


# Nebraska WIC Program



## Pre-Training Activities Plan - CPA Check List




Below are the activities that new CPAs need to complete for phase 1 of their training. These training activities are to be completed at the new employee’s home local agency WIC site under the guidance of a mentor or [training coordinator](#). Use the check list below to document dates planned and completed. All required tasks need to be completed before attending one of our WIC Training Center Sessions (phase 2).




*If staff are not able to complete these pre-training activities, let us know so we can reschedule their WIC Training Center Session or provide assistance to help complete these learning activities. The CPA training curriculum is progressive and builds on the pre-training skills they begin working on before they come to the training. The minimum required activities before starting phase 2 of training are indicated with this notation. \**



New Staff Name: LA Name:	LA Training Coordinator Name:		
	Dated planned	Date Completed	Comments
<p><b>*Civil Rights Training</b></p> <ul style="list-style-type: none"> <li>- <a href="#">2024 Civil Rights Training – Part 1 on Civil Rights Policy</a> (1 hr 30min)</li> <li>-Civil Rights Training – Part 2 – <a href="#">A Call To Action: Addressing Historical and Ending Contemporary Racial Inequities</a></li> </ul>			
<p><b>*About WIC – Introductory Videos</b></p> <ul style="list-style-type: none"> <li>- <a href="#">History of WIC – part 1</a></li> <li>- <a href="#">History of WIC – part 2</a></li> <li>- <a href="#">WIC History &amp; What You Do Works</a></li> </ul> 			
<p><b>* WIC Terminology</b></p> <ul style="list-style-type: none"> <li>- Training Coordinator review basic WIC vocabulary with new staff that you clerks typically see in Journey or use on a daily basis ie.</li> <li>- Authorized representative; additional authorized representative; CPA; nutritional risk; nutrition education; proxy; WIC vendor WIC vendor manager; sanction points; Journey Train; Journey; referrals; processing standards; eWIC Card; WIC Shopper App, Breastfeeding Peer Counselors, abbreviations or acronyms in Journey etc.</li> </ul>			
<p><b>* Benefits of WIC &amp; Eligibility</b></p> <ul style="list-style-type: none"> <li>- Discuss benefits of WIC</li> <li>- Discuss general eligibility requirements (ID, Income, residency, nutritional risk)</li> <li>- Review Procedures: <a href="#">Categorical Eligibility</a></li> </ul>			

	Dates planned	Date Completed	Comments
<p><b>*Food Benefits</b> - Discuss with your Local Agency Vendor Manager</p> <ul style="list-style-type: none"> <li>- 6.10.22 <a href="#">All staff Webinar recording</a> on new foods starting July 2022 Passcode: yeVK4?9+</li> <li>- Review <a href="#">Nebraska WIC Approved Foods List</a></li> <li>- Locate &amp; review the Approved Food List on the WIC Shopper App</li> <li>- Visit with Staff to identify specific store brands in your area and where listed on the food brochure</li> <li>- Locate &amp; review the list of WIC Approved Stores in your area</li> <li>- Using the food brochure for help, complete the <a href="#">WIC Approved Foods activity worksheet</a>; Bring any questions to training clinic</li> <li>- Discuss with your training coordinator: <a href="#">Basic WIC Food Packages</a> and <a href="#">Contract Formula</a> that WIC Provides</li> </ul>			
<p><b>*Nutrition Ed / BF Benefits</b> – Discuss with LA training coordinator</p> <ul style="list-style-type: none"> <li>- Discuss what nutrition &amp; breastfeeding educational materials are available at your clinic; where they are located; which materials are used most often and for what type of clients</li> <li>- Visit with other CPA's in your clinic to see what their favorite educational materials are for clients; find out when they use these materials and the key things they like to point out</li> <li>- Read through all of the materials that your clinic provides so you can refer to these resources when providing client education</li> <li>- <i>Collect one hard copy of each educational resource. Make a folder to keep at your desk and bring the folder with you to training clinic so you can use some of your own resources when educating clients</i></li> <li>- Who provides nutrition education at your clinics?</li> <li>- Who are the breastfeeding experts at your clinic?</li> <li>- Do you have breastfeeding peer counselors?</li> <li>- Who is the designated breastfeeding expert in your clinic? Become familiar with BF support and if your agency has a BFPC program</li> <li>- USDA WIC Breastfeeding Support Website - <a href="#">WIC BF Support</a></li> </ul>			
<p><b>Referral Benefits</b> - Discuss with your LA training coordinator:</p> <ul style="list-style-type: none"> <li>- Referral resources available in your service area</li> <li>- Contact information for referral resources</li> <li>- Special needs populations that your agency serves</li> <li>- Programs your agency typically refers to</li> <li>- Show the listing of referral resources listed in Journey</li> </ul>			


<ul style="list-style-type: none"> <li>- Discuss what pamphlets or brochures your clinic has available for referrals to other programs; Where are they located; Which ones are most frequently used?</li> </ul>			
	Dates planned	Date Completed	Comments
<p><b>WIC Clinic Sites</b> - Discuss with your LA training coordinator:</p> <ul style="list-style-type: none"> <li>- How many WIC clinics your agency offers</li> <li>- Your WIC clinic locations, days open, hours</li> <li>- WIC clinic locations across the state and how to contact</li> <li>- Identify any other WIC clinics in the same city as my WIC clinic</li> <li>- Explore the Ne WIC website to find contact information for WIC programs across Ne; Click the "contact WIC near you" link located on the home page; enter a zip code to find WIC locations in that area</li> </ul>			
<p><b>*WIC Appointment Types</b></p> <p>Discuss with your LA training coordinator:</p> <ul style="list-style-type: none"> <li>- How your clinic schedule is set up</li> <li>- How to you read the Journey appointment schedule</li> <li>- How to read the family panel</li> <li>- How to know when to schedule the next appointment</li> <li>- How to know what type of appointment to schedule</li> <li>- <a href="#">Basic WIC Appointment Types in Journey</a></li> <li>- Review Procedure: <a href="#">Length of Certification Periods</a></li> </ul>			
<p><b>*Clinic Observations</b> </p> <p><b><u>Rights &amp; Responsibilities</u></b></p> <p>Observe clerks as they Review Rights &amp; responsibilities at certifications at the beginning of the visit</p> <ul style="list-style-type: none"> <li>- Take note of how and when clients sign the signature pad for rights &amp; responsibilities; how do staff explain what the client is signing?</li> <li>- Locate the Rights &amp; Responsibilities section on the WIC Shopper App</li> <li>- Review: <a href="#">Rights &amp; responsibilities (detailed version)</a></li> <li>- Review: <a href="#">Rights &amp; Responsibilities (summary)</a></li> </ul>			Name the staff & clinic that was observed:
<p><b>*<u>Answering Phone/Making Appts</u></b> </p> <ul style="list-style-type: none"> <li>- Observe how staff answers the phone at your clinic</li> <li>- Observe staff as they enter a few appointments into Journey</li> <li>- Observe how staff mark appointments as arrived or no show</li> <li>- Review WIC Procedure on <a href="#">Processing Standards</a> to become familiar with "time frames for eligibility determination"</li> </ul>			Name the staff & clinic that was observed:

	Dates planned	Date Completed	Comments
<p><b>*Collecting &amp; Documenting Proof</b> </p> <ul style="list-style-type: none"> <li>- Observe WIC clerks as they review and document proof of ID, proof of residency, and proof of income</li> <li>- Notice what types of proof are most commonly used</li> <li>- Review the list of proof required at certification visits so you are familiar with the list &amp; where to look</li> </ul> <p><a href="#">Proof Required at certification - summary</a></p>			Name the staff that was observed:
<p><b>*Clinic Observations</b> </p> <p><b>All Appointment categories of WIC Clients</b> (pregnant, BF, Not BF, child, infant)</p> <p>Discuss with your training coordinator the role of the CPA in different types of appointments listed below and the panels in Journey that will be completed. Observe multiple appointments. When observing live clinic appointments, sit in a location close enough where you can see what staff are typing in the computer. If your clinic does not have enough real clients to observe, your LA training coordinator or WIC Director can schedule additional observations at other times or other clinic locations. Be sure to observe some appointments from <u>beginning to end</u> to get the big picture. At a minimum please observe:</p> <ul style="list-style-type: none"> <li>- 3 Full Cert (1 preg woman, 1 mom/baby, 1 child)</li> <li>- 3 Full Recerts (1 preg woman, 1 mom/baby, 1 child)</li> <li>- 3 Food Benefit List Explanation (using flip chart &amp; brochures)</li> <li>- 3 Explanations of how to download and use WIC Shopper App</li> <li>- 3 Midcerts</li> <li>- 3 Nutrition ed</li> <li>- 3 Height/weight/hemoglobin check</li> <li>- 3 BF education</li> </ul> <p>- After the observations, take time to look closer at <u>what was documented</u> in Journey during the visit; <u>what goals</u> were set with the client? Take time to ask staff questions about what you observe.</p>			Name the staff and clinics observed:
<p><b>* Hemocue Learning Center Online Course</b> </p> <ul style="list-style-type: none"> <li>- Register for: <a href="#">HemoCue Virtual Training Course</a></li> <li>- To register you will need to enter (email, name, address, password) and select a WIC course</li> <li>- Under the Course Materials – review the HemoCue Hb301 System Operating Manual</li> <li>- Watch the video lesson titled: HemoCue Hb301 System Course (WIC)</li> <li>- Print off your certificate when finished</li> </ul>			

	Dates planned	Date Completed	Comments
<p><b>*Clinic Observation &amp; Practice</b> </p> <p>CPA staff demonstrate using correct procedure ; then new staff practice</p> <ul style="list-style-type: none"> <li>- Measure height/lengths, weights: infant child Preg</li> <li>- Perform hemoglobin stick: child Preg</li> <li>- Review procedures (<a href="#">blood work requirements</a>; <a href="#">infection control</a>; <a href="#">Hgb technique</a>; <a href="#">assessment for blood and lead screening</a>; <a href="#">measuring length/height/weight</a> etc)</li> </ul>			<p>Name the staff person observed</p> <p>Who did trainee practice taking ht/wt/ and hemoglobin on?</p>
<p><b>*Journey Navigational Videos</b> </p> <p><a href="#">eWIC introductory Video (4 min) -</a>  <a href="#">Explaining eWIC to Clients – sample 13 min</a>  <a href="#">Basic Journey Terminology – Categories (4 min</a>  <a href="#">Navigation Basics Video (4 minutes)</a>  <a href="#">Search for Families and Participants Video (7 min)</a>  <a href="#">Create a New Family &amp; Schedule and Appts (10 min)</a>  <a href="#">Food Package Introduction (9 minutes)</a>  <a href="#">Breastfeeding Mom &amp; Baby Pairs (14 min)</a></p>			
<p><b>*Computer practice / Journey Train LOGGING IN</b> </p> <p>Training Coordinator help new staff practice the following:</p> <ul style="list-style-type: none"> <li>- Logging in with their assigned user name and password into Journey Train; do not share logons</li> <li>- Logging in to your clinic</li> </ul> <p>While waiting for the Journey Train Account to get set up, the LA Training Coordinator may log into Journey Train (without sharing password) and demonstrate how to navigate in journey train and help trainee work through these items.</p>			<p>REMEMBER: THIS LOGON MUST BE REQUESTED FROM OUR HELP DESK AHEAD OF TIME</p>
<p><b>* SEARCHING</b></p> <p>Training Coordinator help new staff practice the following:</p> <ul style="list-style-type: none"> <li>- Simple search for someone by family ID in Journey Train</li> <li>- Advanced search by name</li> <li>- Advanced search by date of birth</li> <li>- Advanced search by home phone</li> <li>- Wild card search</li> <li>- Soundex search</li> </ul>			

	Dates planned	Date Completed	Comments
<p><b>* Making Family/Scheduling Apt</b></p> <ul style="list-style-type: none"> <li>- Practice <u>making up 8-10 new families</u> in Journey Train &amp; then <u>schedule</u> them for their first certification appointments. In your families include a variety such as: <ul style="list-style-type: none"> <li>o 3 year old child, 1 year old child, 1 month old infant, 7 month old infant, pregnant woman, BF woman, Pregnant woman with a 2 year old</li> <li>o get comfortable making up families and scheduling them for appointments</li> </ul> </li> <li>- Schedule appointments for these new families in journey train – write down their family ID number in the comments column on this sheet and bring to training clinic</li> <li>- Practice moving appointments</li> </ul>			Record the family #'s that the trainee made and bring the numbers with you to training clinic
<p><b>Clinic Observations</b> </p> <p><b>Scanning Documents into Journey</b></p> <p>Discuss with training coordinator</p> <ul style="list-style-type: none"> <li>- Who is responsible for scanning documents into Journey</li> <li>- <u>What documents need to be scanned</u> _____</li> <li>- How to scan documents in journey</li> <li>- Describe the CPA's role in handling and approving PAF's _____</li> </ul>			
<p><b>*Confidentiality</b></p> <ul style="list-style-type: none"> <li>- Discuss importance of client confidentiality with your WIC Director</li> </ul>			
<p><b>Website Search Scavenger Hunt</b> </p> <p>Explore the Nebraska WIC Website: <a href="https://dhhs.ne.gov/WIC">https://dhhs.ne.gov/WIC</a></p> <p><b>Home Page</b></p> <ul style="list-style-type: none"> <li>- Report WIC Fraud ; Contact WIC Near You</li> </ul> <p><b>WIC Families Section</b> – know the information on this webpage so you can refer families if needed</p> <ul style="list-style-type: none"> <li>- Shopping with eWIC brochure</li> <li>- using eWIC Card ____</li> <li>- Setting eWIC Card pin ____</li> </ul> <p><b>Health Care Provider Section</b></p> <ul style="list-style-type: none"> <li>- NE WIC Contract Formula Sheet</li> <li>- NE WIC Formulary ____</li> <li>- Physician authorization forms: Infant Children Women</li> <li>- Common food package cheat sheets (with pictures)</li> </ul>			

<p><b>Local Agency Staff Section</b></p> <ul style="list-style-type: none"> <li>- WIC Procedures &amp; policy memos</li> <li>- All Staff Training Videos; scroll down page to see the topics</li> <li>- Ongoing Training/CPA Webinars: Watch July 17, 2017 training videos on WIChealth.org</li> <li>- Ongoing Training: Baby Behavior Training Videos; watch them</li> <li>- Under New Staff Training: Locate CPA job aids and resources</li> <li>- Nutrition Education Materials (state provided)</li> </ul> <p><b>Explore the Web:</b> Take a few minutes to see what you find when you search for WIC on the website. You might search for WIC in other states, or search for WIC videos on YouTube.</p> <p><a href="#">WIC Works Resource system</a></p>			
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	Dates planned	Date completed / comments
<p><b>*Ordering Supplies</b></p> <ul style="list-style-type: none"> <li>- What <u>brochures and materials</u> does your clinic have on hand to give to new WIC clients or clients who want information about WIC?</li> <li>- What brochures and materials does your clinic commonly provide to WIC clients for nutrition education and for referrals to other programs</li> <li>- Review &amp; become familiar with the content provided in these brochures and handouts</li> <li>- <u>Make a folder</u> including 1 of each of these commonly used materials for your own reference</li> <li>- Discuss clinic process for ordering WIC forms, food brochures, educational materials</li> <li>- Office supplies</li> <li>- Who is responsible for ordering / contact information</li> </ul>		
<p><b>WIC Store Visit</b> (before or after training clinic)</p> <ul style="list-style-type: none"> <li>- Visit a WIC Store with your LA Vendor Manager</li> <li>- <a href="#">Install the WIC shopper App on your phone - directions</a></li> <li>- Learn to use the WIC Shopper App to identify WIC foods</li> <li>- Observe a WIC purchase</li> <li>- Identify which WIC approved breads your store carries</li> </ul>		
<p><b>Foster Care (After training clinic)</b></p> <ul style="list-style-type: none"> <li>- Listen to <b>foster care webinar</b> from 5.12.2020</li> <li>- Complete with 4 weeks after attending training clinic</li> </ul>		<p>Note this piece used to be taught during training clinic but has been moved to be completed at the home agency after the trainee attends training clinic.</p>

## \*Training Coordinator Name & Contact

Identify name/contact information of your Local Agency Training Coordinator responsible for helping new staff complete these activities

Please use the chart above to plan and record the new trainee's progress in completing the above items. Copies should be kept on file and available upon request. Bring a copy with you to the training center to share with your training coach. Starred items should all be completed prior to staff attending the training center. If the required items are not able to be completed prior to the scheduled session at the training center, please contact Jackie Johnson to reschedule their time or request assistance if needed. If you need assistance setting up clinic observations for your staff over zoom, please contact Jackie Johnson.

Also, here is a link to [CPA Digital Handout Resource list](#); many of these will be reference during training clinic so please review prior to your training session be familiar with these resources. Make photo copies of the ones that are most used by your new staff for quick reference.

NAME OF STAFF COMPLETING THIS FORM:

Date starred pre-training clinic items completed:

Date remaining post-training clinic items completed: