

## Steps for Certification

- I. Required items must be completed at each certification. (A *midcertification health assessment* is a follow-up appointment and is not a certification appointment.) Participant Data must be recorded in the VISION system. The following is required for all families and/or participants. Other data may be required if applicable.
  - a. Demographic:
    - i. First name, last name
    - ii. Sex
    - iii. Date of birth
    - iv. Participant category
    - v. Ethnicity (Hispanic/Latino or Not Hispanic/Latino)
    - vi. Race (one or more)
    - vii. Mother (name of mother or mother not on WIC)
    - viii. Preferred spoken language
    - ix. Printouts language
    - x. Mother's education level
    - xi. Proof of identity
    - xii. Physical presence at appointment
    - xiii. Phone number(s).
      1. Primary phone number, if any, is required.
      2. When a phone number is entered, staff must mark whether it is a land line or cell/mobile.
      3. Check boxes should be marked to allow texts and calls unless otherwise specified by the client.
      4. Verify phone number(s) for accuracy at each subsequent appointment to ensure appointment reminder messages can be received.
    - xiv. E-mail address (This is needed to register for the participant portal, but is not required for certification. If declined or not available, leave blank.)
    - xv. Physical address
    - xvi. Proof of address (residency)
    - xvii. Household size
    - xviii. Proof of income (source, proof, amount, period) *or* Proof of adjunct eligibility
    - xix. Voter registration (voter registration form offered if not registered to vote at current address)

- b. Health:
    - i. Anthropometrics
    - ii. Bloodwork
    - iii. Nutrition Interview
    - iv. Risk
  - c. File menu:
    - i. An electronic signature must be captured for the Rights and Responsibilities form (R&R).
  - d. Education and Care:
    - i. Nutrition education
    - ii. Care plan
      - 1. Core contact (required at initial certification) and any referrals must be documented in the computer system. WIC program explanation to participants will be provided according to the VENA approach.
  - e. Foods:
    - i. Food package (not required to certify but required in order to issue benefits)
- II. The following items **may** be required for certification:
- a. Verification of Certification (VOC).
    - i. Accepted from transfers who are currently certified by another WIC agency to prove income and nutrition risk factor eligibility (see Transfers).
  - b. Complete Formula and Food Authorization form (FAFAF) signed by a prescriptive authority.
    - i. Required for participants receiving non-contract formula, exempt formula, or any other medical product ordered through the state office.
  - c. Health Data Referral form.
    - i. Required for medical data obtained by the applicant's medical provider if used for certification.
  - d. High risk care plan for high-risk participants.

- i. Assessment and Plan portion of SOAP note must be documented in the VISION care plan at the time of certification.
  - e. Immunizations Release.
    - i. Required for all clients agreeing to share their child's immunizations records.
    - ii. The signature for this release is captured within the Family Referral panel.
  - f. Proof of guardianship/caretaker.
    - i. Required for all non-parent applicants applying for benefits for an infant or child.
- III. Records and proofs entered in VISION for certification are valid for limited periods of time. Records can be entered prior to the certification appointment within the timeframes listed below. It is not required to input new records within these time periods if a new certification needs to be completed. VISION system parameters enforce these time periods and require new records to be entered beyond the expiration dates.
  - a. Identity, residency, income, adjunct eligibility, voter registration and nutrition risk records are valid for 31 days.
  - b. Anthropometric records are valid for 60 days if there is not a category change.
  - c. Bloodwork is valid for 90 days if there is not a category change.
- IV. To prevent system errors and ensure WIC cards will function properly, it is extremely important that WIC staff save the records they entered into VISION and exit the family before another staff person opens the family and adds or edits any records. Two staff should not have the same family open in VISION at the same time.