone

### Income Information Tab

1. The system checked the "include in verification checkbox" because the child was marked onsite, and income is required for the appointment.
2. Check the **Household Not Participating** in any programs box.
3. Click the **Add** button below the Income grid. Select the **Interval**; type in the **Amount**; and select appropriate **Documentation**.

Field	Value
Household not participating in any programs	√
Interval	Monthly
Amount	\$3000
Documentation	Paystub

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4. Enter the **Household Size**.

5. The Annual Income field will turn red.

**KEYPOINT: This is your opportunity to review the annual income amounts and household size to verify that they were entered correctly. If there was a mistake, correct it to remove the red highlight.**

**KEYPOINT: If the household were adjunctively eligible, the maximum income limit would not be applied.**

6. Click **Save** button.

7. A pop-up will display indicating that the household is over income. Click **OK** to dismiss the pop-up.

**KEYPOINT: Notice that the NEXT button is not activated and will not work. This is because the applicant is at the HH level.**

8. Move to the **Toggle Box** to select the child at the participant level.

9. Click the **Next** button.

Household Size	2

### Participant Info

**KEYPOINT: Although the Household is over income, staff must complete the required fields on this screen for each family member applying to document as part of the WIC application process.**

1. Since this child is ineligible, **mark** the **declined checkbox** for Second Parent.

2. Ask the question, **“Is this Participant Hispanic or Latino?”**  
Select as appropriate.

3. For **Race**, select one or more.

**KEYPOINT: The system auto filled “Over Income” in the Reason for Ineligibility field on the Participant Info Screen.**

4. Select a **Proof of Identity** from the drop-down.

5. Select **Save**.

6. From the Guided Script, select **Referral**.

Field	Value
Hispanic/Latino	Your Choice
Race	Your choice
Child - Proof of Identity	Birth Certificate



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### Referrals – Child

**KEYPOINT:** The Referrals screen allows staff to give participants access to additional community resources based on their needs. The Local agency is responsible for developing the Local Referral List. Check with your WIC Coordinator regarding your agency's referral list.

1. Click **Add** to enter a referral for this participant.
2. Click in the **type** box and select individual.
3. In the referred to column **select from the drop-down list**.
4. The **Referred** column is for participants being referred to a specific program. **Declined** is for those who decline the referral and **Enrolled** is for those currently participating in a select program. For this scenario check the referred box and select **Save**.
5. To generate a referral letter to a specific community resource, **select** the **row in the grid** and click the **Community Resources Button** at the bottom of the screen. The Community Resources popup appears.
6. Select the **Resource** and **close** the popup.
7. From the Guided Script, Select **Print Documents**.

Field	Value
Type	Individual
Referred to	Food Assistance Program
Community Resources	Springfield Area Services

### Print Documents

**(You will not print for this scenario; the instructions are provided for your information).**

1. Select **Referral Notice**, then click the **Preview** button to display and print.
2. Select **Ineligibility/Term Notice**, click **Preview** button to display and print.

**KEYPOINT:** At the agency, staff will print this notice, complete the form, sign, and obtain applicant signature. After completion, the form is scanned back into the system and the original copy is given to the applicant.

3. Click on **Search** or the **Binoculars** to exit the record.