

Local Agency WIC Directors Calendar of Tasks

	Task	When Completed	Source of Information/Details
Monthly	Journey Computer System Reports	Run each month for LA use	Journey system
	Caseload reports	LA can run their own reports by clinic after the 5 th of each month	Caseload Report : Participation With Benefits
	Budget Tracking	Track monthly for LA use	LA fiscal reports for budget
	Personal Activity Report	Monthly	Staff time reported. Use PAR Form or Staff time sheets. Keep on file at LA.
	Financial Status Reports (NSA, BFPC, Other)	Submit monthly for state reimbursement	Use SA FSR Form. Information from LA financial system.
Annually	Inventory List/Property Schedule	Annually in November	Use SA Form. Record all purchases made during the FFY from Purchase Requests and all dispositions.
	Homeless Shelter Assessment	Annually –usually beginning of new Calendar Year	First visit must be in person; routine follow-up visits can be made by phone.
	Public Notice of WIC Benefits	Annually	Publicize availability of WIC Benefits within LA service area
	Civil Rights Training	Annually for all WIC Staff	LA Training if not provided by State Agency
Ongoing & Annually	Award Letter Documents--Audit Confirmation, FFATA Forms	Completed, signed and returned to SA upon receipt of Award and any amendments	Mailed from SA to LA Executive Director, cc to WIC Director at beginning of new federal fiscal year
	Budgets	Budget and narrative due annually, 30 days after award letters are received and signed by local agency	Use SA Forms. Budget information is based on prior history and future needs.

	Task	When Completed	Source of Information/Details
	Local Agency Planning (Ongoing & annually)	Part I and Part II: LA Plan –Guidance provided in August, usually due in October	Local Agency Plan Guidance provided by SA
	LA Self Monitoring of (clarify areas)	Annually/on-going	LA forms provided by State Agency
	Performance Measures	On-going, LA reviews reports upon receipt	Performance Measure Reports— temporarily on hold
	Clinic Management and Administrative Survey	Every year in approximately January	Questionnaire with data from the state
	Staff Training	At Least Annually for All Staff Two Times per Year for CPA staff Must be relevant for individual staff positions	Local Agency determines
As Needed	Purchase Requests	As needed	Submitted requests must be approved prior to purchase
	Outreach and Educational Items Requests	As needed	Submitted requests must be approved prior to purchase
	Clinic Changes	As needed	All clinic moves, openings and closings require minimum 60 days notification by LA and prior approval from SA
	Ordering Educational Materials and Forms	As needed	Order Form for WIC Educational Materials or WIC Forms
	New WIC Employee Training	As needed	Participate in Required State Agency Training as Directed by the State Training Coordinator
	Records Disposal Requests	As needed	Written request and approval required before disposal