

# NEBRASKA WIC PROGRAM

## Pre-Training Activities Plan - Clerk Check List

- Below are the activities that new Clerks need to complete
- 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](#).
- Tasks noted with an asterisk, need to be completed before attending one of our WIC Training Center Sessions
- *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 Clerk training curriculum is progressive and builds on the pre-training skills they begin working on before they come to the training.
- Please allow a **minimum of 80 hours** to complete the required training activities prior to attending a training clinic session

Local Agency Name:

New Clerk Name:

Training Coordinator Name(s)

WIC Director Name:

	Date Completed	Comments/ Additional Details
<b>CIVIL RIGHTS TRAINING *</b>		
<input type="checkbox"/> <a href="#">2024 Civil Rights Training – Part 1 on Civil Rights Policy</a>		
<input type="checkbox"/> Civil Rights Training – Part 2 – <a href="#">A Call To Action: Addressing Historical and Ending Contemporary Racial Inequities</a>		
<b>WIC HISTORY &amp; MISSION</b>		
<input type="checkbox"/> Become familiar with the philosophy and mission of WIC <a href="#">History of WIC – part 1</a>		
<input type="checkbox"/> <a href="#">History of WIC – part 2</a>		
<input type="checkbox"/> <a href="#">WIC History &amp; What You Do Works</a>		
<input type="checkbox"/> Understand the history and mission of WIC; Describe eligibility requirements & participation; describe services & benefits offered by WIC  WIC 101 Interactive Training – steps to complete: (must create account first) 1. Go to <a href="https://wiclearning.percipio.com">https://wiclearning.percipio.com</a> 2. Click “New here? Create an account” link 3. Complete the registration form 4. Click this link & launch course - <a href="#">WIC 101</a>		
<b>WIC TERMINOLOGY *</b>		
<input type="checkbox"/> Understand the basic WIC Journey vocabulary and common abbreviations used in WIC.		

Training Coordinator to discuss: 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, WIC ID Card; WIC income guidelines; Adjunct Income Eligibility etc		
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**INTRODUCTION TO CLIENT ELIGIBILITY & BENEFITS \***

Provide an overview of eligibility determination process and how benefits are delivered:		
<input type="checkbox"/> - <a href="#">What is WIC and who is eligible</a> - review outreach brochure		
<input type="checkbox"/> - <a href="#">Client Eligibility &amp; Benefits Procedure</a> (ID, Income, residency, nutrition risk)		
<input type="checkbox"/> - <a href="#">Categorical eligibility</a>		

**FOOD BENEFITS \***

Discussion with your LA Vendor Manager as you review the following:		
<input type="checkbox"/> <a href="#">Nebraska WIC Approved Foods List</a>		
<input type="checkbox"/> Locate & review the Approved Food List on the WIC Shopper App		
<input type="checkbox"/> Visit with Staff to identify specific store brands in your area and where these items are listed on the food brochure		
<input type="checkbox"/> Locate & review the list of WIC Approved Stores in your area		
<input type="checkbox"/> Using the food brochure for help, complete the <a href="#">WIC Approved Foods activity worksheet</a> ; <u>Bring any questions to training clinic</u>		
<input type="checkbox"/> Discuss with your training coordinator: <a href="#">Basic WIC Food Packages</a> and <a href="#">Contract Formula</a> that WIC Provides		
<input type="checkbox"/> 6.10.22 <a href="#">All staff Webinar recording</a> on new foods that started July 2022 Passcode: yeVK4?9+		

**NUTRITION BENEFITS \***

<input type="checkbox"/> Discuss with LA Training Coordinator:		
<input type="checkbox"/> Nutrition & breastfeeding educational materials available at your clinic; where are they located		
<input type="checkbox"/> Take some time to review the written nutrition & breastfeeding educational materials that WIC provides		
<input type="checkbox"/> Who provides nutrition education at your clinics?		
<input type="checkbox"/> Who are the breastfeeding experts at your clinic?		
<input type="checkbox"/> Do you have breastfeeding peer counselors?		

**REFERRAL BENEFITS \***

Discuss with LA Training Coordinator:		
<input type="checkbox"/> Referral resources available in your service area		
<input type="checkbox"/> Contact information for referral resources		
<input type="checkbox"/> Special needs populations that your agency serves		
<input type="checkbox"/> Programs your agency typically refers to		
<input type="checkbox"/> Show the listing of referral resources listed in Journey		
<input type="checkbox"/> Discuss what pamphlets or brochures your clinic has available for referrals to other programs; Where are they located; Which ones are most frequently used		

**WIC CLINIC SITES \***

<input type="checkbox"/> How many WIC clinics your agency offers		
<input type="checkbox"/> Your WIC clinic locations, days open, hours		
<input type="checkbox"/> WIC clinic locations across the state and how to contact		

<input type="checkbox"/>	Identify any other WIC clinics in the same city as my WIC clinic		
<input type="checkbox"/>	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		
<b>WIC APPOINTMENTS *</b>			
Discuss with LA Training Coordinator:			
<input type="checkbox"/>	<a href="#">Clinic Flow</a> – overview of basic certification appointment flow		
<input type="checkbox"/>	How your clinic schedule is set		
<input type="checkbox"/>	How to you read the Journey appointment schedule		
<input type="checkbox"/>	How to read the family panel		
<input type="checkbox"/>	How to know when to schedule the next appointment		
<input type="checkbox"/>	How to know what type of appointment to schedule		
<input type="checkbox"/>	<a href="#">Basic WIC Appointment Types in Journey</a>		
<input type="checkbox"/>	<a href="#">Length of Certification Periods</a>		
<input type="checkbox"/>	<a href="#">Processing Standards</a>		
<b>WIC CLINIC OBSERVATIONS *</b>			
Rights & Responsibilities: Observe other WIC clerks working with clients during appointments as they review rights and responsibilities at certifications at the beginning of the visit and follow along using the job aids below:			
<input type="checkbox"/>	- <a href="#">Rights &amp; responsibilities – (detailed long version)</a>		
<input type="checkbox"/>	- <a href="#">Rights &amp; responsibilities – (short summary version)</a>		
<input type="checkbox"/>	- take note of how and when clients sign the signature pad for rights and responsibilities; how do staff explain what the client is signing?		
<input type="checkbox"/>	New clerk to practice reviewing rights & responsibilities with staff and or clients and be prepared to demonstrate this with real clients when at the WIC training center. Bring your personal copy of rights and responsibilities with you to the training center.		
<input type="checkbox"/>	Practice long version – new certs		
<input type="checkbox"/>	Practice short version - recerts		
<input type="checkbox"/>	<a href="#">Right &amp; Responsibilities – Procedure Reference</a>		
<b>Answering Phone/Making Appointments:</b>			
<input type="checkbox"/>	Observe how staff answers the phone at your clinic		
<input type="checkbox"/>	Observe staff as they enter appointments into Journey		
<input type="checkbox"/>	Observe how staff mark appointments as arrived or no show		
<input type="checkbox"/>	Review WIC Procedure on <a href="#">Processing Standards</a> to become familiar with "time frames for eligibility determination"		
<b>Collecting &amp; Documenting Proof in Journey:</b>			
<input type="checkbox"/>	Observe clerical staff review & document proof of ID		
<input type="checkbox"/>	Observe clerical staff review & document proof of residency		
<input type="checkbox"/>	Observe clerical staff review & document proof of income		
<input type="checkbox"/>	Review <a href="#">Proof Required at Certification Summary Sheet</a>		
<input type="checkbox"/>	Review WIC Procedures regarding proof required		
<input type="checkbox"/>	<a href="#">Client/Guardian Identification</a>		
<input type="checkbox"/>	<a href="#">Income Determination &amp; Documentation</a>		
<input type="checkbox"/>	<a href="#">Residency Eligibility &amp; Documentation</a>		

	Observe a variety of WIC appointment types from beginning to end (from the clerk to the CPA) to get the big picture. At a minimum try to observe:		
<input type="checkbox"/>	3 - full new certs (1 pregnant woman, 1 mom/baby, 1 child)		
<input type="checkbox"/>	3 - full recerts (1 pregnant woman, 1 mom/baby, 1 child)		
<input type="checkbox"/>	Food Benefit list explanations using flip chart - (3 pregnant woman, 3 mom/baby, 3 child)		
<input type="checkbox"/>	3 - Explain how to download and use the WIC Shopper App		
<input type="checkbox"/>	2 - Midcerts		
<input type="checkbox"/>	2 - nutrition ed visits		
<input type="checkbox"/>	1 - height/weight/hemoglobin check		
<input type="checkbox"/>	1 - breastfeeding education		
<input type="checkbox"/>	1 - Transfer		
<b>EWIC &amp; JOURNEY INTRODUCTORY VIDEOS *</b>			
<input type="checkbox"/>	- Review Journey videos – <i>we are in the process of updating these videos</i>		
	- <a href="#">EWIC is Here - Using the Flip Chart to help explain EWIC</a>		
<input type="checkbox"/>	- <a href="#">Explaining eWIC to Clients – sample 13 min</a> - using flip chart		
<input type="checkbox"/>	- <a href="#">Basic Journey Terminology – Categories (4 min)</a>		
<input type="checkbox"/>	- <a href="#">Navigation Basics Video (4 minutes)</a>		
<input type="checkbox"/>	- <a href="#">Search for Families and Participants Video (7 min)</a>		
<input type="checkbox"/>	- <a href="#">Create a New Family &amp; Schedule an Appointment (10 min)</a>		
<input type="checkbox"/>	- <a href="#">Food Package Introduction (9 minutes)</a>		
<input type="checkbox"/>	- <a href="#">Breastfeeding Mom &amp; Baby Pairs (14 min)</a>		
<b>COMPUTER PRACTICE / JOURNEY TRAIN*</b>			
Training Coordinator to help new staff practice in Journey Train: To complete activities on Journey Train your new staff member needs their account set up. While we do not want you to share passwords, while waiting for trainee to get their own access to Journey Train, LA Training Coordinator may log in to Journey Train and demonstrate on her own account. She may help trainee work through these items on the Training Coordinators account.			
Logging on			
<input type="checkbox"/>	- Logging in with their assigned user-name and password into Journey Train; do not share logons		
<input type="checkbox"/>	- Logging in to your clinic		
Search			
<input type="checkbox"/>	- Simple search by family ID		
<input type="checkbox"/>	- Advanced search by name		
<input type="checkbox"/>	- Advanced search by date of birth		
<input type="checkbox"/>	- Advanced search by home phone		
<input type="checkbox"/>	- Wild card search		
<input type="checkbox"/>	- Soundex search		
<b>Making new Families / Scheduling</b>			
Practice making 8-10 new families in Journey train and then schedule them for their first certification appointments. In your families include a variety such as:			
<input type="checkbox"/>	- 3 year old child		
<input type="checkbox"/>	- 1 year old child		
<input type="checkbox"/>	- 1 month infant		

<input type="checkbox"/>	- 7 month infant		
<input type="checkbox"/>	- pregnant woman		
<input type="checkbox"/>	- brand new baby		
<input type="checkbox"/>	- schedule appointments for these families in Journey train – write down their family ID number in the comments column so you trainer or training coordinator can check them over		
<input type="checkbox"/>	- practice moving appointments		
<b>CONFIDENTIALITY *</b>			
<input type="checkbox"/>	- Discuss the importance of client confidentiality with your WIC Director - <a href="#">confidentiality of client information</a> procedure		
<b>WEBSITE SEARCH SCAVENGER HUNT (BEFORE OR AFTER TRAINING CLINIC)</b>			
<input type="checkbox"/>	Get familiar with the Nebraska WIC resources and where things are located that are helpful for families and for staff		
<input type="checkbox"/>	Explore the Nebraska WIC Website: <a href="https://dhhs.ne.gov/WIC">https://dhhs.ne.gov/WIC</a>		
<input type="checkbox"/>	<b>Home Page</b> - Report WIC Fraud button - Contact WIC Near You button - Local Agency Staff button		
<input type="checkbox"/>	<b>WIC Families Page</b> - Shopping with eWIC brochure - Setting eWIC card PIN - What if my PIN doesn't work - Reporting lost, stolen, damaged eWIC cards		
<input type="checkbox"/>	<b>Health Care Provider Section</b> - NE WIC Contract Formula Sheet - Physician authorization forms Common food package cheat sheets with pictures		
<input type="checkbox"/>	<b>Local Agency Staff Section</b> - WIC Procedures & policy memos - Examine procedures in functional area 8, Certification, Eligibility & Coordination of Services and look through the procedures in this section. These relate to clerk duties - Under New Staff Training: Locate clerical job aids and resources - Nutrition Education Materials (state provided)		
<input type="checkbox"/>	<b>Explore the Web:</b> Take a few minutes to see what you find when you search for WIC on the website. View as time allows before and after you attend training clinic. Ie. <a href="#">USDA WIC Works Resource System</a> ; <a href="#">USDA FNS WIC</a>		
<b>CLINIC MATERIALS &amp; SUPPLIES</b>			
<input type="checkbox"/>	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?		
<input type="checkbox"/>	What brochures and materials does your clinic commonly provide to WIC clients for nutrition education and for referrals to other programs		
<input type="checkbox"/>	Review & become familiar with the content provided in these brochures and handouts		
<input type="checkbox"/>	<u>Make a folder</u> including 1 of each of these commonly used materials for your own reference		

<input type="checkbox"/>	Discuss clinic process for ordering WIC forms, food brochures, educational materials		
<input type="checkbox"/>	Office supplies		
<input type="checkbox"/>	Who is responsible for ordering / contact information		
<b>SCANNING DOCUMENTS INTO JOURNEY</b>			
	Discuss with training coordinator		
<input type="checkbox"/>	Who is responsible for scanning documents into Journey		
<input type="checkbox"/>	<a href="#">What documents need to be scanned</a>		
<input type="checkbox"/>	How to scan documents in Journey		
<input type="checkbox"/>	Describe the clerks role in handling PAF's		
<b>WIC STORE VISIT (before or after training clinic)</b>			
<input type="checkbox"/>	Visit a WIC Store with your LA Vendor Manager		
<input type="checkbox"/>	<a href="#">Install the WIC shopper App on your phone - directions</a>		
<input type="checkbox"/>	Learn to use the WIC Shopper App to identify WIC		
<input type="checkbox"/>	Observe a WIC purchase		
<input type="checkbox"/>	Identify which WIC approved breads your store carries		
<b>FOSTER CARE (After Training Clinic – complete within 4 weeks )</b>			
<input type="checkbox"/>	Listen to the <a href="#">foster care</a> webinar from 5.12.2020 For questions, discuss with your WIC Director or call Marge Blankenship, our State WIC Clinic Services Coordinator.		

Additional comments from WIC Director/Training Coordinator about how the pre-training went for this new clerk:

Please type your name to agree that the steps in this form have been completed:

Name of WIC staff who completed this form:

Date:

For questions, please contact Jackie Johnson at [jackie.johnson@nebraska.gov](mailto:jackie.johnson@nebraska.gov). Please save a copy for your records. Notify Jackie if there are any updates needed to this form.