

300.11

New Employee Training Checklist

Overview

Introduction

New employees hired by local WIC agencies must learn many tasks before they can work independently. This policy provides a standard training checklist for all new employees to facilitate consistent training. The checklist identifies core tasks. However, it is not intended to use in documenting the cross-training between positions that happens over time.

Policy

The WIC Coordinator should periodically review the checklist with the on-the-job training coach and new employee until it is completed. The checklist should be completed within a reasonable period of time.

Format

The checklist includes a column titled Discussed/Observed for each task. When a task has been discussed or observed, the trainer should initial the appropriate column. Policy references are included throughout the checklist.

Note: Some topics are covered through the NETC modules, however discussion with the coach is still important.

Completing the Checklist

The table below provides general guidelines for completing the checklist.

Step	Action
1	Complete the first page.
2	Prioritize the training tasks to address first based on clinic schedules, primary task assignments, and other factors.
3	Initial each task as it is discussed and observed.
4	Write N/A (for not applicable) in the columns for any tasks that the new employee will not be assigned.
5	File the checklist and document completion in the data system.

New Employee Training Checklist

Name:

Position:

Start date:

NETC date:

OJT coach:

Overview

Tasks to be completed before completing Level 1 of the WIC New Employee Training Course. See Policy 300.10 for more information.

Step	Activity	Data Completed
1	WIC Coordinator requests data system access from state WIC office (330.10)	
2	Complete local agency orientation (300.10)	
3	Record training and continuing education on training and education record (300.10a) in the data system	
4	Observe one family unit during a certification appt.	
5	Observe and work alongside a co-worker for one clinic	

Note: Local agency staff must be provided complete training in the data system before they are granted security rights to the production system.

Communication

	Discussed	Observed
Policy and Procedure Manuals		
Protocol when calling the state WIC office (L/A policy) <ul style="list-style-type: none"> • WIC HelpDesk • (800) 532-1579 • WICHHD@idph.iowa.gov 		
Friday Facts weekly newsletter (420.05 and samples)		

Clinic Set-Up

Clinic Setting

	Discussed	Observed
Confidentiality <ul style="list-style-type: none"> • Clinic set-up (380.60) • Position of computer screens (380.60) • Conversations and phone calls • Participant information • Security access 		
Nondiscrimination policy, statement and poster (320.70)		
And Justice for All poster (320.40)		
Clinic ID signs on outside door		
No smoking sign (300.20)		
Clinic flow (L/A policy)		
Promotes and supports breastfeeding (380.60)		
Customer service expectations (L/A policy and orientation)		

Data System Overview

	Discussed	Observed
Set up computers & printer/scanner		
Set up eWIC card readers and signature pads		
Set up work area for clinic, etc. (L/A policy)		
Security access for: WIC Coordinator, CPA Admin, CPA, Non-CPA-Professional, Support Staff Admin, Support Staff, Scheduler Only, LA Reports Only, View Only, Breastfeeding Peer Counselor		
Two-factor authentication and passwords		
Log into data system training environment		
Navigating the data system and File menu		
Physical security of computers, printer/scanner, and food instruments		
Computer and printer/scanner care and maintenance		
E-signature		
WIC Helpdesk		

Clinic Set-Up, Continued**Data System Fundamentals**

	Discussed	Observed
Simple search vs. Advance search with wildcard (%)		
Navigation features (e.g., tabs, radio buttons, check boxes, drop down lists, record selector, calendar dates, new vs. edit, copy, cut, paste, etc.)		
Alerts and comments		
Required fields		
Best practices and non-required fields		
Family ID and participant ID		
Record dates		

Clinic Services

Appointments

	Discussed	Observed
Information to give those making appointments (215.20) <ul style="list-style-type: none"> • What participants need to bring with them • Appointment notices • Special arrangements needed 		
10/20 day scheduling requirement (215.20)		
Length of certification periods (when to recertify) (215.06)		
Follow-up on pregnant women who miss their WIC appointment (215.23)		
Late arrivals and walk-ins (L/A policy)		
Clinic closings policy (L/A policy)		
Scheduling return appointments (215.20)		

Scheduler

	Discussed	Observed
Select clinic		
New appointment (215.20, 215.75, 240.30) <ul style="list-style-type: none"> • Certification • Nutrition education • Nutrition class • Health update • Non-WIC appointment 		
Schedule, reschedule, cancel, move appointments		
Refresh appointments		
Recent family		
Income guidelines		
Print an appointment notice		
Copy appointments		
Marking status of appointments		

Clinic Services, Continued**Family**

	Discussed	Observed
New family members		
Participant, parent/guardian, proxy		
Processing Standards		
Mailing and physical address		
VOC (transfer family to and from other clinics) <ul style="list-style-type: none"> • Responding to requests for participant information when a participant moves to another state • Incoming out-of-state transfers • Incoming in-state transfers • Providing VOC information to participants planning to move 		
Add a foster child		
FI issuance		
Contact/Address		
Transfer family		
Retrieve participant		
Organization of names <ul style="list-style-type: none"> • Primary parent/guardian • Secondary parent/guardian • Active participant • Non-active participant • Proxies 		
New Member/Proxy hyperlink		
Enrollment information/dual enrollment		
New participant type pop-up/Participant type history		
Alias hyperlink		
Notations on screen: FM, Foster, L, HR, VOC, Prov, BP		
Referred to WIC by		
Mother's education level		
FI Issuance		
Output language		

Eligibility

	Discussed	Observed
Participant type and certification periods (215.06) <ul style="list-style-type: none"> • Serving applicants who live in another service area • Address (not legal status) 		
Income guidelines		
Adjunctive eligibility (215.42)		

Voter registration (245.90)		
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Identity (220.10)

	Discussed	Observed
Proof of identity <ul style="list-style-type: none"> Acceptable forms of identity Exceptions to policy 		
Physically seen at certification (215.15)		

Income (215.40)

	Discussed	Observed
Household or family size <ul style="list-style-type: none"> Definition of a household Pregnant women and household size Definition of homeless status (390.30) Reported changes in household members 		
Adjunctive eligibility <ul style="list-style-type: none"> What it is and why Acceptable forms of proof Follow-up requirements Reported changes in program participation 		
Proof of income <ul style="list-style-type: none"> What is counted and what is not Acceptable forms of proof Exceptions to policy Current income guidelines (215.39) Reported changes of income Income family and foster children Follow-up requirements 		
Print notice of ineligibility (215.08)		

Address (215.50)

	Discussed	Observed
Acceptable forms of proof		
Exceptions to policy		
Definition of homeless (390.30)		
Definition of migrant status (390.10)		
Definition of refugee status (390.20)		
Follow-up requirements		

Clinic Services, Continued**Other Issues**

	Discussed	Observed
Voter Registration (245.90) <ul style="list-style-type: none"> • Who to give form to • Filing forms/retention requirements 		
Participant violations overview (225.80)		
Participant transfers (VOC) (220.20)		
Physical presence requirement (215.15)		
Affidavit reasons		
Print signed Statement for Identity, Address and Income		
Scanning documents		

Health and Nutrition Assessment

Health and Nutrition

	Discussed	Observed
Pregnancy and postpartum data <ul style="list-style-type: none"> Autofill EDD or LMP Link to infant 		
Breastfeeding <ul style="list-style-type: none"> Feeding history of the infant Link to mother Issue breast pump 		
Blood <ul style="list-style-type: none"> Referral data Trend graph Deferred results Normal results Lead level measurement 		
Anthro <ul style="list-style-type: none"> Referral data Birth measurements for children less than 2 years of age Chart list (print a growth chart) Growth charts age-adjusted for prematurity Flexible weight controls Weeks gestation Inaccurate reasons 		
Nutrition Interview <ul style="list-style-type: none"> Participant centered Use of the starters/prompts Print Release of Information form 		
Risk <ul style="list-style-type: none"> Auto-assigned nutrition risks Manually assign nutrition risks Manually assigning someone as high risk 		
Referrals <ul style="list-style-type: none"> Print Referral from the WIC Program form 		
Nutrition Education <ul style="list-style-type: none"> Completed nutrition education Planned nutrition education Copy completed nutrition education topics for family members WICHealth.org 		
Care Plan <ul style="list-style-type: none"> High risk participants require complete SOAP note Print a care plan 		

Health and Nutrition Assessment, Continued

Measurements (215.71)

	Discussed	Observed
Using referral data for height and weight		
Weight measurements		
Recumbent length measurements		
Standing height measurements		
Growth charts		
Explain pediatric growth charts		
Explain a pregnancy weight gain chart		
Health and nutrition history cards		

Blood Tests (215.72)

	Discussed	Observed
Puncture resistant container for lancets (360.65)		
Gloves (360.65)		
Regular hand washing (360.65)		
Use of non-invasive pulse co-oximeter (Policy 215.72)		
Blood drawing technique for hemoglobin		
HemoCue control sample and log		
Close cuvette container after each use		
Explain results of blood test		
Blood testing schedule		
Documenting on Hemoglobin log sheet		
Using referral data		
History of lead screening for all participant categories <ul style="list-style-type: none"> Referrals for infants and children screened 		

Nutrition Assessment (215.80)

	Discussed	Observed
Infant nutrition interview		
Child's nutrition interview		
Women's nutrition interview		
Dietary nutrition risks (215.61) <ul style="list-style-type: none"> Medical nutrition risks Dietary risks Auto-assigned vs. manual High risk conditions 		
Care plans for high-risk participants (215.83, 240.50))		

Health and Nutrition Assessment, Continued

Other Issues

	Discussed	Observed
Care plans for high-risk participants (215.83)	NETC	
Water testing for bacteria and nitrates (245.80)		
Fluoride status of household water supply (240.90)		
Time studies for nutrition education reporting (315.43)		
Immunization status of infants and children (245.30)		
Substance use and abuse (245.65)		
<ul style="list-style-type: none"> • Written information to all pregnant women • List of available treatment centers and programs 		
BF PC Documentation (if applicable)		

Final Eligibility Determination/Certification

	Discussed	Observed
Certification end date		
Categorical eligibility end date		
Troubleshooting unsuccessful certification		
Violations		
Termination		
Reinstate		
Applicant Rights and Responsibilities (215.95) and use of the Signature Pad		
Print Notice of Termination (215.30)		
Print Notice of Violation		
Print Notice of Ineligibility (215.08)		
Role and signature of Competent Professional Authority (CPA) (310.08)		

Referrals

Process

	Discussed	Observed
Referral from the WIC Program form (245.20)		
Request for Information form		
Referral agencies (L/A)		
Follow-up on referrals (L/A)		
Participant/Family Referrals		
Sharing of WIC data (245.05)		

Examples

	Discussed	Observed
Health Services Application (245.16)		
<i>hawk-i</i> Application (245.10)		
Medicaid guidelines (in the <i>hawk-i</i> application) (245.10)		
Maternal Health (245.15)		
Child Health (245.15)		
Family Planning (245.25)		
Public health nursing (245.50)		
Early ACCESS		
Immunizations (245.30)		
Blood lead levels (245.70)		
EFNEP and FNP		
Head Start and Early Head Start		
Oral health (240.90)		
Tobacco cessation		
Other community resources (L/A policy)		

Participant Education

Nutrition

	Discussed	Observed
Initial contacts at certification (240.50)		
High-risk second contacts (240.55)		
Low-risk second contacts (240.55)		
Exit contacts for postpartum women (240.55)		
Scheduling second ed contacts (240.50)		
Documenting second ed contacts (240.60)		
Print materials (nutrition education, breastfeeding, outreach, and program forms) and how to order (340.15)		

Breastfeeding

	Discussed	Observed
Issuing breast pumps and other equipment (240.85)		
Breastfeeding teaching resources		

WIC Foods

Food Instruments

	Discussed	Observed
Food Package <ul style="list-style-type: none"> • Model food packages • Categories/Subcategories • Add/remove food • Tailor food packages 		
Special formula documentation		
Issuing a PAN and eWIC card		
Participant PIN selection		
Deactivating eWIC cards		
Issuing benefits to the eWIC card		
Capturing a signature using the Signature Pad		
Calendar Month		
Proration of Food Benefits		
Proxy policy (225.70) <ul style="list-style-type: none"> • Form or required information • Documenting in data system 		
Reissuing benefits as a result of a food package change		
Audit Trail		
Mailing food instruments (225.85)		
Missed FI pick-up policy (L/A policy)		
Lost/stolen food instruments (225.65)		
Supply and security of WIC FIs		
Use of the Participant Customer Service IVR or web portal		

Food Packages (235.10)

	Discussed	Observed
Approved foods for each participant category		
Maximum amount of formula		
Substitutions in food items		
Coupons with WIC benefits		
Special offers: extra ounces; buy 1, get 1 free		

WIC Foods, Continued**Formulas**

	Discussed	Observed
Current contract infant formulas (235.35)		
Exceptions for non-contract infant formulas (235.55)		
Approved special formulas (235.55)		
Formula warehouse process (235.53)		
Locating a special purpose vendor		
Documentation for Medicaid regarding special formulas (235.30)		
Returned formula (235.65)		

Other Issues

	Discussed	Observed
New participant education (215.85)		
Describe how to use eWIC card (Participant brochure)		
Approved vendors in the service area (L/A list)		
Physical security of FIs (330.10)		
Ordering eWIC cards (330.20)		
Farmers' Market Nutrition Program		

Reminder: Return completed checklist to your WIC Coordinator for filing.

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