

AN INTRODUCTION TO THE NYS WIC PROGRAM

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WHAT IS WIC?

WIC is a federal supplemental food program that provides low-income families with healthy foods and nutrition education. While nearly everyone refers to it as WIC, the program's official title is actually the Special Supplemental Nutrition Program for **W**omen, **I**nfants, and **C**hildren. Although WIC is funded by the federal government, every state in the country is in charge of running its own program.

The New York State WIC Program has many partners in the community and has worked to develop relationships with a variety of other social service programs (e.g., Supplemental Nutrition Assistance Program (SNAP), Head Start, Medicaid, etc.) The strong referral network that exists between WIC and other programs improves the quality of participants' lives and helps them achieve healthier lifestyles.

WIC'S MISSION

WIC's mission is to improve the nutrition and health status of low-income women, infants, and children and reduce and prevent obesity by providing supplemental nutritious foods, participant-centered nutrition/health education, and referrals to health care and other services. WIC's goals are to:

- Improve pregnancy outcomes
- Reduce the number of low birth weight infants
- Support and encourage breastfeeding
- Support the growth and development of infants and children

WIC FOODS



The WIC program follows specific criteria when determining acceptable brands and quantities for each type of food (i.e., USDA defined nutrient guidelines). The NYS WIC program also considers other factors, such as geographic availability, cost, and participant preference.

WIC food packages have always been based on nutritional research and Dietary Guidelines for Americans. Historically, this information identified deficiencies in protein, iron, calcium, and vitamins A, D, and C among low-income women, infants, and children. When the WIC program reexamined these food packages, research indicated that the nutritional needs and lifestyles of the WIC population had changed. WIC food packages are now based on research that aims to reduce the prevalence of diabetes, obesity, and heart disease. The broader availability of foods has also made it possible to incorporate culturally appropriate foods and fruits/vegetables.

Don't forget...the WIC program is intended to supplement the diet - WIC does NOT provide all the foods that participants need to meet their daily requirements. In addition, each food package is prescribed for the **individual** and is intended to be consumed over a 30-day period. Participants can use WIC checks at authorized stores and pharmacies to purchase WIC food items, including:

- milk
- cheese
- eggs
- 100% juice
- cereal
- peanut butter
- dried peas/beans
- canned beans
- whole grain bread
- whole grain tortillas
- brown rice
- infant formula
- infant cereal
- soy beverages
- tofu products
- fruits and vegetables
- baby food meats
- baby food vegetables and fruits



Participants are provided with Acceptable Foods Card documents to help them determine which types, brands, and container sizes of food can (and cannot) be purchased with their WIC checks. Make sure these documents are current and make sure your participants know they can only purchase the foods items that are listed on these documents.

BREASTFEEDING

The WIC Program recognizes breastfeeding as the normal method for feeding infants. It is considered the preferred method for feeding infants unless contraindicated for health reasons. WIC supports and encourages women who fully breastfeed (no formula supplementation) by providing them with more food and a longer certification period. All breastfeeding moms can take advantage of WIC's Breastfeeding Peer Counselors.

For infants who are formula fed, the WIC program offers powder, concentrate, and, in special circumstances, Ready-to-use (RTU) forms. For more information about formulas or nutritional supplements, you can refer to the Monthly Maximums of NYS Approved Formulas document (available on the desktop of your computer).

NUTRITION EDUCATION

In addition to healthy foods, WIC participants also receive information about how lifestyle behaviors affect health. Nutrition staff counsel participants – individually or in facilitated groups – on a variety of topics (e.g., eating habits, parenting skills, etc.) and participants learn how to incorporate healthy foods and behaviors into their daily lives.

Each participant (or certifying parent/guardian) is offered nutrition education several times throughout his/her certification period. They are encouraged to take individual actions that will promote a healthier lifestyle, such as choosing low fat milk, eating more fruits and vegetables, or increasing physical activity. The knowledge that participants gain from nutrition education often leads to improved pregnancy outcomes, improved childhood development, and better overall health.



CERTIFICATION

When someone is interested in applying for WIC benefits, they must contact a WIC local agency and schedule a certification appointment. During the certification process, at least two staff members must be involved in the assessment process to determine if the applicant meets all four of WIC's eligibility criteria (*see the next page*). Make sure applicants know who and what they need to bring to the certification appointment, including:

All WIC applicants*
Proof of category
Proof of identity

Proof of New York State residency
Proof of income
Medical/health information

***With few exceptions, WIC applicants must be physically present for certification appointments**

ELIGIBILITY CRITERIA

To qualify for the NYS WIC program and receive benefits, applicants must show proof of WIC's four eligibility criteria:

Category

The applicant must be a(n):

- pregnant woman
 - breastfeeding woman (up to 12 months postpartum)
 - postpartum woman (up to six months postpartum)
 - infant
 - child (under five)
-

Residency

Although the applicant must live in New York state, he/she does not have to be a U.S. Citizen.

Income

The applicant must show:

Participation in an adjunct program (Medicaid, Food Stamps (SNAP), TANF, Head Start, Early Head Start, Free or Reduced Price School Meals Program)

OR

That his/her gross household income is at or below 185% of the federal poverty level, providing current proof of **all** income sources for **all** household members.

Nutritional Risk

Each applicant will be assessed for nutritional risks such as anemia, dietary related factors, medical conditions, low birth weight, etc.

WICSIS

Although face-to-face communication is a very important part of the WIC clinic, you will probably also be using a computer on a daily basis. New York State currently uses the Women, Infants, and Children Statewide Information System (WICSIS) to record and manage participant information and eligibility data. WICSIS is also used to certify participants and distribute benefits.

CERTIFICATION PERIODS

The information that you enter in WICSIS determines a participant's category type. WICSIS is programmed to automatically calculate the certification period for each participant based on his/her category. The length of time that a participant receives benefits is called the **certification period**. At the end of each certification period, individuals must repeat the eligibility determination process in order to continue to receive benefits. Certification periods may be extended or shortened by a period of up to 30 days if there are scheduling difficulties.

Category	Certification Period
Prenatal women	The duration of her pregnancy through six weeks postpartum.
Breastfeeding women	Until her infant reaches his/her first birthday <u>or</u> she stops breastfeeding* - whichever occurs first. A woman who stops breastfeeding before she is six months postpartum is eligible for the program as a postpartum woman.
Postpartum women	Up to six months after her date of delivery.
Infants	Until the infant reaches his/her first birthday. If the infant is more than six months old when he/she certifies, he/she will not have to subsequently certify for six months (e.g., an infant who initially certifies at 9 months will not have to subsequently certify until 15 months).
Children	Six month intervals until the child's fifth birthday.

*A breastfeeding woman who requests more than 50% of the formula maximum will remain an active participant until her infant's first birthday. Although she will not receive a food package after six months postpartum, she will continue to benefit from services such as peer counselors, breast pumps, and nutrition education.

PARTICIPANT ORIENTATION

When new participants join the NYS WIC program, local agencies are responsible for making sure they know all of the “basic” WIC information – how to use WIC checks, common WIC terminology, office hours, etc. While all WIC employees should have a strong grasp on this information, it is especially important that you familiarize yourself with this information if participant orientation is or will be one of your job responsibilities.

PROXIES AND REPRESENTATIVES

The WIC Program allows participants or enrolling parents/guardians to authorize others to act on their behalf and “stand in” for them and attend nutrition education appointments, sign for WIC checks, and use WIC checks to purchase food. Under some circumstances, these individuals may also certify participants. Participants (or parents/guardians) must complete an Authorization Form for every proxy and/or representative, so make sure they know how to fill it out correctly.

WIC CHECKS

Customer service plays a big role in the WIC clinic. WIC checks are one area where customer service plays a very important role – you should always make sure participants know how to use their WIC checks **before** they leave your clinic.

This section lists the foods (including quantities) that **must** be purchased with this check. WIC checks cannot be redeemed unless **ALL** of the foods that are listed here are purchased.

Every WIC participant is provided with his/her own set of checks. This area displays the participant’s name and WIC ID number, as well as the name of his/her WIC clinic.

This area shows when this check can be cashed in stores - the **Not Good Before** date is the first day and the **Not Good After** date is the last day. Each check is “good” for 30 days.

The person who is redeeming the check must sign here in front of the cashier after the cashier enters the correct dollar amount in the **Pay Exactly** box.

The cashier must enter the combined total for all of the foods here in the **Pay Exactly** field. This amount must be less than or equal to the **Not to Exceed** amount.

WIC ID CARDS


The WIC Program Identification Card – commonly referred to as the WIC ID card – contributes to a positive shopping experience for your participants and their proxies/representatives. First and foremost, it standardizes the identification process. It is the only proof of ID that participants, proxies, and representatives need to show when they redeem WIC checks.

Every WIC applicant must show proof of identity, residency, and income during the certification process before getting a WIC ID Card. As mentioned earlier, participants must also fill out an Authorization Form before they can add (or change) proxies and representatives. The work that you put into these initial screening processes makes life a lot easier when participants pick up their checks during a Nutrition Education appointment. Signatures on both the WIC ID Card and Authorization Form provide a fast and easy way to verify a person’s identity in the clinic. As mentioned earlier, the WIC ID Card also saves time in stores. Instead of asking for ID, all the cashier has to do is compare the signature on the WIC check(s) with the signature on the WIC ID Card.

When you issue a WIC ID Card through WICSIS, it will remain valid until changes are made to participants (e.g., certifications ending, being added to household, being moved out of household), the primary caretaker, or proxy information. When any of this information changes, you must obtain an updated Authorization Form, update WICSIS, and print a new WIC ID Card.

The left side of the WIC ID Card displays contact information for your local agency and the names/ID numbers of the participant(s) for whom checks will be redeemed. The name that is printed on the WIC check **must** match what is printed in this area.

The right side of the WIC ID Card displays the names and signatures of the primary caretaker and any proxies and/or representatives. The cashier will use these signatures to verify identify when checks are redeemed.

	Training LA 123 Main St Albany, NY 12204	WIC PROGRAM IDENTIFICATION CARD NYS DEPARTMENT OF HEALTH	
	Phone Number: (518)465-0682 Local Agency No: 1 Site No: 1	Card Number: 22600207 Date Issued: 11/10/2000	GRAY, ANNA Participant/Parent/Guardian Name
WIC ID: #22601180	Name: GRAY, DORIAN	<i>Anna Gray</i> Participant/Parent/Guardian Signature	
		WINDSOR, ELIZABETH NO PROXY Parent/Caretaker/Proxy Name	
		<i>Elizabeth Windsor</i> X X X X X Proxy Signature	
		<i>Deborah Shaffer</i> Local Agency Authorized Signature	

When you issue and print WIC ID cards from WICSIS, you must sign them here.

ACCESSING WICSIS

Before you can access WICSIS, your coordinator must request two user IDs for you from the State – one for the Local Area Network (LAN) and one for WICSIS. Your user ID is your “signature” in WICSIS – it is linked to every action that you make.

When you are first assigned your user IDs, you will also be given initial passwords. You must immediately change these passwords to something that is easy for you to remember, but hard for others to guess. Don’t select something obvious and do not share your password(s) with anyone else – not even your coordinator! These days, we have a lot of user IDs and passwords to remember (e.g., online bank accounts, personal email accounts, etc.) It may be easier for you to remember your WIC login information if you use the same password for the LAN and WICSIS.

You must change your password every 60 days. You’ll know when it is time to change it because the system will begin to prompt you several days before it expires. The best practice is to change your LAN password at a permanent site. If you create a new password when you are at a temporary site, you will not be able to log on at your permanent site until the temporary server is checked in.

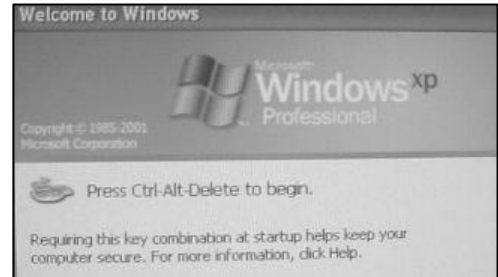
LAN passwords **must** be **at least** eight characters long and contain **at least** three of the following four character types:

Uppercase Letters A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
Lowercase Letters a b c d e f g h i j k l m n o p q r s t u v w x y z
Numbers 0 1 2 3 4 5 6 7 8 9
Special Characters (including spaces between letters/numbers) ! @ # \$ % . ^ & * < >

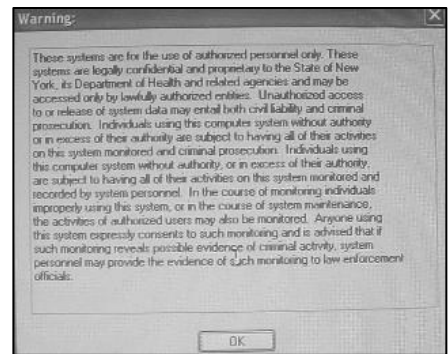
LOGGING ON

The LAN password is case sensitive. Before entering your user ID, make sure that the CAPS Lock feature is turned off. You are allowed three attempts to log onto the LAN. If you aren't successful after the third try, the system will not allow you to try again – you will have to contact the Help Desk or your coordinator to unlock your user ID.

The Welcome to Windows screen is the first window you'll see. Press Ctrl + Alt + Delete to begin the process of logging onto the LAN.



The Warning screen informs you that you must be an authorized user and outlines the penalties for unauthorized use. Click the OK button to proceed.



When the Log On to Windows screen appears, enter your user ID in the User Name field, your password in the Password field, and select NYWICSIS from the Log On To menu. Click on the OK button to log on.

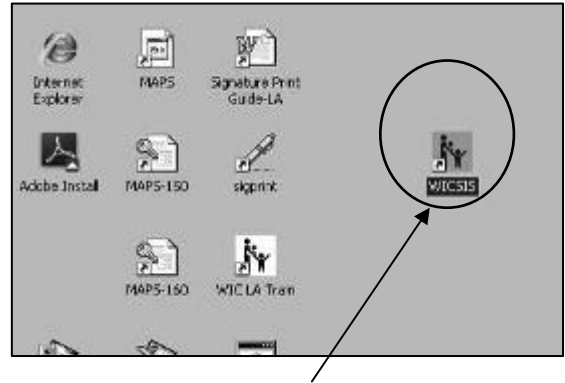


After logging onto the LAN, the NYWICSIS Logon Script will appear. If you do not see the Logon Script, you will need to call the Help Desk. The script includes:

- **Local Agency name**
- **Server name**
- **Date and time**
- **Number of days until your LAN password expires**

Clicking the OK button will bring you to the Windows Desktop.

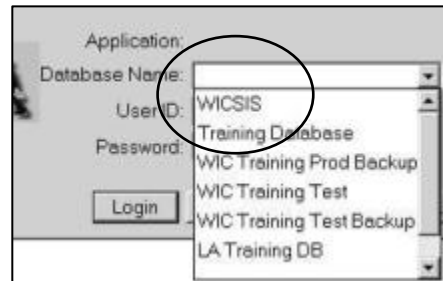
Double click the WICSIS icon. Make sure you select the correct icon!



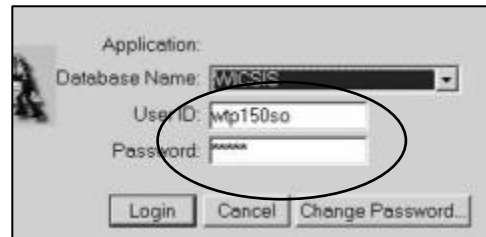
When the NYWICSIS Login window appears, make sure you see the correct Application Version number. If you aren't sure which version you should have, ask your coordinator. Call the Help Desk if this number is incorrect.



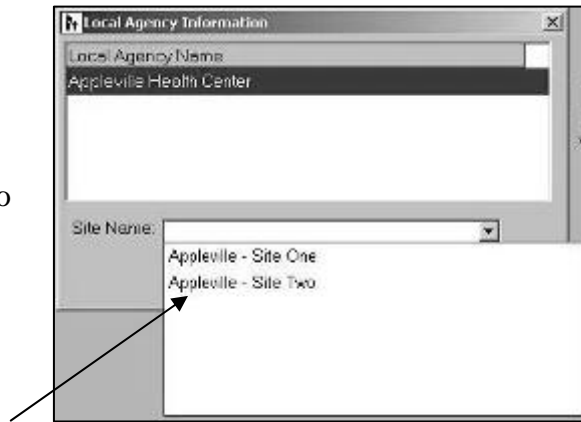
Select the correct name from the dropdown Database Name menu. Your selection here determines where your data is drawn from. Choose WICSIS when you are at a permanent site and Site when you are at a temporary site.



Enter your WICSIS user ID in the User ID field and your WICSIS password in the Password field. Click the Login button.



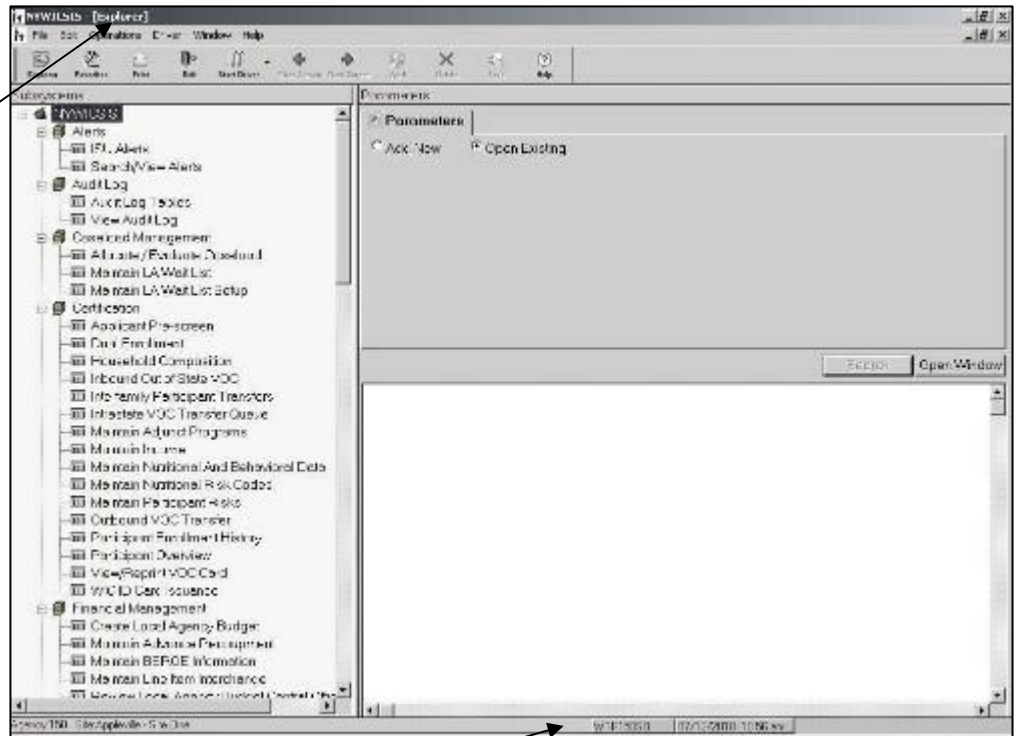
The Local Agency Information window will open. Make sure you select the correct name from the dropdown Site Name menu – you will only be able to view participant records from that site. Click the OK button to complete the login process.



EXPLORER WINDOW

The Explorer window will be the first window that you see in WICSIS. It is the starting point for all WICSIS activities. The Explorer window is divided into two sections: Subsystems (on the left) and Parameters (on the right). The list that displays under Subsystems is based on the user's security access.

Every window in WICSIS has a header that displays the name of the window.



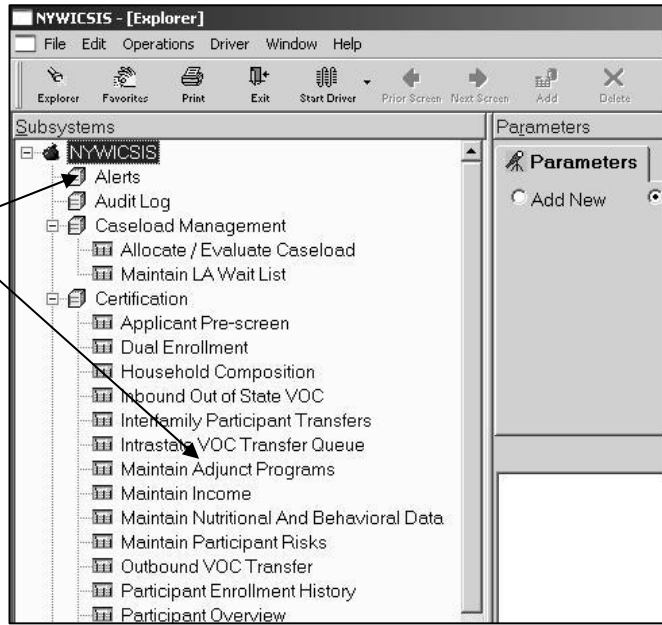
The footer at the bottom of the Explorer window includes your Local Agency Number, Site Name and Number, User ID, and the date and time.

SUBSYSTEMS

The Subsystems section lists all of the major components of WICSIS, along with their function-specific windows. Subsystems can be easily identified by their yellow file cabinet icons, while windows are represented by blue folder icons. Based on your job responsibilities, your coordinator or director will assign one or more security templates. As mentioned earlier, your security template(s) will determine which windows you see within each subsystem.

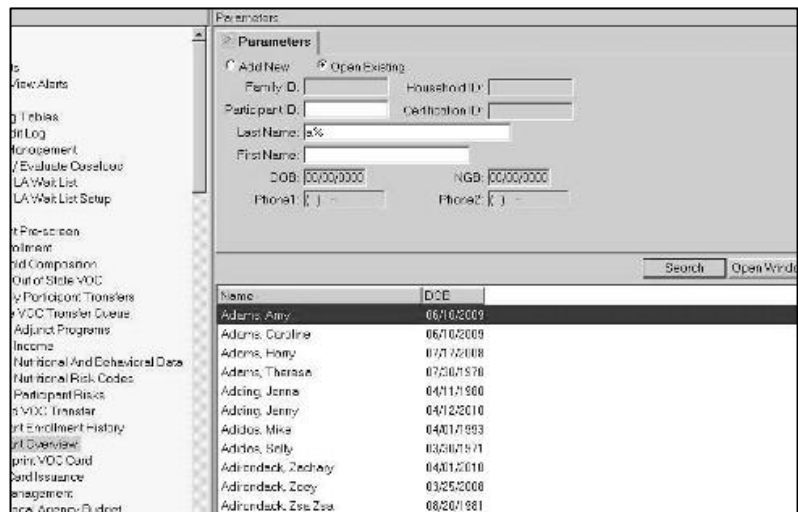
In this image, the user can see the Alerts subsystem, but not any of the windows within it. This is because she does not have the security access to view the windows that pertain to the Alerts subsystem.

However, she does have access to all of the windows used to determine program eligibility – which are found within the Certification subsystem.



PARAMETERS

The Parameters section is used to “define” searches in WICSIS. This view will change based on which window you select in the Subsystems section. Enter information into one or more fields and click the Search button. Search results will be listed directly below in alphabetical order. Highlight a name in the results area and click the Open Window button to access the requested information.



CHANGING YOUR WICSIS PASSWORD

Although you are required to change your WICSIS password when it expires, you have the option of changing it anytime. As with LAN passwords, the best practice is to only change your WICSIS password at a permanent site. Because the NYS WIC program **strongly** recommends that you use the same password for the LAN and WICSIS, the best practice is to use the same password for both – when you change one, change the other.

To change your WICSIS password, click the Change Password button on the NYWICSIS Login window. The Change Password window will open. Enter your old password in the Old Password field and then enter your new password in both the New Password and Confirm New Password fields. Click the OK button.



You will know that your password was changed successfully when you see a pop-up confirmation message. Click the OK button.



DATABASE SEARCHES

Database searches and interviewing skills are your best tools for making sure that each participant or household member is served using the same record for the entire duration of his/her participation in the NYS WIC program. Dual Enrollment and Participant Overview searches should be the first things you do whenever a person contacts your local agency. Dual Enrollment search results will let you know if the person has an active certification anywhere in NYS, while Participant Overview search results will let you know if he/she has a record in your local agency's database. If you do find a record, you should use and update it appropriately (e.g., initiate a transfer, update the record in the Household Composition window). If you get a Dual Enrollment "hit", you **MUST** use that record – active certifications trump everything else in the WIC program!

Once a record is created in WICSIS, it will remain in the system for *at least* 7-10 years. To date, participant and household member records have yet to be purged from WICSIS. If a new person (i.e. newborn infant) needs to be added to an existing household, you will have to search for his/her household members. Make sure you search for all of them, as last names may differ among household members. Don't forget to update the Authorization Form!

Search Results – Did you find them?

Related Action(s)

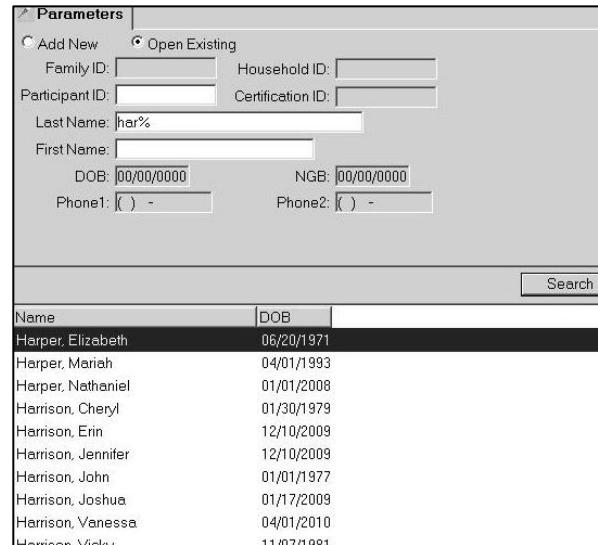
<p>Dual Enrollment – Yes (at your local agency) Participant Overview - Yes <i>Current participant of your program who has an existing record in your database.</i></p>	<p>Make updates to the already existing record using various WICSIS windows (e.g., Household Composition, Interfamily Participant Transfers, etc.)</p>
<p>Dual Enrollment – Yes (at another local agency) Participant Overview – No <i>Current participant of another program who has no existing record in your database.</i></p>	<p>Contact the other local agency to initiate the Verification of Certification (VOC) transfer process.</p>
<p>Dual Enrollment – Yes (at another local agency) Participant Overview – Yes <i>Current participant of another program who has an existing record in your database.</i></p>	<p>Contact the other local agency to initiate the Verification of Certification (VOC) transfer process. Write notes to cross reference the active record with the old record that exists in your database.</p>
<p>Dual Enrollment – No Participant Overview – No <i>No existing record.</i></p>	<p>Create a new household using the Applicant Pre-screen window.</p>

BROAD VS. NARROW

Whenever you search for a participant or household member in WICSIS, you should always make sure that the information you enter is correct. Spelling counts! WICSIS searches for exact matches – if you are off by even one letter or number, you will not find the record you’re looking for. If you’re unsure of how to spell a participant’s name and do not have his/her WIC ID number, it might be a good idea for you to perform a broad, or partial, search. Enter the letters that you do know, followed by the percent (%) sign. WICSIS will search for all names that start those letters.

For example, if Vicky Harrison calls your agency to make a certification appointment and all you catch of her last name is “H, a, r...” you can enter **Har%** in the **Last Name** field of WICSIS and click to Search button to find all of the people whose last names start with the letters h, a, and r. The more information you enter, the faster your searches will be. Using the same example, if you enhanced the search by adding v% in the **First Name** field, you would be able to narrow your results to persons whose first name starts with V and last name starts with Har.

Although rare, it is possible for participants to have the same first and last names. When this happens, you can use the participant’s date of birth or other household information (e.g., address, phone number, etc.) to identify the correct record.



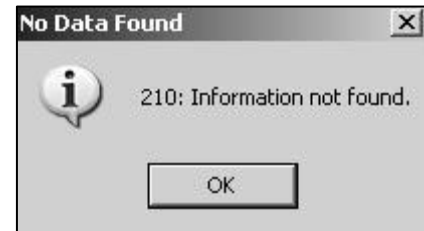
Name	DOB
Harper, Elizabeth	06/20/1971
Harper, Mariah	04/01/1993
Harper, Nathaniel	01/01/2008
Harrison, Cheryl	01/30/1979
Harrison, Erin	12/10/2009
Harrison, Jennifer	12/10/2009
Harrison, John	01/01/1977
Harrison, Joshua	01/17/2009
Harrison, Vanessa	04/01/2010
Harrison, Vicky	11/07/1981

The narrowest search for a participant or household member is his/her WIC ID number. When you search using the ID number, you will get only one result – an exact match.

210: Information not found

There are a number of reasons why you may see this pop-up message appear when you are conducting a search:

- You entered an incorrect Participant ID number
- The name that you entered was misspelled
- The person that you are searching for does not exist in your database



DUAL ENROLLMENT WINDOW

The Dual Enrollment search filters the entire NYS database of active certifications (approximately 500,000 items) for records that match the information you enter in the search parameter fields. If you're unsure of how to spell something, use a broader search. You can narrow Dual Enrollment searches by entering date of birth information, but be mindful – WICSIS searches for exact matches! If another staff person entered a date of birth incorrectly, that participant will not show up in your search results.

Active participants are the only ones who will appear in the search results area of the Dual Enrollment window. You will not see non-WIC household members, removed participants, participants who have expired certifications, or applicants with "Pending" statuses. You should always conduct Participant Overview searches along with Dual Enrollment searches to make sure that there are no existing records in your local agency database.

When you do get a "hit", you should review and discuss that information with the applicant to determine if they are enrolled somewhere else. If they are, the other local agency should be contacted and the Verification of Certification transfer process should be initiated.

The screenshot shows the 'Dual Enrollment' window with the following components and callouts:

- Search Parameters area** – where you enter name and date of birth information. This area includes a 'Name' field with a dropdown menu set to 'Like' and the text 'Cactus Sharon', and a 'Date Of Birth' field with the text '80/00/0000'.
- Find Now button** – initiates the search. This button is located to the right of the search fields.
- New Search button** – clears the search parameter fields and Result area. This button is located below the 'Find Now' and 'Stop' buttons.
- Result area** – displays the results of searches. This area contains a table with the following data:

Name	DOB	Agy ID	Agency Name
Cactus Sharon	08/07/1981	160	160

At the bottom of the window, there are 'Close', 'Cancel', and 'Help' buttons.

LOCKING YOUR COMPUTER

Every time you leave your workstation (e.g., to go to the restroom, to get a chart, to collect checks from the printer, etc.), you should lock your computer. Not only does this prevent others from working in WICSIS under your User ID, it also protects confidential participant and vendor information. Think of it this way - would you ever want a bank teller to leave your account information available for someone else to view?

To lock your computer, you must press Ctrl + Alt + Delete and click the Lock Computer button. Once your computer is locked, only you will be able to unlock it by pressing Ctrl + Alt + Delete and re-entering your LAN password.

If you walk away from your computer and forget to lock it (which we know you won't), whatever was on your screen when you left will be accessible and UNPROTECTED for 15 minutes! Whether you walk away from your computer or just stop using while you talk to the applicant/participant, as a security precaution, the system will automatically log you out of WICSIS and lock your computer after 15 minutes of inactivity. You might want to jiggle your mouse.

LOGGING OFF / SHUTTING DOWN

At the end of every day, you must log off your computer. Log off, not shut down! At night, the state needs to be able to access your computer so that important information can be pushed (e.g., reference tables, new builds, etc.) Don't forget to log out of WICSIS before attempting to log off the LAN. The state does recommend that once a week, you turn off your computer, wait a few seconds, and then turn it right back on. This process will "refresh" your computer and improve its performance. Always turn it right back on...NEVER leave your computer shut down.

For temporary sites, you will also need to shut down your laptop computer before you transport it to the temporary site. When you return to the permanent site make sure your computer is turned back on and connected to the network.

CONFIDENTIALITY

As a WIC staff member, you will be collecting and viewing a large variety of information about applicants and participants. This may include medical forms, income information, Authorization forms, etc. **ALL** of this information is confidential, as is the applicant or participant's presence at your local agency. It is your responsibility to keep it private.

Any information pertaining to an applicant/participant cannot be shared with anyone without the specific written request or approval of the applicant/participant. In addition, some local agencies are bound by the Health Insurance Portability and Accountability Act (HIPAA). Ask your supervisor for more details about your local agency's policy regarding the release of participant information.

Do not leave a participant's paper file, or anything else with his or her name on it, out in the open where others can see it.

- Position your computer so that others cannot see the screen
- Always log off (or lock) your computer before leaving your work station
- Keep all participant information out of sight (e.g., close the paper chart and turn it face down)

Do not talk about participants or applicants in areas where others can hear your conversation.

- Find a private place to discuss participant information
- Never discuss participant information in open areas such as hallways, elevators, waiting rooms, etc.
- Get permission before leaving a message on an answering machine

Do not go into a participant's record for any reason other than to serve the participant or conduct specific WIC business.

- Only use information from participant records for the care of the participant (not for personal reasons)
- Never share your password(s) with anyone

LET'S REVIEW!

1 The best place to change your password is at a _____ .

2 True or false? WIC participants can use WIC checks to purchase anything in the store.

3 Which of the following is not a WIC-type food? (circle one)

milk

white rice

apples

peanut butter

eggs

4 A minimum of _____ local agency staff members have to be involved in every certification.

5 List the four eligibility criteria:

-
-
-
-

6 The letters in WIC stand for _____ , _____ , and _____ .

7 Which resource helps participants figure out which foods they can purchase with WIC checks? (circle one)

WIC ID Card **WIC Help Hotline** **WIC Acceptable Foods Card** **www.wicfoods.org**

8 How do you lock your computer?

9 Why should a Dual Enrollment search be one of the very first things (if not the first) that you do when dealing with a WIC applicant?

1. permanent site 2. False - WIC checks can only be used to buy specific types, brands, and container sizes of food. 3. white rice 4. two 5. category, residency, income, and nutritional risk 6. women, infants, children 7. WIC Acceptable Foods Card 8. Press Ctrl + Alt + Delete and click the Lock Computer button. 9. To make sure the applicant does not have an ACTIVE certification anywhere in New York state.

APPLICANT PRESCREEN WINDOW

The Applicant Prescreen window is used to record basic demographic/eligibility information and create new households in WICSIS. You should **only** open this window if you are **sure** that neither the applicant nor any member of his/her household: has an active record anywhere in NYS (Dual Enrollment search) or record in your local agency database (Participant Overview search). As a minimum, you should try to prescreen all household members who will require certification appointments; ideally, you will prescreen all household members at the same time.

Request Date – lists today’s date. Take note of this date as WIC policy dictates that you schedule certification appointments and access each applicant’s WIC eligibility within specific processing timeframes.

Family Members –displays all of the household members you prescreen.

Name... – click this button to enter or edit the name of the applicant or household member.

Type – use these radio buttons to indicate whether the person is WIC or non-WIC. Certain fields are enabled and/or required for WIC types (e.g., DOB, Sex, Category).

DOB – enter the individual’s date of birth here. WICSIS compares the DOB against other information such as Type and Category to make sure your selections are logical. If they aren’t, you will receive a warning message.

Category – use this dropdown to select the applicant’s WIC category – Prenatal woman, postpartum woman, breastfeeding woman, infant, or child.

Schedule Appointments – click this button to go to the Participant Appointments window and schedule an appointment.

Sex – use this dropdown menu to select the sex of the household member.

Close – click this button to **SAVE** all the information in the window, trigger Dual Enrollment and Participant Overview searches, assign WIC ID numbers to household members, and close the window.

Cancel – click this button to close the window without saving any information.

The screenshot shows the following fields and buttons:

- Request Date: 07/12/2010
- Request Method: Walkin
- Family Members table:

Applicant Name	Category
Suzy Summertime	Pregnant Woman
- Member Data:
 - Name: Suzy Summertime
 - Type: WIC NON-WIC
 - DOB: 04/15/1985
 - Sex: Female
 - Category: Pregnant Woman
 - Adjunct Program: Medicaid
 - Program ID: JK12345K
 - Medicaid Seq#: 01
- Residential Address: Address...
- Mailing Address: Address... Same as Residence
- Family Phone: Phone Number: () - Phone Type:
- Buttons: Add, Delete, Schedule Appointment, Close, Cancel, Save, Help

Applicant Prescreen Window (continued)

Use this window one time **ONLY** for each new household. If you accidentally close the Applicant Prescreen window before you are finished adding household members, do not try to open it again! You can always add the remaining household members via the Household Composition window. Every time you open the Applicant Prescreen window, WICSIS creates a new household, or unique record. If you prescreen the same person twice, you will create a duplicate record.

The screenshot shows the 'CT015N - Applicant Pre-screen' window. At the top, it displays 'Request Date: 07/12/2010' and 'Request Method: Walkin'. Below this is a 'Family Members' table with one entry: 'Suzy Summertime' in the 'Applicant Name' column and 'Pregnant Woman' in the 'Category' column. To the right of the table are fields for 'Residential Address' (123 Fourth St Brooklyn, NY 11238) and 'Mailing Address' (123 Fourth St Brooklyn, NY 11238), each with an 'Address...' button. Below the mailing address is a checked checkbox for 'Same as Residence'. The 'Member Data' section includes 'Suzy Summertime' in the 'Name...' field, 'Type: WIC' selected, 'DOB: 04/15/1985', 'Sex: Female', and 'Category: Pregnant Woman'. The 'Adjunct Program' section shows 'Program: Medicaid' and 'Program ID: JK12345K'. At the bottom, there are buttons for 'Add', 'Delete', 'Schedule Appointment', 'Close', 'Cancel', 'Save', and 'Help'. Callout boxes provide instructions for the 'Request Method' dropdown, the 'Address' buttons, the 'Add' button, the 'Delete' button, the 'Adjunct Programs' section, the 'Same as Residence' checkbox, the 'Phone Number' field, the 'Phone Type' dropdown, and the 'Save' button.

Request Method – use this dropdown menu to select the applicant’s request method – walk in, phone, or mail.

Address – click on these buttons to enter or edit the residential and mailing addresses.

Phone Number – enter the participant’s preferred phone number here.

Phone Type – use this dropdown menu to select the phone type. Please note: selecting Do Not Call will not prevent auto-dialer programs from contacting the participant’s household.

Add – click this button to create a new line in the Family Members area and refresh the information in the Member Data section.

Delete – click this button to delete the household member you have highlighted in the Family Members area.

Adjunct Programs – the information you enter in this section will automatically be transferred to the Maintain Adjunct Programs window.

Same as Residence – When the mailing address is the same as the residential address, click this checkbox to avoid having to enter the address twice.

Save – click this button to save all the information in the window, trigger Dual Enrollment and Participant Overview searches, assign WIC ID numbers to household members, and activate the Schedule Appointment button.

HOUSEHOLD COMPOSITION WINDOW

There are specific criteria for determining who should be included in a participant’s economic unit, or as the WIC program refers to it, household. Unlike many other social service programs, WIC does not examine legal responsibility or familial relationship when approximating household size. Instead, WIC staff must figure out who lives together, shares income, and consumes the same goods and services. When a group of people meets those three criteria, they are considered to be interdependent and must all be included in the Household Composition window in WICSIS.

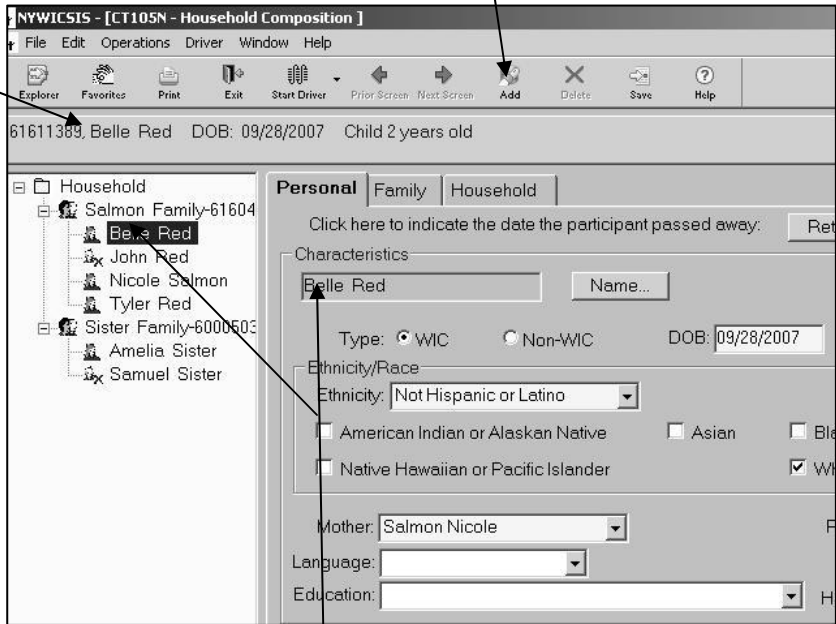
The Household Composition window is divided into three tabs that capture demographic information about individuals, as well as the relationships among and between household members. All of the data that you (or your coworker) entered in the Applicant Pre-screen window when the household was created was automatically transferred into this window. The information listed in the Household Composition window affects eligibility for the WIC program, how the WIC food package is divided among WIC checks, growth charts, allowable food substitutions, and several other areas in WICSIS – so make sure you always review it with applicants and participants!

This header summarizes basic information about the person whose name is highlighted in the Household Tree area (i.e., WIC ID number, name, date of birth, WIC category).

Household Tree – review this section with the enrolling parent or guardian, applicant, or participant to make sure that everyone who is part of his or her household is listed here. The people listed here establish the household size for income determination purposes.

Every household in WICSIS is divided into one or more families. This image displays a two family household.

Add – click this button to add a new person to the household. Make sure you see a blank template before you start entering his or her information.



The information that appears on the right side of the screen is specific to the person you have highlighted in the Household Tree section. Make sure you highlight the correct person before entering or updating any information!

Household Composition Window – Personal Tab

The personal tab is used to record demographic information about each household member. WICSIS automatically saves information when you click on a new tab or different household member, or close the window and click “Yes” in the dialog box. Although only certain fields are required (highlighted in blue), you should try to gather/enter as much information as possible about all applicants, participants, and non-WIC household members.

DOB – make sure each individual’s date of birth is listed correctly here (WIC and non-WIC). Not only does this information affect participants’ certification periods, growth charts, and eligibility for the WIC program, it also cannot be edited after a participant is enrolled in the program.

Sex – use this dropdown menu to record the sex of every household member. Similar to the DOB field, this information affect participants’ growth charts and cannot be edited after a participant is enrolled in the program.

Name... – click this button to enter or edit the name of the applicant, participant, or household member.

Type – use these radio buttons to indicate whether the person is WIC or non-WIC. Certain fields are required for WIC types (e.g., DOB, Sex, Ethnicity, Relationship to CT, etc.)

Ethnicity/Race – use this area to record the ethnicity that a participant most identifies with and at least one (or all applicable) race categories.

Mother – use this dropdown menu to select the name of a child or infant’s birth mother. This field is mandatory for all WIC type infants and children and is prefilled with the names of all females in the household who are at least ten years old. Select Not Applicable if the WIC participant is a foster child or if the birth mother does not reside in the household.

Personal | Family | Household

Click here to indicate the date the participant passed away:

Characteristics

Belle Red

Type: WIC Non-WIC DOB: 03/28/2008 Sex: Female

Ethnicity/Race

Ethnicity: Not Hispanic or Latino

American Indian or Alaskan Native Asian Black or African American

Native Hawaiian or Pacific Islander White

Mother: Salmon Nicole Relationship to CT: Daughter

Language: Marital Status:

Education: Health Care Insurer: Medicaid Managed Care

Certification History

Begin Date	End Date	Category	Status	High Risk	Priority
00/00/0000	00/00/0000	Child	Pending	<input type="checkbox"/>	

Household Composition Window – Personal Tab (continued)

Retire... – click this button to record the death date for a household member. Once this date is recorded, WICSIS will automatically remove the person from the household. If this button is not enabled for you, you must contact your Coordinator or Site Manager when you learn that a WIC household member passed away.

Referrals... – click this button to view or record referral information (i.e., referrals to other social service programs, who referred the applicant/participant to WIC).

Notes... – click this button to open the Notes window, where you can record new information about participants and household members or view old notes.

Alias... – click this button to edit or record aliases (e.g., nickname, maiden name). Please note: Dual Enrollment and Participant Overview searches do not have access to this information.

Relationship to CT – use this dropdown menu to record the household member's relationship to the primary caretaker (i.e., Self) in his or her family. Selecting Foster Child here will disable certain mandatory fields in the Maintain Nutritional and Behavioral Data window.

Marital Status – use this dropdown menu to record the household member's marital status.

Health Care Insurer – use this dropdown menu to record health care information. If an applicant or participant tells you that he or she has no health care, be sure to provide a health care referral.

Begin Date	End Date	Category	Status	High Risk	Priority
00/00/0000	00/00/0000	Child	Pending	<input type="checkbox"/>	

Language and Education – use these dropdown menus to record a participant's primary language and the highest grade level that was completed. These fields are mandatory for pregnant, postpartum, and breastfeeding participants.

Certification History – this area provides category, status, beginning/end date, and risk/priority information for current and past certifications.

Household Composition Window – Family Tab

The information contained on the Family tab of the Household Composition window is specific to the family of the person who is highlighted in the Household Tree area. This tab allows the primary caretaker to customize his or her family’s WIC experience (e.g., specifying contact information, authorizing proxies, etc.) If the participant is a foster child, you will use this tab to record the contact information for and names of his or her foster parents. Whenever foster parent information changes, you should always write a note that includes name and contact information, along with contact information for the foster care agency.

Mailing Address – this area displays the address where the family receives mail. Click the Address button to add or edit this information. Click the Copy to All button to make this address the mailing and residential address for every person in the household.

Proxies – this area displays the names of the people selected to be proxies or representatives. A checked box indicates a representative and an unchecked box indicates a proxy. Click the Add button to edit information and the Delete button to remove a proxy or representative. Do not make any changes here until you see a completed Authorization form. The names that are displayed here will also be listed on the WIC ID Card.

Personal **Family** Household

Mailing Address
2 Beornottobe Rd Albany, NY 12207

Copy to All Address

Proxies

Proxy
Michael Winters Caretaker

Add Delete

Migrant Family: No Shopping Visits: 3 (Monthly)

Phone Number: (518) 459-6623 Phone Type: Cell Phone

Family Members

Name	Category	Certification Status	Latest Begin Date
Nicole Salmon	Pregnant Woman	Pending	
Tyler Red	Child	Pending	

Shopping Visits – this number affects how each participant’s food package is split up among his or her WIC checks (i.e., increasing this number will increase the number of checks that the participant receives). This number does **not** affect the size of the actual food package.

Phone Number and Phone Type – use these fields to display the family’s preferred phone number and type of phone. Please note: selecting Do Not Call will not prevent auto-dialer programs from contacting the participant’s household. If the primary caretaker does not want to be contacted by phone, record his or her phone number in the Notes window along with a note detailing the situation.

Migrant Family – use this dropdown menu to record the family’s migrant status. Selecting Yes here will automatically generate a risk in WICSIS.

Family Members – this section displays information about the current certification status for each family member.

Household Composition Window – Household Tab

The Household tab of the Household Composition window displays information that pertains to the entire household (economic unit) of the person highlighted in the Household Tree area.

Household Composition – this section displays a summary of the total number of people in the household, as well as a breakdown of the WIC and non-WIC type members. Although the summary here does not include unborn fetuses, WICSIS does automatically increase the household size by one for every prenatal WIC type person in the household when assessing for income eligibility.

Residential Address – this area displays the address where the household resides. Click the Address button to add or edit this information. Click the Copy to All button to make this address the mailing and residential address for every person in the household.

Housing Type – use this dropdown menu to document the type of residence (fixed address, shelter, no fixed address) and whether household members are able to heat and refrigerate/freezer their food (adequate food preparation or inadequate food preparation). No Fixed Address refers to participants who are homeless. Selecting this option will automatically generate a risk, reduce the issuance cycle to one month, and allow nutritionists to substitute certain “shelf ready” foods in the WIC food package.

Personal | Family | **Household**

Residential Address
2 Beornottobe Rd Albany, NY 12207

Copy to All | Address

Household Composition
Household Size: 6
WIC Members: 4
Non-WIC Members: 2

Housing Type: Fixed address, adequate food preparation

Care Plans – provides information on any high risk care plans that were created for the highlighted family member. The details of the highlighted care plan appear on the bottom half of the screen.

Open Date	Close Date	Last Updated	Required	Risk Start Date	Risk End Date
07/01/2010	07/01/2010	07/01/2010	<input checked="" type="checkbox"/>	00/00/0000	00/00/0000

Risks – displays the nutritional risk criteria that were used to qualify the highlighted member for his or her most recent certification period.

Category	Source	Risk	Ris
Anthropometry	CPA	Low maternal wt gain based on prepreg BMI	06/
	Sys	Prepreg BMI >=25	06/
	Sys	Maternal wt loss during preg 1st trimester	06/
Dietary Factors	Sys	Diet low in calories/nutrients or malabsorption after bariatric surgery	06/

Benefit Issuance – displays issuance information for food packages that were authorized, issued, or reissued for the highlighted participant.

The details of the highlighted issuance month appear on the bottom half of the screen, including the percentage of proration and quantity of each food item.

The Next Check Date section includes the next Not Good Before (NGB) date along with a Return Formula button that leads to a list of dates reflecting when cans of formula were returned.

Auth Dt	Auth By	Print By	Check Type	Issue Type	Status	NGB Date	NGA Date
06/23/2010	mpachris	mpachris	Individual	Original	Issued	06/23/2010	07/22/2010

NGB Date	Proration%	Food Item	Form	Type	Qty	Unit
06/23/2010	0%	Eggs			1	Dozen
		Milk		Nonfat or 1%	22	Quart
		Peanut Butter			1	18-Ounce
		Vegetables and /or h / Frozen / Car			1	\$10.00
		WIC Bread			1	16-Ounce

Date of Issuance	Bypass User	Reason for Bypass	Next Check Date:
			07/23/2010
			Returned Formula

