

Name:

Date of Hire:

Frontline Orientation Checklist

The Frontline Orientation Checklist is to be completed within the first 90 days of hire. **Items with an asterisk (*) must be completed within the first two weeks.** The * items are identified priority areas (WIC Basics) that can assist with efficient onboarding. With the completion of this checklist, Frontline staff will be able to:

- Identify the WIC program policies and competencies working in the role as Frontline staff.
- Evaluate WIC program eligibility and document appropriately in the WIC MIS.
- Provide participant-centered services to all participants in the WIC program.

The IL WIC Policy Manual, associated addenda, and most handouts referenced throughout the checklist can be found on the Community Health Training Center website, WIC Policy Manual webpage: [WIC Policy Manual - Springfield Urban League](#). Other documents and resources referenced can be found by clicking on the link, copying the link into your web browser, or by asking your supervisor or WIC Coordinator.

Once you have completed the Frontline Orientation Checklist, please complete the evaluation form (link to form provided at the end of this document), and provide the checklist to your WIC Coordinator.

Introduction/Overview of WIC

Date Completed	Estimated Time	Activities
	2-3 days	*Orientation to agency and clinic. Including: Observe a variety of WIC visits from start to finish: Frontline → anthro/biochem collection → CPA → back to Frontline (if applicable). (Work through other orientation activities between visits.)
	~30 min	*Review IL WIC PM AD 4, 5, 11.4 and 15: Records, Confidentiality, WIC Staffing: Clerk/Frontline, and Employee Compliance. *Review Addendum PPS Secure and Confidential Communications with WIC Participants (IL WIC PM AD 5.2)
		*Complete/sign the Addendum Illinois WIC Employee Confidentiality & Compliance Agreement Signature Form (WIC PM AD 15.1) <input type="checkbox"/> Provide the completed Confidentiality Form to the Coordinator.
Civil Rights Training is required before participating in program activities:		
	~1hr	*Complete mandatory Civil Rights Training https://tinyurl.com/CRtrain <input type="checkbox"/> Provide Coordinator with your certificate after completing the training.

Illinois WIC Management Information System (MIS) Basics

Date Completed	Estimated Time	Activities
	Complete on Day 1.	*Coordinator to fill out WIC MIS User Request form for access to WIC MIS. (IL WIC PM AD Addendum 2.7 PPS WIC MIS Access). After account creation, Coordinator and new employee will receive an email from DHS.WIC.MISAccess with further instruction to access the I-WIC Training and Production environments.

Date Completed	Estimated Time	Activities
		Illinois' I-WIC Web-Based Training (WBT) modules, module worksheets, and materials are found here: IWIC Resources - Springfield Urban League Complete the following I-WIC Web-Based Training modules specific to the Frontline role and corresponding worksheets: Modules: 1, 2, 3, 4a, 5a, 6 and 12. Coordinator will review worksheets with you upon completion.
	81 min	*Complete WBT Worksheet 1 Modules 1-3, 6 & 12
	67 min	*Complete WBT Worksheet 2 Modules 4a-c questions: 1-17 only
	70 min	*Complete WBT Worksheet 3 Modules 5a-d questions: 1-14 only
	1 Day + prework	Complete IWIC Frontline Training via Community Health Training Center https://tinyurl.com/trainFL <ul style="list-style-type: none"> Registration open to those who have been in their role for at least 1 month. <input type="checkbox"/> Provide Coordinator with your certificate after completion.
	20 min	*Review with Coordinator WIC EBT equipment and proper use (card reader, signature pad, scanner).
	20 min	Review the following documents and agency processes with Coordinator: <ul style="list-style-type: none"> I-WIC Issue Reporting Form BNFT App or Website Issue Reporting Form

Illinois WIC Breastfeeding Support and Promotion

Date Completed	Estimated Time	Activities
	4 hours	Initial Breastfeeding training includes the USDA's Breastfeeding Curriculum. Complete WIC Breastfeeding Curriculum Level 1 and Level 1 Handouts. https://tinyurl.com/Level1BF <input type="checkbox"/> Provide Coordinator with your certificate after completing the training. Make sure you only register once as DHS is charged for every registration **Must be completed within 6 months of hire.**
	Varies	*Complete local agency orientation to agency's Breastfeeding Peer Counselor (BFPC) Program, if applicable. <input type="checkbox"/> N/A
	15 min	Review Addendum NPS: Breastfeeding Competencies (IL WIC PM AD 11.5)
	1 Day	Observe and/or meet with BFPC (if applicable), BF Coordinator and/or Designated Breastfeeding Expert (DBE) to understand their role in WIC.
	15 min	*Discuss with Coordinator places within the clinic where mothers requesting to breastfeed or pump can go, if not comfortable feeding/expressing in public areas.

Illinois WIC Frontline Role in the WIC Eligibility Determination Process

Date Completed	Estimated Time	Activities
	4-6 hours for entire section (continued on p3)	Review addenda Vendor Issue Reporting Form and Vendor Issue Reporting Process Details (IL WIC PM AD 1.1); discuss with Coordinator Local Agency process for submitting a form.
		*Review Addendum Illinois Paper Certification Form Frontline (IL WIC PM AD 2.7). Discuss with WIC Coordinator where to locate forms in clinic and when they should be used.

Date Completed	Activities
	* Review IL WIC PM AD 13 and associated addenda: NVRA Process.
	* Review IL WIC PM CS 1: General Eligibility Requirements and the following addenda: Approved Eligibility Documentation (IL WIC PM CS 1.1) 30 Day Certification No Proof Form (IL WIC PM CS 1.1) Assessing Separate Households (IL WIC PM CS 1.2) Rights and Responsibilities (IL WIC PM CS 1.3)
	* Review IL WIC PM CS 2: Physical Presence Review the Exceptions to Physical Presence Flow Chart: Exceptions to Physical Presence Flow Chart 7.24.pdf
	* Review IL WIC PM CS 3: Residency Determination
	* Review IL WIC PM CS 4 and associated addenda: Income Eligibility Determination
	* Review IL WIC PM CS 5 and associated addenda: Identity Determination
	* Review IL WIC PM CS 7: Priority System for Nutrition Risk Criteria
	* Review IL WIC PM CS 8: Certification Periods and Addendum IWIC Appointments (IL WIC PM CS 8.1 & 9.1)
	* Review IL WIC PM CS 9: Maintaining Quality Assurance for One Year Certifications
	Review IL WIC PM CS 10.2, 10.3, 10.4: Caseload Management
	* Review IL WIC PM CS 11: Participant Records and Addendum I-WIC Flow Sheets (IL WIC PM CS Addendum 11.1) <ul style="list-style-type: none"> • Frontline Certification Flow Sheet • Mid-Certification Flow Sheet (Frontline section) Print a copy of each Flow Sheet to have available as a desktop reference.
	Review IL WIC PM CS 12 and associated addenda: Transfer of Certification
	Review IL WIC PM CS 14 and associated addenda: Ineligibility and Termination Process
	* Review IL WIC PM SFD 2.2: Establishing Benefit Delivery - Proxy & Designated Shoppers.
	Discuss with WIC Coordinator the Frontline role for local referrals and consent process/Release of Information at your Agency, as well as documentation in WIC MIS.
	Complete the Frontline Orientation WIC Policy Check Your Knowledge Worksheet (SSM) 1.26 and review with Coordinator (worksheet and key provided by Coordinator).

Illinois WIC Frontline Role with Nutrition Education, Documentation and Customer Services (PCS)

Date Completed	Estimated Time	Activities
	~40 min	<p>*Watch USDA’s Introduction to Value Enhanced Nutrition Assessment (VENA) Videos: https://tinyurl.com/VENAintro</p> <ul style="list-style-type: none"> <input type="checkbox"/> 1A Introduction to VENA: Nutrition Assessment in WIC <input type="checkbox"/> 1B Introduction to VENA: A Systemic and Personalized Process <input type="checkbox"/> 1C Introduction to VENA: Conducting a WIC Nutrition and Breastfeeding Assessment <p>Note: The WIC nutrition assessment is completed by CPA/CPAA staff; however, Frontline staff should be familiar with the WIC visit process and what participant-centered services look like.</p>
	1-2 hours	<p>*Review IL WIC PM NE 5: Secondary Nutrition Education- Review types of Nutrition Education available in WIC.</p> <p>*Review Addendum I-WIC Flow Sheets (IL WIC PM CS Addendum 11.1); focus on Frontline staff sections</p> <ul style="list-style-type: none"> • Individual Nutrition Education (In-person or Telephone) • WIChealth Nutrition Education • Group Nutrition Education <p>*Review Addendum NPS Documenting in WIC MIS (IL WIC PM CS 11.2) Frontline will use Alerts, General Notes, Referrals, abbreviations, and proper name and address entry.</p> <p>*Review and discuss with Coordinator expectations per agency process for: Addendum PPS WIC Program Explanation (WPE) (IL WIC PM NE 4.2). Addendum WIC ID Card (IL WIC PM CS 5.3) – discuss with Coordinator purpose, explanation to participants, and completion.</p>
	1 hour	<p>*Familiarize yourself with the WIChealth nutrition education website. This activity will assist staff in helping WIC Families access the WIChealth site & understand its functionality.</p> <ol style="list-style-type: none"> 1) Create staff account: https://www.wichealth.org/Support <ol style="list-style-type: none"> a) Click on Sign Up and follow the instructions to request a staff account. 2) Log into WIChealth Support. <ol style="list-style-type: none"> a) Navigate to and click on Staff Training Academy <ol style="list-style-type: none"> i) Complete the course: Let’s Take a Tour ii) <input type="checkbox"/>Print and submit certificate to Coordinator b) Click on “Resource Library” in the navigation bar at the top of the page. <ol style="list-style-type: none"> i) Explore the “wichealth” category for promotional materials you can provide to participants. c) Click on “Home” at the top right of the page, then “Login as Client.” <ol style="list-style-type: none"> ii) Complete 1-2 lessons of your choice iii) <input type="checkbox"/>Print and submit certificate(s) to Coordinator 3) Ask a peer or your Coordinator to demonstrate how to manually look up completed lessons and discuss why/when this would be done.
		<p>*Review Addendum NPS Nutrition Education (IL WIC PM NE 1.1): Addendum 2 Benefit Issuance by Frontline</p>

Illinois WIC Anthropometric and Biochemical Assessment Process (Frontline & Lab)

If certain tasks are not applicable to your agency's Frontline role, please write "N/A" in the corresponding rows. Or if entire section is not applicable to your role, mark this checkbox: N/A

Date Completed	Estimated Time	Activities
	30 min	<p>*Review IL WIC PM CS 6.1- 6.4: Nutrition Assessment and the following addenda: Addendum Anthropometric Flow Sheet (IL WIC PM CS 6.2) Addendum Biochemical Flow Sheet (IL WIC PM CS 6.3)</p>
		<p>*Review IL WIC PM AD 2.7 Addenda WIC Paper Assessment Tool - all participant categories (<u>Lab pages only</u>) and WIC Paper Assessment Tool: Mid Certification. Discuss with WIC Coordinator where to locate forms in clinic and when they should be used.</p>
	15 min 25 min 20 min	<p>*Complete the following: MCHB Growth Charts Training modules: https://tinyurl.com/AnthroTrain</p> <ul style="list-style-type: none"> • Accurately Weighing and Measuring Infants, Children and Adolescents: <ul style="list-style-type: none"> <input type="checkbox"/> Equipment <input type="checkbox"/> Technique <input type="checkbox"/> Developing & Rating Your Technique
	1 Day	<p>Observe peers collecting anthropometrics and biochemical data on variety of participants to ensure understanding of the WIC process and your role.</p> <p><input type="checkbox"/> Complete Agency's internal training/procedures for anthropometric and biochemical assessment.</p>
	20-25 min	<p>*Complete Check Your Knowledge worksheet: Level 1 Ch 5 Check Your Knowledge.pdf *Then, View the Anthropometric & Bloodwork Training Module: DHS (Bloodwork Training Module)</p>

WIC Benefit Issuance

Date Completed	Estimated Time	Activities
	~2 hours (continued on p6)	<p>Review Addendum Illinois WIC Food Package Tables (IL WIC PM SFD 7.2)</p> <ul style="list-style-type: none"> • Staff should be familiar with foods and formulas offered in Illinois WIC, and the Medical Nutritional Prescription Form.
		<p>Explore the resource Illinois Interactive Food Guide: IllinoisWICFoods.org</p>
		<p>*Review the following participant educational handouts, found here: https://tinyurl.com/IWICtrain</p> <ul style="list-style-type: none"> • Using Your Illinois eWIC Card brochure • WIC Benefit App • Understanding the Family Shopping List • EBT Card Guide for Participants • Reading WIC EBT Receipts • EBT Transactions • EBT Card Status • Bnft App (PowerPoint slide deck, staff use only) <p>Discuss with WIC Coordinator those most commonly distributed by Frontline at your agency.</p>

Date Completed		Activities
		Review WIC Centralized Resource Library (downloadable Excel document) for available Handouts and Electronic QR codes under the tab “IWIC”. https://tinyurl.com/DHSmaterials
		*Review Addendum WIC Food List (IL WIC PM SFD 4.2)
		Review Authorized WIC Vendor List (provided by Coordinator) & Addendum WIC Food and Nutrition Centers Program (IL WIC PM SFD 1.1) (if appropriate/located in or near City of Chicago)

Staff Observations

Date Completed	Estimated Time	Activities
	Varies	Review and discuss with Coordinator the SFY26 Frontline Observation Worksheet.
		Using the Frontline Training Observation Tool, observe all Frontline staff completing various certification and mid-certification visits; document all that apply. Types of appointments: <input type="checkbox"/> Certification (new applicants): # reviewed <input type="checkbox"/> Re-Certification (returning households): # reviewed <input type="checkbox"/> Mid-Certification: # reviewed Categories observed: <input type="checkbox"/> PG <input type="checkbox"/> BE <input type="checkbox"/> BP <input type="checkbox"/> NP <input type="checkbox"/> IBE <input type="checkbox"/> IBP <input type="checkbox"/> IFF <input type="checkbox"/> C1 <input type="checkbox"/> C2 <input type="checkbox"/> C3 <input type="checkbox"/> C4 <input type="checkbox"/> Provide completed Observation Tools to Coordinator and discuss observations with Coordinator.

Evaluation

Once checklist is complete, please provide DHS with feedback about your orientation and training by completing the required evaluation.

Date Completed	Estimated Time	Activities
	10 min	Complete Frontline Evaluation: https://forms.office.com/g/vmt2CztZ7z

I have been trained on the information above and have completed this list to the best of my ability and will follow up with my Coordinator with any questions.

Staff Signature _____

Date: _____

Coordinator Signature _____

Date: _____

*After reviewing, Coordinator should keep Orientation Checklist and all related orientation documentation on file.