Mid-Certification Appointment

Intake Activities

Step 1 Local Agency Search	1. **Locate** existing participant record.

Step 2 Mark Attended or On-Site	**Attended Scheduled Appt.:** 1. Go to the **Daily Schedule** and locate your Mid-Cert appointment. 2. Click on the appointment slot, then click the 'Attended' button. 3. When the pop-up box appears, check the **Attend** column for your participant. 4. Click on the **Close** button to close the popup.	**On-Site**, no scheduled appt.: 1. Click the **Mark on Site** button. A popup "How may I help you today" will display. 2. Click the "Service" column to select the appropriate appointment type, **MID-CERT**. Click "**Close**" to save the screen and close the popup. 3. An appointment will auto-generate on the Daily Schedule and participant is added to onsite list.

Step 3 Household Info Screen	1. **Verify/Update** address, phone, etc. as applicable. 2. **Close** participant record by clicking the **Search** icon. 3. Participant is now ready for the CPA.

If a participant/household has never had an EBT card issued, follow the Certification Flow Sheets for issuance.

CPA Activities *(*required screens, refer to NPS: Documenting in WIC MIS for mid-certification requirements)*

Step 1 Open Participant Record	1. Using the **Onsite List,** locate and **select** the desired record. 2. Record will open to the **Household Summary** screen at the participant level.

Step 2 Setting the Stage	1. **Review** previous notes, if applicable. 2. **Explain** to participant what to expect and length of time of the appointment.

Step 3 Cert Action Screen *Breastfeeding dyads only*	**Note:** Complete **ONLY** for a breastfeeding woman and a breastfeeding infant if their breastfeeding status has changed. If changes have occurred since the last visit, click on the **BF Status Change** button and answer the questions as appropriate for each participant.

Step 4 *** Lab Screen**	1. Add height, weight and if required, blood work and immunization status (reviewed/referred) per IL WIC PPM.

Step 5
Breastfeeding Screen
*Breastfeeding dyads only
	1. Review and update breastfeeding screens as appropriate.
	    a. Ensure that mom and baby are linked (single gestation).
	    b. Check ***Verified** to indicate that the **BF Information** was reviewed.
	    c. Complete/update **BF Questions** as appropriate.
	2. Add any **new BF Support & Notes**, click **Next.**

Step 6 ***Mid Certification Screen**	1. **Enter data** for the required questions (bold/*) and as many of the optional questions as possible. 2. **If any changes to health status**, update Health and Nutrition screens as appropriate. 3. Click the **Save** or **Next** button to save the data.

Step 7 **Nutrition Risk** Review / update as needed	1. Review if new information has been added to other screens. 2. Any new risks will be assigned when the screen is opened. **Reason Button** will display a description of why and where the risk was assigned. **Risk Help Button** will open the IL WIC Nutrition Risk Criteria.

Step 8
*Nutrition Education
 	
Use: *NPS- Effective Secondary Education* for requirements on effective individual education
	1. Provide nutrition education based on mid-certification assessment, review of current risk factors and previous notes.
	Document:
	2. Click **Add** to enter a Nutrition Education topic discussed.
	3. Click in the **Method** box to select type of education, **Secondary Individual**
	4. Select main **Topic** discussed from the dropdown.
	5. Add a **Note** - document WIC nutrition education provided.
	    a. This includes additional topics discussed, handouts reviewed/requested related to the topic, nutrition education details, participant centered goal(s) and what follow up is planned for the next visit.
	    b. Refer to *NPS- Documenting in WIC MIS* for guidance.
	    c. Staff may use the Care Plan/SOAP screen (follow up section) to document the mid-cert note per agency decision on documentation.
	6. Click **Next** to move to the **Food Prescription Screen**.

Step 9
*Food Prescription
 	
Use: *Health Options for WIC* handout
	1. Review to see if food packages have already been assigned, if not, click **Add** to assign a core food package.
	2. **Ask**: Would you like to make any changes to your WIC benefits?
	    a. Tailor core package to meet participant's need and preferences.
	    b. Remove any foods the participant is allergic to.
	Infants Only
	Only add 6-8 mo. packages – assessment of readiness/education/discussion is required at the 9 mo. visit to determine the option of continued baby food in containers only or change to option of fresh fruit and vegetable partial substitution

	based upon infant's development.

Step 10 ***Issue Benefits** **Review with Participant**	1. **WIC ID Card** – participant rights / responsibilities, clinic contact information, next appointment, shopping guidance and service end dates. 2. **Use of EBT card**, use "Illinois WIC EBT Card" handout. 3. Review with HoH how to **set up a pin** for the EBT Card (if new card assigned) 4. **Family Shopping List**, **IL WIC Food List**, and how to get the full nutrition benefit from the foods in their package 5. **WIC EBT Authorized Vendor list** for your county **Ask**, "What questions or concerns do you have about shopping for WIC foods or using your EBT card?"

Step 11 **Referrals** **Schedule Appointment** **Print Documents** 	1. Review and follow up on previous **Referrals**. Update/add as needed. 2. **Schedule** next appointment, on or before the **BVT** date. 3. **Print** applicable documents for participant