

TRAINING CLINIC – SELF ASSESSMENT

Refresher - Clerk Training

Directions: The following pages outline the key areas that will be covered during the Clerk training. Please complete the self-assessment by identifying which areas you feel comfortable with, and which areas you would like more information or training in. There is also an area to write in comments or specific questions.

Save this form on your computer, type in your responses, and send it back to me to share with training clinic.

You may email or fax the form back to me, and I will share the information with training clinic.

Tell us about yourself and your experience working with WIC so far. What would you like to learn coming to training clinic:

**Self-Assessment Report
 Refresher - Clerk Training**

Name:	
LA Name:	
Training Clinic Dates:	

Completed by trainee

Cert & Enrollment	Feel OK with this area	Want more info or training	Questions I have that need answered:
Purpose of WIC			
WIC eligibility requirements			
WIC program explanation			
Rights & Responsibilities			
Responsible Party & 2 nd RP			
Proof of ID			
Proof of Address			
Voter Registration			
Language			
Race Ethnicity			
Race/migrant/homeless			
Income eligibility			
Proof of income			
Income calculate			
Adjunct eligibility			
Family size			
Status & length of cert periods			
No proof box			
Income letter			
Benefit Renewal Notice			
6 mo. Notice to "some BF" women			

Ineligibility letter			
Alternative shopper			
	Feel OK with this area	Want more info or training	Questions I have that need answered:
Enter computer information			
Referrals to/from WIC documented			
Enroll new clients			
Recertify clients			
Re-enroll clients			
Presumptive eligibility			
Customer service			
Processing standards			
Statement of status form			
Demographic changes to records:			
-Status change during cert period			
-Custody change			
-Changes foster care placement			
Complete VOC			
Term client records			
Reversal of termination			

Food Package Unit:	Feel OK with this area	Want more info or training	Questions I have that need answered:
Foods provided by WIC			
Two types of WIC checks			
Explain parts of a WIC check			
Find a WIC approved store			
Match food pkg to client status			
Identify food pkg number			
FI types/ foods per check			
WIC BF philosophy			
WIC food pkg supports BF			
Basic food pkg – BF mom & baby			

Assess BF status; match mom/baby			
Basic food package – IFF infants			
Contract formula			
Respond to formula requests			
Use of PAF – special formulas			
Formula approval – when call state			
Changing food packages			

Check Distribution	Feel OK with this area	Want more info or training	Questions I have that need answered:
Use of equipment to print checks			
Beginning of day			
Create the check register			
Fill out the check register			
Print checks			
Confirm for accuracy			
Issue checks			
2 nd months checks			
ID folder			
WIC foods booklet			
Void checks			
Replace checks			
Check look-up			
Lost & stolen check report			
Additional benefits report			
Ineligibility			
Other:			

CERTIFICATION & ENROLLMENT – KEY SKILLS

Purpose of WIC

Explain purpose of WIC

WIC eligibility requirements

Explain certification process and eligibility requirements to clients

WIC program explanation

Orient participants to the WIC program by providing a program explanation (using laminated sheet)

Rights & Responsibilities

Review participant rights and responsibilities with clients according to procedure using the laminated sheet, and document on signature form

Staff asks clients if they understand or have any questions

Responsible Party & 2nd RP

Determine responsible parties and document RP names on the signature form:

- Explain the differences between RP & 2nd RP
- Explain to clients who can be a responsible party; the roles of an RP
- Understand the procedure to change RP

Proof of ID

Recognize acceptable documents for proof of identity and document correctly on signature form

Utilize job aids to determine acceptable proof of ID

Proof of Address

Recognize acceptable proof of address and document correctly on signature form

Utilize job aids to determine acceptable proof of address

Voter Registration

Offering and documenting voter registration

Race Ethnicity

Assess and document race and ethnicity status with sensitivity to client using laminated race/ethnicity card

Language;

race/migrant/homeless/refugee

Assess language, migrant, homeless or refugee status with sensitivity to client and correctly document in computer using correct codes

Income Eligibility Assessment

Assess income using standardized income questions and correctly document

Know where to find the income eligibility guidelines

Determine when Gross income vs net income is used for income assessment

Proof of income

Recognize acceptable proof of income and document on signature form

Know which references or job aids are available to use when assessing income

Assessing Adjunct eligibility

Determine adjunct eligibility status and correctly document

Verifying Adjunct Eligibility By Calling

Call 800 number to "verify" adjunct eligibility status

How to document that adj eligibility was verified

Awareness that verbal income statements are acceptable for clients that have been verified as adjunct eligible

Adjunct Eligibility – if Not Verified

What to do if you can't verify adjunct eligibility?

What is "reported" and how do you document "reported" adjunct eligibility?

Assessing income documents to determine income eligibility

Family size

Accurately assess family size and document in computer

Status & length of cert periods

Length of certification period for each status

No proof box

Location of the no proof box on the signature form
When and how to complete this section
Follow-up required

CONTINUED – CERTIFICATION & ENROLLMENT

Income letter

What is an income letter; when are they used; and how to complete them and explain them to clients

Yellow notification form

Explaining the notification form to clients and what to bring to next visit to recertify

- What is the Yellow notification form
- When to issue a notification form
- How to complete the notification form
- Documenting that the form was given on the signature form

6 mo. Notice to “some BF” women

Describe the 6 month notice for Some BF women form, when it is used, and how it impacts clients

- Understand how the amount of breastfeeding being done directly impacts their ability to continue getting a food package
- Explain what it means for the clients that remain “some breastfeeding”; what it means for clients that choose to breastfeed more

Ineligibility letter

What is an ineligibility letter and when must it be given

Alternative shopper

Define alternative shopper by explaining their role and who can be one

Completing the alternate shopper card

How to offer and complete the alternate shopper card

Entering computer information

Referrals to & from WIC documented in computer

Enrolling new clients

Properly enroll new clients

Recertifying clients

Properly enroll clients that are recertifying

Re-enrolling clients

Properly re-enroll clients

Re-enrolling clients

Properly re-enroll clients

Presumptives

- Initial visit – process clients correctly
- Return visit – process clients correctly

Customer service

Processing standards

Know the processing standards for different categories of applicants

Statement of status form

Identify when a Statement of Status Form needs to be completed; and be able to correctly complete the form

Demographic changes to records:

Identify situations when demographic changes to records need to be made, and know how to correctly make them.

- Status change during current cert period

- Custody change
- Changing foster care to a different foster care

Transfers & VOC

Understand the process for transferring clients in or out of the clinic

Understand when and how to complete a VOC card

Terminating client records

Know the process for how and when to terminate client records and the associated termination codes

Know how and when to reverse a termination

FOOD PACKAGE & CHECK PRINTING UNIT – KEY SKILLS

Foods Provided by WIC

Describe the foods provided by WIC to participants

Two types of WIC checks

Explain the difference between the standards check and the fruit and veggie check to participants

Explain parts of a WIC check to participants

Findings a WIC approved store

Using vendor look-up determine if a store is WIC approved

Matching food package to client status

Use job aids to help identify basic food packages for each status

Identify food package number

FI types/foods per check

WIC BF philosophy

How WIC food package supports BF

Explain how the more BF a mom is doing, the more foods she is eligible to receive. For example, fully BF moms receive the largest food package and get to remain on the program 6 months longer than non-BF women. (Pyramid job aid helps to visually show the relationship.)

Basic food package – Breastfeeding Mom and Baby. Describe the relationship between amount of BF and type of food package. The type of food package is determined by the amount of BF she is

doing. Learn to use helpful job aids to describe a BF food packages.

Assess BF status; match mom and baby

Clerks start all BF clients out as BF 1; then CPA assesses BF status and updates it accordingly, and assigns the appropriate food package

Basic food package – IFF infants

Contract formula

Explain the contract formulas that WIC provides using job aids as needed.

Responding to requests for specialty formula and use of PAF. Understand what a PAF is and when a PAF needs to be completed.

When to call the state for formula approval

Changing food packages

Understand a clerk's role in responding to requests for food package changes

Check Printing

Use of equipment to print checks

Demonstrate how to use the printer to print checks using job aid for instructions; know how to care for the printer

Run Beginning of day

Use beginning of day procedure flow chart to test print prior to printing any checks.

Create check register

Create and print a check register for the range of checks you will use in clinic, use flow chart to help remember the steps.

Filling out the check register and explaining to clients

Correctly fill out the check register when recording food instruments; explaining the check register to clients

Printing checks

Print one check at a time – using flow chart

Confirming accuracy

Importance of confirming check accuracy; your role in confirming check accuracy; client's role in confirming check accuracy. Remember to involve client in the process. Direct clients how to review their checks for accuracy and how and why to sign on the check register.

Issuing checks

Process of issuing checks and resources for staff to use with clients when issuing checks;

2nd months checks

Use bimonthly envelope to separate the 2nd month checks

ID folder

Properly complete and explain the ID folder and its contents

WIC foods booklet

Explain foods on checks to clients while pointing-out or foods and how to find them in the approved food book

Voiding checks

Demonstrate the steps to void checks that are returned to clinic

Replacing checks

Determine when it is necessary to replace checks and common reasons for replacing them

Check look-up

Demonstrate how and why to use the food instrument look-up function

Lost and stolen check report

Complete the lost and stolen check report- how and when to complete report

Additional benefits report

Complete the additional benefits report How and when to complete report

Ineligibility

Explain why clients may be ineligible for WIC.
Understand when to provide and how to complete the ineligibility letter, and know where to document that the ineligibility notice was given on the signature form