

## ITCA WIC Program: Staff Observation Form

Reviewer:

Date:

Agency/Clinic:

WIC Staff #1:

WIC Staff #2:

Type of Appointment:

Client Category:

Client ID:

*\*Staff Initials only required if you observed more than one staff provide services to a client/family*

Staff Initials	ITEM	√ / i / -	COMMENTS
<b>Opening the Conversation – Certifier ONLY ( See Rubric Below for CPA)</b>			
	<ul style="list-style-type: none"> <li>• Greets client and establishes rapport.</li> </ul>		
	<ul style="list-style-type: none"> <li>• Sets the agenda (what will happen during appt. and time it will take)</li> </ul>		
	<ul style="list-style-type: none"> <li>• Asks permission</li> </ul>		
	<ul style="list-style-type: none"> <li>• If new certification, staff asked if client was on WIC before</li> </ul>		
<b>Hemoglobin</b>			
<b>Masimo</b>			
	<ul style="list-style-type: none"> <li>• Pediatric tester used or finger sized measured</li> </ul>		
	<ul style="list-style-type: none"> <li>• Non-dominant hand and either ring or middle finger (thumb can be used for small children) is used</li> </ul>		
	<ul style="list-style-type: none"> <li>• Gauge is right side up</li> </ul>		
	<ul style="list-style-type: none"> <li>• Arm is at or near heart level and cable runs on top of hand</li> </ul>		
	<ul style="list-style-type: none"> <li>• Client is instructed to remain still</li> </ul>		
<b>HemoCue</b>			
	<ul style="list-style-type: none"> <li>• Hands gloved prior to test and removing cuvette from container</li> </ul>		
	<ul style="list-style-type: none"> <li>• Fingertip wiped with alcohol and allowed to dry</li> </ul>		
	<ul style="list-style-type: none"> <li>• Tester chose either middle or ring finger (with no ring)</li> </ul>		
	<ul style="list-style-type: none"> <li>• Tester punctured on the side of tip of finger</li> </ul>		
	<ul style="list-style-type: none"> <li>• Blood sample was collected without roughly squeezing /milking finger</li> </ul>		
	<ul style="list-style-type: none"> <li>• Tester wiped away the first 2-3 drops of blood</li> </ul>		
	<ul style="list-style-type: none"> <li>• Tester allowed the drop of blood to become big enough to fill the cuvette, which was inserted into the drop of blood and filled in one continuous process</li> </ul>		
	<ul style="list-style-type: none"> <li>• Tester wiped off excess blood from cuvette and checked for air bubble</li> </ul>		
	<ul style="list-style-type: none"> <li>• Cuvette and lancet were discarded in a bio-hazard container</li> </ul>		
	<ul style="list-style-type: none"> <li>• Hands were washed or sanitizing gel used after testing</li> </ul>		
	<ul style="list-style-type: none"> <li>• Area is cleaned after client or paper towel was placed under supplies</li> </ul>		
	<ul style="list-style-type: none"> <li>• Hemoglobin results were correctly recorded in computer.</li> </ul>		
	<ul style="list-style-type: none"> <li>• Hemoglobin was taken at the appropriate time</li> </ul>		
<b>Weight</b>			
	<ul style="list-style-type: none"> <li>• Zero Scale (with or without paper)</li> </ul>		
	<ul style="list-style-type: none"> <li>• Removed clothing, outer clothing, shoes, in dry diaper etc.</li> </ul>		
	<ul style="list-style-type: none"> <li>• Center of scale</li> </ul>		

\*      √ = Complete, done correctly      - = Missing

i = incorrectly done

NA = Not applicable

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	<ul style="list-style-type: none"> <li>Measurement recorded on paper and in computer correctly and to the nearest ounce</li> </ul>		
	<ul style="list-style-type: none"> <li>Used paper and changed between clients (infants only)</li> </ul>		
<b>Height/Length</b>			
<b>Height</b>			
	<ul style="list-style-type: none"> <li>Positioned properly (shoes or hair clips/braids removed, knees straight, 2 people measured for children)</li> </ul>		
	<ul style="list-style-type: none"> <li>Measurement taken to closest 1/8"</li> </ul>		
	<ul style="list-style-type: none"> <li>Measurement recorded correctly on paper &amp; in computer</li> </ul>		
<b>Length</b>			
	<ul style="list-style-type: none"> <li>Positioned properly (shoes or hair clips/braids removed, both legs grasped and straightened, head against head piece, 2 people measured)</li> </ul>		
	<ul style="list-style-type: none"> <li>Measurement taken to closest 1/8"</li> </ul>		
	<ul style="list-style-type: none"> <li>Measurement recorded correctly on paper &amp; in computer</li> </ul>		
	<ul style="list-style-type: none"> <li>Paper used on recumbent board and changed between clients</li> </ul>		
<b>Qualifications</b>			
<b>Data Verification</b>			
	<ul style="list-style-type: none"> <li>Client name and date of birth is verified</li> </ul>		
<b>Ethnicity/Race</b>			
	<ul style="list-style-type: none"> <li>Tribal Affiliation/Ethnic origin Documented (Client self declares, staff asks, or assess visually)</li> </ul>		
<b>Income</b>			
	<ul style="list-style-type: none"> <li>Determined income correctly</li> </ul>		
	<ul style="list-style-type: none"> <li>Documented correctly (source, amount and proof or self-declare form)</li> </ul>		
	<ul style="list-style-type: none"> <li>Income eligibility test was completed by different staff member than did nutrition assessment</li> </ul>		
<b>Residency</b>			
	<ul style="list-style-type: none"> <li>Updated phone number, address, etc.</li> </ul>		
	<ul style="list-style-type: none"> <li>Matched addresses on demographics with proof</li> </ul>		
	<ul style="list-style-type: none"> <li>Documented correctly</li> </ul>		
<b>Identification</b>			
	<ul style="list-style-type: none"> <li>Verified For Client</li> </ul>		
	<ul style="list-style-type: none"> <li>Verified for Caregiver</li> </ul>		
	<ul style="list-style-type: none"> <li>Documented Correctly</li> </ul>		
<b>Information about mom</b>			
	<ul style="list-style-type: none"> <li>Information about mom is correctly documented</li> </ul>		
<b>Growth Grids</b>			
	<ul style="list-style-type: none"> <li>Showed appropriate growth grids to the caregiver</li> </ul>		
	<ul style="list-style-type: none"> <li>Explained growth grids or pregnancy weight grid correctly</li> </ul>		
<b>Health Interview</b>			
<b>Infant / Child</b>			
	<ul style="list-style-type: none"> <li>Infant feeding/Breastfeeding questions were asked and information recorded correctly</li> </ul>		

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	<ul style="list-style-type: none"> <li>Household Smoking and TV/Video Viewing questions were asked and information recorded correctly</li> </ul>		
<b>PG / BF / PP</b>			
	<ul style="list-style-type: none"> <li>Education and vitamin questions were asked and information recorded correctly</li> </ul>		
	<ul style="list-style-type: none"> <li>Diabetes and hypertension questions asked and answers recorded</li> </ul>		
	<ul style="list-style-type: none"> <li>Pregnancy and/or Delivery information was asked and information recorded correctly</li> </ul>		
	<ul style="list-style-type: none"> <li>ATOD questions were asked and information recorded correctly</li> </ul>		
<b>Risks</b>			
	<ul style="list-style-type: none"> <li>All risks were identified</li> </ul>		
	<ul style="list-style-type: none"> <li>Documented notes for risks with multiple definitions</li> </ul>		
	<ul style="list-style-type: none"> <li>Nutrition Assessment Questionnaire used to individualize the nutrition assessment and identify risks</li> </ul>		
	<ul style="list-style-type: none"> <li>Referred to Nutrition Risk Factors Manual when unsure of risk</li> </ul>		
	<ul style="list-style-type: none"> <li>Documented in Notes non-risk related pertinent information</li> </ul>		
	<ul style="list-style-type: none"> <li>Used critical thinking skills to ask follow-up questions and assess information provided</li> </ul>		
	<ul style="list-style-type: none"> <li>Questions were non-leading and an effective balance of open-ended and closed-ended questions was used.</li> </ul>		
<b>Referrals</b>			
	<ul style="list-style-type: none"> <li>All mandatory referrals were made, if appropriate</li> </ul>		
	<ul style="list-style-type: none"> <li>Service/Program documented correctly (Has, Referred, Applied or Not Applicable)</li> </ul>		
	<ul style="list-style-type: none"> <li>Non-mandatory referrals were made and documented</li> </ul>		
	<ul style="list-style-type: none"> <li>All referrals needed were made and documented</li> </ul>		
	<ul style="list-style-type: none"> <li>Follow-up done for referrals made at cert, if applicable</li> </ul>		
<b>Immunizations (Required up to 2 years old)</b>			
	<ul style="list-style-type: none"> <li>Determined immunization status correctly</li> </ul>		
	<ul style="list-style-type: none"> <li>Documented immunization status correctly</li> </ul>		
	<ul style="list-style-type: none"> <li>Provided an immunization schedule if not up-to-date or record not provided</li> </ul>		
<b>Basic Contact (Certifications &amp; as applicable)</b>			
	<ul style="list-style-type: none"> <li>Caregiver read the Rights and Responsibilities (R&amp;R) and staff reviewed/discussed the highlighted parts <b>OR</b></li> <li>Staff read the entire R&amp;R to the caregiver and reviewed/discussed the highlighted parts</li> </ul>		
	<ul style="list-style-type: none"> <li>R&amp;R signed by caregiver</li> </ul>		
	<ul style="list-style-type: none"> <li>Staff informed client of the programs that WIC shares information with</li> </ul>		
	<ul style="list-style-type: none"> <li>Voter registration was offered/discussed</li> </ul>		
	<ul style="list-style-type: none"> <li>Substance Abuse education provided (only required at new certifications)</li> </ul>		
<b>Food Package Assignment</b>			

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	<ul style="list-style-type: none"> <li>Assigned appropriate food package</li> </ul>		
	<ul style="list-style-type: none"> <li>Tailored food package appropriately (including formula amounts)</li> </ul>		
<b>Flowsheet</b>			
	<ul style="list-style-type: none"> <li>Flow sheet correctly completed</li> </ul>		
<b>Appointment</b>			
	<ul style="list-style-type: none"> <li>Appropriate appointment given to client</li> </ul>		
	<ul style="list-style-type: none"> <li>Documented or printed what client needed to bring at next appointment</li> </ul>		
	<ul style="list-style-type: none"> <li>Client was given an appointment card or appointment notice</li> </ul>		
	<ul style="list-style-type: none"> <li>High risk clients were referred to RD</li> </ul>		
	<ul style="list-style-type: none"> <li>Client's eligibility for tri-monthly or bi-monthly issuance verified before issuing benefits</li> </ul>		
<b>Food Package/eWIC Education</b>			
<b>New Certifications</b>			
	<ul style="list-style-type: none"> <li>WIC foods</li> </ul>		
	<ul style="list-style-type: none"> <li>WIC vendors</li> </ul>		
	<ul style="list-style-type: none"> <li>How to use the eWIC card</li> </ul>		
	<ul style="list-style-type: none"> <li>Can pay for non-WIC items or \$ for fruits and vegetables with SNAP benefits or other forms of payment</li> </ul>		
	<ul style="list-style-type: none"> <li>First/End Use Dates</li> </ul>		
	<ul style="list-style-type: none"> <li>Where to find benefit balance</li> </ul>		
	<ul style="list-style-type: none"> <li>How to read benefits inquiry, mid-transaction report, and receipt</li> </ul>		
	<ul style="list-style-type: none"> <li>What to do if the client needs to change their PIN or they need a new card</li> </ul>		
	<ul style="list-style-type: none"> <li>Inform clinic if there are any problems with store</li> </ul>		
	<ul style="list-style-type: none"> <li>No exchanges for cash, non-authorized food item, or credit</li> </ul>		
	<ul style="list-style-type: none"> <li>Client was given the opportunity to ask questions</li> </ul>		
<b>Follow-up/Recertifications</b>			
	<ul style="list-style-type: none"> <li>Asked if client needs a WIC food list</li> </ul>		
	<ul style="list-style-type: none"> <li>Asked if client needs a WIC vendor list</li> </ul>		
	<ul style="list-style-type: none"> <li>Asked if client has any questions/problems using the eWIC card</li> </ul>		
	<ul style="list-style-type: none"> <li>Recorded any reported problems or complaints and obtained adequate information</li> </ul>		
<b>Card Issuance &amp; Reissuance</b>			
	<ul style="list-style-type: none"> <li>Client signed for card</li> </ul>		
	<ul style="list-style-type: none"> <li>Client signed the R&amp;R</li> <li>Staff reviewed the bullet points on protecting the card and not selling or exchanging it</li> </ul>		
<b>Civil Rights</b>			
	<ul style="list-style-type: none"> <li>Staff provided services in a non-discriminatory manner</li> </ul>		