WIC Clerk/Technician Observation Tool

Place X in appropriate box. "No" column will auto add at bottom.

Staff:	#Review if Mid-cert Eval observed								
Reviewer:	**Date:**								
Client Category:									
Family Number:									
Client Certification:	**Yes**	**NA**	**No**	**Yes**	**NA**	**No**	**Yes**	**NA**	**No**
#Rapport established, introduction and summary of services?									
#Family information & proxy is updated?									
#Non-English speaker is offered translation services?									
Client agreement is read by/to client in their own language?									
Client is given a copy of Client Agreement after review. (Initial Cert)									
Client is offered copy of Client Agreement after review. (All subsequent certs/recerts)									
Ask if client is having problems using their EBT card?									
Voter Registration: #Mid-cert Eval if address change only	**Yes**	**NA**	**No**	**Yes**	**NA**	**No**	**Yes**	**NA**	**No**
Offered using MI-WIC script?									
Voter Registration verified with Photo ID (no copy needed) or if no photo ID: Affidavit completed by client, signed by staff, and attached to voter registration form.									
If declined to register, is this documented in MI-WIC & declination form retained? Keep for 24 months.									
Race/Ethnicity	**Yes**	**NA**	**No**	**Yes**	**NA**	**No**	**Yes**	**NA**	**No**
Are new clients asked using the MI-WIC screen script to identify their own race(s)/ethnicity?									
Do staff record race/ethnicity observations if client declines?									
Adjunct Eligibility data collection	**Yes**	**NA**	**No**	**Yes**	**NA**	**No**	**Yes**	**NA**	**No**
Authorized person asked about Medicaid, SNAP, FIP?									
If yes, is this verified? (one program/person)									
Family size reviewed?									
Last 30 day Income documentation is reviewed? (Verbal allowed if adjunct, migrant, homeless, cash, or no income)									
Language, Residency and Identity (ID-NEW ONLY) verified for Authorized person and clients?									
“No proof” attestation form used appropriately?									
Short cert process used appropriately? (Must have 2 of 3 proofs)									
Short certified if no proof of pregnancy?									
USER ID in status bar matches staff person?									
Physical Presence:	**Yes**	**NA**	**No**	**Yes**	**NA**	**No**	**Yes**	**NA**	**No**
Is the applicant present or not present for allowable reason (medical, barriers, infants under 8 weeks) and documented?									
#Length (0 – 24 months): (Policy 2.15)									
Does staff wash/sanitize hands before and after measuring infant?									
Is one person holding head while staff gently holds both knees down and pushes heels against footboard?									
Repeated until confirmed within 2/16”?									
Recorded immediately after each measurement in inches and 1/16 “?									

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Place X in appropriate box. "No" column will auto add at bottom.

#Weight (0 – 24 months): Do Not remove child from scale unless no re-weigh feature									
Scale zero balanced prior to weighing w/diaper and sheet?									
Child weighed with dry diaper, sheet and T-shirt only?									
Repeated until confirmed within 1 oz (zero balanced if digital)?									
Recorded immediately after each measurement?									
#Head Circumference (0-24 months):	**Yes**	**NA**	**No**	**Yes**	**NA**	**No**	**Yes**	**NA**	**No**
Measurement taken with tape above eyebrows?									
Repeated until confirmed?									
Recorded immediately after each measurement in inches and 1/16th "?									
#Height/Weight (>24 months or woman): Do not remove client from scale unless no re-weigh feature									
Ht & Wt - No shoes, scale covered with paper?									
Ht - Heels, buttocks, and shoulders against wall, legs straight?									
Ht - Eyes straight ahead?									
Wt – scale zero balanced prior to weighing, if needed?									
Repeated until confirmed within ¼ pound and 2/16th inch?									
Measurements recorded immediately after each measurement?									
#Measurement not taken or not taken according to Policy:	**Yes**	**NA**	**No**	**Yes**	**NA**	**No**	**Yes**	**NA**	**No**
• Cannot be taken, is "unk" √'d & reason noted?									
• Not according to policy is "?" √'d & reason noted?									
#Lab: (Policy 2.16)	**Yes**	**NA**	**No**	**Yes**	**NA**	**No**	**Yes**	**NA**	**No**
Immunization status provided (I, C1-4), referral made if not up to date?									
Lead screening assessed. Referred or tested if no lead test?									
Staff prepares supplies on a fresh drape/tissue for each client?									
Staff washes/sanitizes hands before gloving?									
Client/AP asked about bleeding problems &/or (latex allergy)?									
Tech wears gloves?									
Client's skin cleaned w/ isopropyl alcohol before poke?									
Are first TWO large drops of blood wiped away?									
Blood collected without "milking"?									
Is danger of bandage/choking addressed?									
Blood results documented into MI-WIC and Log?									
Is retest done if result is <8 g/dL?									
Staff washes/sanitizes hands after glove removal?									
Referral Data used or Lab appt scheduled according to Policy?									
Are test results recorded immediately?									
Does staff thank client & tell them next step w/ CPA? (Staff directs client to the next step of the WIC process?)									
Total No's:			0			0			0

Comments:

1	
2	
3	