

Guidance for Completing the WIC Program Digital Monitoring Tool

Objective: Guidance to support staff utilizing the WIC Program Digital Monitoring Tool to document a monitoring review.

To use the digital tool, download the document and save to your device. From that saved document, fill-out the information at the top of the WIC Program Monitoring Tool (Part 1 or Part 2):

Internet Explorer does not allow download of the digital tool. If available, recommend using Mozilla Firefox to complete the document.

Local Agency:	
Date of Review:	
Review Team:	
Site(s) Reviewed:	

You will notice that the format of the Area of Review digital monitoring tool is identical to that of a printed monitoring tool. Within the “Reviewer’s Notes” column, one is free to type notes. Document in the review notes of the review areas as needed.

Note: The working documents and report of findings from a Local Agency WIC Program Monitoring are public information. For this reason, applicant and participant identifying information must not be documented in the working papers nor cited in verbal or written reports of findings.

The “Status” column presents drop-down options that are indicated in the legend on the bottom of the monitoring tool pages. These status options include:

- N/A=Not applicable
- 3=Meets minimum standards; Satisfactory
- 2=Meets minimum standards most of the time; needs improvement; Suggestion
- 1=Does not meet minimum standards; Finding

Once a conclusion is made about a review area, select the appropriate status from the drop-down list.

Status**
<input type="text"/>
N/A 3=Meets minin 2=Meets minin 1=Does not m

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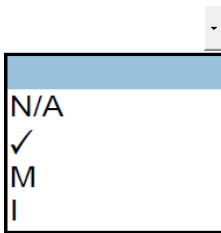
Part I: Administrative Services Review

Table 1.1

1. Enter the participant's family ID. (The font size decreases as necessary based on the information entered into the field).
2. Under WIC Category, select the appropriate participant category from the drop-down list:

2. WIC Category	
3. Date created (family demographics screen)	
4. Days past processing standards	
5. Reason appointment is outside of processing standards	Pregnant
6. Scheduled appointment date / or walk-in policy	Postpartum
7. Documentation of F/U for missed appointments	Breastfeeding
▪ Required for all categories	Infant
	Child

3. For reasons outside of processing standards and documentation of F/U for missed appointments, select the appropriate code from the drop-down list:

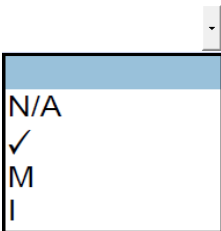


Code for Table: N/A= Not Applicable ✓=Present M=Missing I=Incomplete

Table 4.2

1. Enter the vendor name/number and select the appropriate code from the drop-down list.

Code for Table: N/A=Not Applicable ✓=Present M=Missing I=Incomplete



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Part II: Nutrition Services Review

After the agency, site reviewed, date and reviewer's information are filled-in on one Appendix of the Monitoring Tool, the information is automatically transferred to all six appendices.

For Appendices 1, 2, and 3, enter the participant's family ID, date of birth, and date of certification.

- The date of birth and date of certification can be entered manually OR using the calendar when pressing the drop-down arrow.

Date of Birth:

Family ID																																																		
1. Date of birth																																																		
2. Date of certification being reviewed	<div style="border: 1px solid black; padding: 2px;"> September 2021 <table style="font-size: 8px; border-collapse: collapse; width: 100%;"> <tr> <th>Sun</th><th>Mon</th><th>Tue</th><th>Wed</th><th>Thu</th><th>Fri</th><th>Sat</th> </tr> <tr> <td>29</td><td>30</td><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td> </tr> <tr> <td>5</td><td>6</td><td>7</td><td style="border: 1px solid blue;">8</td><td>9</td><td>10</td><td>11</td> </tr> <tr> <td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td> </tr> <tr> <td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td> </tr> <tr> <td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>1</td><td>2</td> </tr> <tr> <td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td> </tr> </table> Today: 9/8/2021 </div>	Sun	Mon	Tue	Wed	Thu	Fri	Sat	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	1	2	3	4	5	6	7	8	9
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3. Client is physically present																																																		
4. Ethnicity & race data explained or collected (initial application only)																																																		
5. Proof of ID viewed & documented																																																		

- Select the appropriate code from the drop-down list for items 3-15:

Code for Table: N/A=Not Applicable ✓=Present M=Missing I=Incomplete

▼

N/A
✓
M
I

Appendices 2 and 3

1. Follow the same guidance as above when completing the appendices. Since there may be more than one potential response when selecting M or I, it is recommended that one types the number beside the code, then utilize the second page available for notes to document as needed.

See example below:

Physically present	
Anthropometric	
<ul style="list-style-type: none"> ▪ Prenatal: pre-pregnancy BMI, weight & height, prenatal weight gain chart 	M1
<ul style="list-style-type: none"> ▪ Postpartum: pre-pregnancy BMI, weight & height, total wt. gain in pregnancy 	N/A
Biochemical (hgb/hct)	✓
Clinical/Health History/Disease Status	M
Eco social	I

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2. For nutrition risk criteria, enter the codes manually.

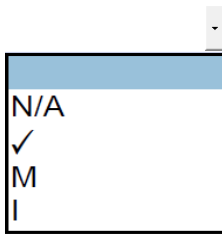
- The font size decreases as necessary based on the information entered into the field.

Appendix 4

1. Enter the participant's family ID. Follow the same guidance as above when entering participant's state inventory number and date of pump issuance being reviewed.

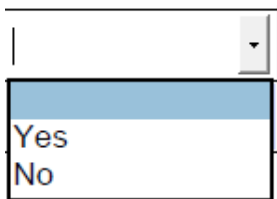
2. For the completed loan agreement/release of liability, documentation of issuance in record, documentation of initial 72-hour follow-up and pump cleaned within one business day of last return, press the drop-down arrow and select the appropriate code:

Code for Table: N/A=Not Applicable ✓=Present M=Missing I=Incomplete



A screenshot of a drop-down menu. The menu is open, showing four options: "N/A", "✓", "M", and "I". The "N/A" option is highlighted with a blue background. The menu is contained within a rectangular box with a small downward-pointing arrow on the right side.

For participant eligible for breast pump, press the drop-down arrow and press yes or no.



A screenshot of a drop-down menu. The menu is open, showing two options: "Yes" and "No". The "Yes" option is highlighted with a blue background. The menu is contained within a rectangular box with a small downward-pointing arrow on the right side.

Appendix 5

Enter the participant's family ID. Follow the same guidance as above when entering participant's BFPC program enrollment, prenatal and post-delivery contact information.

Appendix 6

Follow the same guidance as above for entering data.

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Record Retention and Disposition of Electronic Documents

The Local Agency must retain on file monitoring documents (see Chapter 15 of the WIC Program Manual) in accordance with DHHS Office of the Controller as outlined in Chapter 13 of the WIC Program Manual. After the local agency has completed a Local Agency Self-assessment (LASA) review, file all monitoring documents in a secure and retrievable location in the local agency.

If supporting documentation is requested from the NSB, a digital format can be shared in a confidential and secure manner such as utilizing encrypted email. If the local agency does not have the ability to email the documentation in a confidential and secure manner, please contact your RNC for guidance.