

NC WIC Program Agency Monitoring Tool

Appendix 1: Client Observation

Client Observation: Observe 3 – 5 individuals as they move through the process of applying for WIC and/or being certified or recertified and of receiving program benefits. Observe at least one woman, one infant, and one child, if possible. If different clients are observed for different activities, then note new client identifier number.

Agency and Site Reviewed: _____

Date: _____ **Reviewers:** _____

	1	2	3	4	5
1. Client Identifier Number					
2. Date of birth					
3. Date of certification being reviewed					
4. Client is physically present					
5. Ethnicity & race data explained & collected (initial application only)					
6. Proof of ID viewed & documented					
7. Proof of residence viewed & documented					
8. Income eligibility determined					
▪ Proof of income/adjunct income eligibility viewed and documented					
▪ Income eligibility determined correctly and "ineligible at certification" notice issued if over income.					
▪ Signed/dated by staff					
9. Rights & responsibilities reviewed by/ read to client and signed/dated by client					
10. Proxy offered					
11. Plans to move asked about & VOC card issued if out-of-state move or a migrant					
12. Food instruments & cash-value vouchers issued					
▪ proof of identity documented					
▪ issued correct food package					
▪ client/proxy signs receipts					
▪ explanation provided of how to use food instruments & cash-value vouchers					
13. Anthropometric measurements done according to recommended technique					
▪ Scales zeroed prior to obtaining weight					
▪ Infants weighed in dry diapers					
▪ Children and women weighed in light clothing & w/out shoes					
▪ Heights measured w/out shoes					
14. Nutrition assessment completed					
▪ Anthropometric / Biochemical / Clinical / Diet & Physical Activity / Eco-social					
▪ Summary of nutrition status					
▪ All eligible nutrition risk codes identified and used correctly					
15. Plan of nutrition care developed					
▪ Client action steps reflect client input					
▪ Appropriate and accurate nutrition education and breastfeeding support provided					
▪ Appropriate client referrals made					
▪ Food package assigned					
▪ Plans for follow-up noted					