



Nebraska WIC Program


Pre-Training Activities Plan - Clerk Check List


Below are the activities that new clerks need to complete as phase 1 of their training. This training is to be completed at the new employee's home local agency WIC site. Use the check list below to document dates planned and completed. All tasks need to be completed before attending phase 2 ie WIC Training Center (done remotely until further notice).

If staff are not able to complete these pre-training activities, let us know so we can reschedule their Remote WIC Training 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. The minimum required activities before starting phase 2 of training are indicated with this notation. *

New Staff Name:	LA Training Name:		
	Dated planned	Date Completed	Comments
<p>*Civil Rights Training</p> <p>- Civil Rights & WIC – Required Training Video 1 hr 30min</p>			
<p>*About WIC – Introductory Videos</p> <p>- History of WIC – part 1</p> <p>- History of WIC – part 2</p> <p>- WIC History & What You Do Works</p> 			
<p>* WIC Terminology</p> <p>- Training Coordinator discuss basic WIC Journey vocabulary or abbreviations used:</p> <p>- 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</p>			
<p>* Benefits of WIC & Eligibility</p> <p>- Discuss benefits of WIC</p> <p>- Discuss general eligibility requirements (ID, Income, residency, nutritional risk)</p> <p>- Review Procedures: Categorical Eligibility</p> 			




	Dated planned	Date Completed	Comments
<p>*Food Benefits – Discuss with your LA Vendor Manager</p> <ul style="list-style-type: none"> - Review Nebraska WIC Approved Foods List - Located & review the WIC Approved Food List on the WIC Shopper App - Visit with Staff to identify specific store brands in your area and where listed on the food brochure - locate & review the list of WIC Approved Stores in your area - Using the food brochure for help, complete the WIC Approved Foods activity worksheet; Bring any questions to training clinic - Discuss with your training coordinator: Basic WIC Food Packages - and Contract Formula that WIC Provides 			
<p>*Nutr Ed Benefits – Discuss with LA Training Coordinator:</p> <ul style="list-style-type: none"> - Nutrition & breastfeeding educational materials available at your clinic; where are they located - Take some time to review the written nutrition & breastfeeding educational materials that WIC provides - Who provides nutrition education at your clinics? - Who are the breastfeeding experts at your clinic? - Do you have breastfeeding peer counselors? 			
<p>*Referral Benefits – Discuss with LA Training Coordinator:</p> <ul style="list-style-type: none"> - Referral resources available in your service area - Contact information for referral resources - Special needs populations that your agency serves - Programs your agency typically refers to; - Show the listing of referral resources listed in Journey - Discuss what pamphlets or brochures your clinic has available for referrals to other programs; Where are they located; Which ones are most frequently used? 			
<p>*WIC Clinic Sites – Discuss with LA Training Coordinator:</p> <ul style="list-style-type: none"> - How many WIC clinics your agency offers - Your WIC clinic locations, days open, hours - WIC clinic locations across the state and how to contact - Identify any other WIC clinics in the same city as my WIC clinic - Explore the Nebraska WIC website to find contact information for WIC programs across Nebraska; - Click the “contact WIC near you” link located on the home page; enter a zip code to find WIC locations in that area 			


	Date Planned	Date Completed	Comments
<p>*WIC Appt Types - Discuss with LA Training Coordinator:</p> <ul style="list-style-type: none"> - How your clinic schedule is set up - How to you read the Journey appointment schedule - How to read the family panel - How to know when to schedule the next appointment - How to know what type of appointment to schedule - Basic WIC Appointment Types in Journey - Review Procedure: Length of Certification Periods 			
<p>WIC Clinic Observations</p> <p>*<u>Rights & Responsibilities</u></p>  <p>Observe clerk staff working with real WIC clients as they review Rights & Responsibilities at Certifications at the beginning of the visit:</p> <ul style="list-style-type: none"> - Review: Rights & responsibilities (detailed version) - Review: Rights & Responsibilities (summary) - Take note of how and when clients sign the signature pad for rights & responsibilities; how do staff explain what the client is signing? - Practice: New Clerk to practice reviewing rights & responsibilities with staff and or clients and be prepared to demonstrate this with real clients at training clinic - Bring your personal copies of the rights and responsibilities to training clinic to use 			<p>Name the <u>staff</u> & <u>clinic</u> that was observed:</p>
<p>*<u>Answering Phone/Making Appts</u></p> <ul style="list-style-type: none"> - Observe how staff answers the phone at your clinic - Observe staff as they enter a few appointments into Journey - Observe how staff mark appointments as arrived or no show - Review WIC Procedure on Processing Standards to become familiar with "time frames for eligibility determination" 			<p>Name the <u>staff</u> & <u>clinic</u> that was observed:</p>
<p>*<u>Collecting & Documenting Proof in Journey</u></p> <ul style="list-style-type: none"> - Observe clerical staff review & document proof of ID - Observe clerical staff review & document proof of residency - Observe clerical staff review & document proof of income - Review Proof Required at Certification Summary Sheet - Review WIC Procedures regarding proof required: <ul style="list-style-type: none"> o Client/Guardian Identification o Income Determination & Documentation o Residency Eligibility & Documentation 			<p>Name the <u>staff</u> & <u>clinic</u> that was observed:</p>


	Date Planned	Date Completed	
<p style="text-align: right;"></p> <p>*WIC Clinic Observations – Continued</p> <p>All Appointment categories of WIC Clients (pregnant, BF, Not BF, child, infant)</p> <p>Discuss with your training coordinator your role in different types of appointments listed below, then observe multiple appointments as listed below. 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 see the big picture.</p> <ul style="list-style-type: none"> - 3 Full Cert or Recerts (1 preg woman, 1 mom/baby, 1 child) - 3 Food Benefit List Explanation (using flip chart & brochures) - 3 Explain how to download and use WIC Shopper App - 2 Midcerts - 2 Nutrition ed - 1 Height/weight/hemoglobin check - 1 BF education 			Identify clinic names & dates observed

	Dated planned	Date Completed	Comments
<p>*Journey Navigational Videos</p> <p>eWIC introductory Video (4 min)</p> <p>Explaining eWIC to Clients – sample 13 min</p> <p>Basic Journey Terminology – Categories (4 min)</p> <p>Navigation Basics Video (4 minutes)</p> <p>Search for Families and Participants Video (7 min)</p> <p>Create a New Family & Schedule and Appts (10 min)</p> <p>Food Package Introduction (9 minutes)</p> <p>Breastfeeding Mom & Baby Pairs (14 min)</p>			



	Dated planned	Date Completed	Comments
<p>*Computer practice / eWIC Journey Train LOGGING IN</p>  <p>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 my log in to Journey Train and demonstrate. She may help trainee work through these items on the Training Coordinators account.</p> <p>Training Coordinator help new staff practice the following:</p> <ul style="list-style-type: none"> - Logging in with their assigned user name and password into Journey Train; do not share logons - Logging in to your clinic 			
<p>* SEARCHING</p> <p>Training Coordinator help new staff practice several of the following:</p> <ul style="list-style-type: none"> - Simple search by family ID - Advanced search by name - Advanced search by date of birth - Advanced search by home phone - Wild card search - Soundex search 			
<p>* Making Family/Scheduling Apt</p> <ul style="list-style-type: none"> - Practice <u>making up 8-10 new families</u> in Journey Train & then <u>schedule</u> them for their first certification appointments. In your families include a variety such as: <ul style="list-style-type: none"> 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 - 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 - Practice moving appointments 			Record the family #'s that the trainee made and bring the numbers with you to training clinic
<p>*Confidentiality</p> <ul style="list-style-type: none"> - Discuss importance of client confidentiality with your WIC Director 			
<p>Website Search Scavenger Hunt (Before or After Training Clinic)</p>  <p>Explore the Nebraska WIC Website: https://dhhs.ne.gov/WIC</p> <p>Home Page</p> <ul style="list-style-type: none"> - Report WIC Fraud ____ - Contact WIC Near You ____ <p>WIC Families Section – know the information on this webpage so you can refer families if needed</p>			

<ul style="list-style-type: none"> - Shopping with eWIC brochure ___ - using eWIC Card ___ - Setting eWIC Card pin ___ - and more.... <p>Health Care Provider Section</p> <ul style="list-style-type: none"> - NE WIC Contract Formula Sheet ____ - Physician authorization forms: Infant __ Children __ Women __ - Common food package cheat sheets (with pictures) ___ <p>Local Agency Staff Section</p> <ul style="list-style-type: none"> - WIC Procedures & policy memos ____ - Expand 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) ____ <p>Explore the Web:</p> <p>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. Examples of what you might find:</p> <p>Arizona Training Videos on WIC Customer Service</p> <ul style="list-style-type: none"> - Watch as time allows before and after you attend training clinic 			
<h2 style="color: green;">Clinic Materials & Supplies</h2> <ul style="list-style-type: none"> - 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? - What brochures and materials does your clinic commonly provide to WIC clients for nutrition education and for referrals to other programs - Review & become familiar with the content provided in these brochures and handouts - <u>Make a folder</u> including 1 of each of these commonly used materials for your own reference - Discuss clinic process for ordering WIC forms, food brochures, educational materials - Office supplies - Who is responsible for ordering / contact information 			
<h2 style="color: green;">Clinic Observations</h2> <h3 style="color: green;">Scanning Documents into Journey</h3>  <p>Discuss with training coordinator</p> <ul style="list-style-type: none"> - Who is responsible for scanning documents into Journey - What documents need to be scanned - How to scan documents in Journey - Describe the clerks role in handling PAF's 			
<h2 style="color: green;">WIC Store Visit (before or after training clinic)</h2> <ul style="list-style-type: none"> - Visit a WIC Store with your LA Vendor Manager 			

<ul style="list-style-type: none"> - Install the WIC shopper App on your phone - directions - Learn to use the WIC Shopper App to identify WIC foods - Observe a WIC purchase - Identify which WIC approved breads your store carries 		
<p style="color: green; font-weight: bold;">Foster Care (After training clinic)</p> <ul style="list-style-type: none"> - Listen to the foster care webinar from 9.30.2020 - Complete the Survey after watching the 9.30.2020 webinar - Listen to the Update on Kinship Placement-Moving Children from 2.26.21 - Listen to the Update on New Placement papers 2.26.21 		<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>
<p style="color: green; font-weight: bold;">*Training Coordinator Name & Contact</p> <p>Identify name/contact information of your Local Agency Training Coordinator responsible for helping new staff complete these activities</p>		

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. 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 request assistance in findings ways to help you help your staff complete these items. If during COVID, you need assistance setting up clinic observations for your staff over zoom, please contact Jackie Johnson.

Also, here is a link to [Clerk 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. You may want to make photo copies of the ones that are most used by your new staff.

NAME OF STAFF COMPLETING THIS FORM:

DATE FORM COMPLETED:

Continued... See next page for reminders for training coordinators

New Staff Training - Reminders for Training Coordinators: Journey Train New User Request Form –

- Please complete this form for your new staff so that our Help Desk can get your new staff access to the computer system
- After this form is submitted to our WIC help desk, your new staff will receive their own user ID and password to log into Journey Train.
- Please allow up to 7-10 business days for the user logon information to be generated and sent back.
- Once new staff receives the logon information, they will use this information to log into eWIC Journey Train and complete the required pre-training computer practice activities before coming to the training center. Please help guide your new staff through the logon process and if you have problems contact our WIC help desk. *(If you encounter problems getting new staff get logged on to eWIC Journey TRAIN, please contact the WIC Help Desk for assistance. Do NOT use someone else's logon and password for new staff.)*
- After new staff attend the remote WIC training center, our WIC help desk will "turn on" their access to eWIC Journey Production. They will use the same user name and password to access eWIC Journey Production as they did to access eWIC Journey Train, but access to the real eWIC Journey Production system won't be turned on until their training is completed.

Registration to Verify Medicaid

- Start the process to register your new WIC staff to assess Medicaid on the phone or the website (for any staff assigned Clerical Roles)
- For phone verification complete the one page form -
 - Scan and email the completed form to Marge
 - As soon as the form is submitted, staff will be able to start using phone verification option when they have been trained
- For web verification complete the 2 page fillable form on your computer -
 - Staff may type in their name where it asks for their signature
 - WIC supervisor may type in their name where it ask for their signature
 - Use "save as" to save the form; file name should be staff first name_last name
 - Attach the saved completed PDF file to an email and send to Marge Blankenship (do not scan and send)
 - Getting access for web verification takes longer. Access is granted to each employee by Medicaid usually within 2 weeks to 2 months. After Medicaid receives the assigned password, they send the information to WIC

Forms Completed and Submitted - checklist

Training Center Request Form (to request training session)	
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Journey Train New User Computer Request Form	
Medicaid Phone Verification Access – Confidentiality Form	
Medicaid Web Verification – Confidentiality Form	