

Name:

Date of Hire:

Competent Professional Authority (CPA) Orientation

The CPA 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 completion of this checklist, CPAs will be able to:

- Identify the WIC program policies and competencies working in the role as a CPA.
- Implement WIC nutritional assessment across all participant categories to assign appropriate risk factors, provide education, tailor benefits and provide referrals.
- Provide participant-centered nutrition counseling and education to all participants in the WIC program.

The IL WIC Policy Manual, associated addenda, and 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 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 CPA Orientation Checklist, please complete the evaluation form (link provided at the end of this document), and provide the checklist to your WIC Coordinator.

Introduction/Overview of WIC

Date Completed	Estimated Time	Activities
	One week	*Orientation to agency/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, 11.3 and 15: Records, Confidentiality, WIC Staffing: Competent Professional Authority, 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 (IL WIC PM AD 15.1) <input type="checkbox"/> *Provide the completed Confidentiality Form to the WIC Coordinator
Civil Rights Training is required before participating in program activities		
	~1 hour	*Complete mandatory Civil Rights Training https://tinyurl.com/CRtrain <input type="checkbox"/> *Provide your certificate to the WIC Coordinator after completing the training.

Illinois WIC Management Information System (MIS) Basics

Date Completed	Estimated Time	Activities
	Complete on Day 1. (continued on p2)	*Coordinator to complete and submit 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 to 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 . Coordinator will review worksheets with you upon completion.		
	81 min	*Complete WBT Worksheet 1 Modules 1-3, 6 & 12
	41 min	*Complete WBT Worksheet 2 Modules 4b-4c
	52 min	*Complete WBT Worksheet 3 Modules 5b-5d
	56 min	*Complete WBT Worksheet 4 Modules 7-11
	15 min	*Review Addendum I-WIC Flow Sheets (IL WIC PM CS 11.1) Print or bookmark to have available as a desktop reference. <ul style="list-style-type: none"> • CPA/CPAA L2 Certification • Mid-Certification • Individual Nutrition Education (In-person or Telephone) • WIChealth Nutrition Education • Group Nutrition Education
	3 consecutive mornings from 9 am-12:45 pm + Prework	Complete IWIC CPA Training via Community Health Training Center: https://tinyurl.com/trainCPA <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, and scanner as applicable).
	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
L1: L2: L3:	Level 1: 4 hours Level 2: 12 hours (4 hours/day for 3 days) Level 3: 8 hours (4 hours/day for 2 days)	Initial Breastfeeding training includes the USDA's Breastfeeding Curriculum. <input type="checkbox"/> Complete WIC Breastfeeding Curriculum Level 1 and Level 1 Handouts. https://tinyurl.com/Level1BF <input type="checkbox"/> Complete Level 2 (register at link below) <input type="checkbox"/> Complete Level 3 (register at link below) https://lactationeducation.com/illinois <input type="checkbox"/> Provide Coordinator with your certificate(s) after completion. Make sure you only register for each session once as DHS is charged for every registration. **L1-L3 must be completed within 6 months of hire.**
	45 min (continued on p3)	*Review IL WIC PM AD 10 Administrative Support of Breastfeeding and associated addenda: NPS Breastfeeding (IL WIC PM AD 10.1) Electric Breast Pump Loan/Release Form, if applicable (IL WIC PM AD 10.2) *Print Addendum 3 within NPS Breastfeeding ("WIC Breastfeeding Dyad Education") to be used as a desktop reference for participant education. Review Addendum NPS: Breastfeeding Competencies (IL WIC PM AD 11.5)

		Review Addendum Documenting in WIC MIS (IL WIC PM CS 11.2) <ul style="list-style-type: none"> • Focus on Breastfeeding Support & Notes section.
Date Completed	Estimated Time	Activities
	20-30 min	Explore the USDA WIC Breastfeeding Support website for more information on breastfeeding support resources: https://tinyurl.com/USDABF101 .
	2 hours	Complete HUG Your Baby training. Coordinator should contact DHS Breastfeeding Manager for registration information. * Make sure you only register once DHS is charged for every registration. <input type="checkbox"/> Provide Coordinator with certificate of completion.
	Varies	Complete local agency orientation to agency's Breastfeeding Peer Counselor (BFPC) Program, if applicable. <input type="checkbox"/> N/A
	1 day	Observe and/or meet with BFPC (if applicable), BF Coordinator and/or Designated Breastfeeding Expert 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 or expressing milk in public areas.

Illinois WIC Nutrition Assessment Process

Date Completed	Estimated Time	Activities
	30 min	Review Addenda Illinois WIC Paper Assessment Tools by category for Pregnant, Breastfeeding, Postpartum, Infant, and Child, as well as Mid-certification by category (IL WIC PM AD 2.7). Review with WIC Coordinator where to locate forms in clinic and when they should be used.
		* 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
	1 hour	* Discuss with WIC Coordinator methods of data collection for anthropometrics and bloodwork. Review IL WIC PM CS 6: Nutrition Assessment and associated addenda: Anthropometric Flow Sheet (IL WIC PM CS 6.2) WIC Medical Referral Form (IL WIC PM CS 6.2) Validation/Calibration Log (IL WIC PM CS 6.2) Biochemical Flow Sheet (IL WIC PM CS 6.3) IWIC Assessment Guides (IL WIC PM CS 6.5)

Date Completed	Estimated Time	Activities
	15 min 25 min 20 min	<p>*Complete the 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 <p><input type="checkbox"/> Complete Agency’s internal training/procedures for anthropometric and biochemical assessment.</p> <p><input type="checkbox"/> N/A (not a CPA task at my agency)</p>
	20-25 min	<p>*Complete Check Your Knowledge worksheet: https://tinyurl.com/LabCheckWS</p> <p>*Then, View the Anthropometric & Bloodwork Training Module: https://tinyurl.com/AnthroBlood</p>
	~1 hour	<p>Complete “Staff Training Introduction to VENA” and SSM: https://tinyurl.com/WICstafftrain</p> <ul style="list-style-type: none"> • USDA’s Introduction to Value Enhanced Nutrition Assessment (VENA) Videos can be accessed here: https://tinyurl.com/VENAintro (SSM Key provided with Coordinator Documents.) <p><input type="checkbox"/> Provide Coordinator with certificate after completion.</p>
	~2 hours	<p>*Complete Category Specific Risk Factor Training and SSMs: https://tinyurl.com/WICstafftrain</p> <ul style="list-style-type: none"> <input type="checkbox"/> Infant IWIC Risk Factor Training <input type="checkbox"/> Women Risk Factor Training <input type="checkbox"/> Child Risk Factor Training <p>Review SSM(s) with the Coordinator. (Infant RF SSM Key provided with Coordinator Documents.)</p> <p><input type="checkbox"/> Provide Coordinator with your certificate(s) after completion of each training.</p>
	1-2 hours	<p>Review and save/bookmark the resources for WIC Nutrition Risks: USDA-WIC-Nutrition-Risks-7.23-1.pdf</p>
		<p>Review IL WIC PM CS 7 Priority System for Nutrition Risk Criteria</p>
	~1 hour	<p>Review IL WIC PM CS 8 Certification Periods</p> <p>Review IL WIC PM CS 9.1 Maintaining Quality Assurance for One Year Certifications</p> <p>Review Addendum IWIC Appointments (IL WIC PM CS 8.1 & 9.1)</p>
		<p>Review IL WIC PM CS 10.2, 10.3 Caseload Management</p>
		<p>Review IL WIC PM CS 13 Referral to Services.</p> <p>Discuss with Coordinator local referrals and consent process/Release of Information at your agency, as well as documentation in WIC MIS.</p>

Illinois WIC Nutrition Education and Counseling

Date Completed	Estimated Time	Activities
	2-3 hours	<p>*Review IL WIC PM NE 1.1 General Guidelines Education and Addendum NPS Nutrition Education (IL WIC PM NE 1.1)</p> <p>*Review IL WIC PM NE 2.1 Nutrition Education Goals</p> <p>*Review IL WIC PM NE 4 Certification Education</p> <p>*Review and discuss with Coordinator: Addendum NPS Counseling Approach (IL WIC PM NE 4.1) Addendum PPS WIC Program Explanation (WPE) (IL WIC PM NE 4.2)</p> <p>*Review IL WIC PM NE 5 Secondary Nutrition Education and all associated addenda</p> <p>Review IL WIC PM NE 6.1 Category Specific Nutrition Education and Addendum NPS Growth of Children (IL WIC PM NE 6.1)</p> <p>Review IL WIC PM NE 7.1 Education Materials</p> <p>*Review Addendum NPS Documenting in WIC MIS (IL WIC PM CS 11.2). <ul style="list-style-type: none"> Focus on Nutrition Ed/Counseling Notes section. Review local agency Nutrition Ed/Counseling Notes in I-WIC with the Coordinator to identify best practices in completing notes.</p>
	1 hour	<p>Complete the Circle Charts SSM and Worksheet: Circle-Chart-SSM-Worksheet-10.21.pdf</p> <ul style="list-style-type: none"> Review all Circle Charts and the education that could be offered for each topic. <p>*Print/keep copies of circle charts as a desktop reference for providing category-specific nutrition education.</p> <p>Review SSM Worksheet with Coordinator (Key provided with Coordinator Documents).</p>
		<p>Review and discuss expectations per agency process with Coordinator for:</p> <ul style="list-style-type: none"> *Addendum WIC ID Card (IL WIC PM CS 5.3) - purpose, explanation to participants, and completion. Addendum Illinois WIC Talk Template (IL WIC PM NE 5.1)
	15-20 min	<p>View the WIC Centralized Resource Library PPT recording. https://tinyurl.com/DHSmaterials</p> <p>*Review and be familiar with WIC Centralized Resource Library (downloadable Excel document) for available Nutrition Education handouts and Electronic QR codes that may be shared with participants.</p>
	10 min	<p>Review IL WIC PM SFD 7 and Addendum Look at Me Now – Infants 6-12 months (IL WIC PM SFD 7.4) regarding the nutrition education required when assigning/issuing the cash value benefit (CVB) for fruits and vegetables to infants.</p>
	1 hour (continued on p6)	<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"> Create staff account: https://www.wichealth.org/Support <ol style="list-style-type: none"> Click on Sign Up and follow the instructions to request a staff account. Log into WIChealth Support. <ol style="list-style-type: none"> Navigate to and click on Staff Training Academy <ol style="list-style-type: none"> Complete the following courses: <ol style="list-style-type: none"> The Who, What, and Why of wichealth.org Let’s Take a Tour <input type="checkbox"/> Print and submit certificates to Coordinator Click on “Resource Library” in the navigation bar at the top of the page.

		<ul style="list-style-type: none"> i) Explore the categories and subtopics for materials you can provide to participants. c) Click on “Home” at the top right of the page, then “Login as Client.” <ul style="list-style-type: none"> i) Complete 1-2 lessons of your choice ii) <input type="checkbox"/> Print and submit certificate(s) to Coordinator <p>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>
		<p>OPTIONAL:</p> <p>Explore the following websites for more information on MyPlate, DGA, and food safety. Bookmark any helpful resources you may want to refer to for participant education and counseling.</p> <ul style="list-style-type: none"> • MyPlate U.S. Department of Agriculture (https://www.myplate.gov) • Dietary Guidelines for Americans, 2020-2025 and Online Materials Dietary Guidelines for Americans (https://tinyurl.com/DGA-2025) • People at Risk of Food Poisoning FoodSafety.gov (https://www.foodsafety.gov/people-at-risk) <ul style="list-style-type: none"> ○ Focus on children under five and pregnant women

Illinois WIC Benefit Issuance

Date Completed	Estimated Time	Activities
	1-2 hours	<p>*Review CPA Competencies: Issuing Formula Products training slides: https://tinyurl.com/WICstafftrain</p> <ul style="list-style-type: none"> • Complete SSM and review with Coordinator after completion. (Key provided with Coordinator documents)
	~2 hours	<p>*Review Addendum Illinois WIC Food Package Tables (IL WIC PM SFD 7.2) Staff should be familiar with foods and formulas offered in Illinois WIC.</p>
		<p>*Review the following participant educational handouts, found here: IWIC Resources - Springfield Urban League</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>Review Addendum WIC Food List (IL WIC PM SFD 4.2)</p>
		<p>Explore the resource Illinois Interactive Food Guide: IllinoisWICFoods.org</p>
		<p>Review Authorized WIC Vendor List (Provided by Coordinator or in WIC MIS under Miscellaneous dropdown).</p> <p>Review Addendum WIC Food and Nutrition Centers Program (IL WIC PM SFD 1.1), if applicable/located in or near City of Chicago</p>
		<p>Review addenda Vendor Issue Reporting Form and Vendor Issue Reporting Process Details (IL WIC PM AD 1.1), and discuss with Coordinator Local Agency process for submitting a form.</p>

Staff Observations

Date Completed	Estimated Time	Activities
	Varies	Review and discuss with Coordinator the SFY26 CPA/CPA Assistant Certification Observation Worksheet.
		Using the CPA Training Observation Tool, observe all CPA staff completing various certification and mid-certification visits; document types of visits observed: <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.
		Observe CPA staff completing various secondary education visits offered by agency; document all that apply: <input type="checkbox"/> In person Individual: # observed <input type="checkbox"/> Telephone Individual: # observed <input type="checkbox"/> Internet Education: # observed <input type="checkbox"/> Self-Study Modules: # observed <input type="checkbox"/> Group: # observed

Illinois WIC State Trainings (Virtual/Remote)

Date Completed or Registered	Estimated Time	Activities
	3 hours	Attend Introduction to Medically Prescribed Formula (MPF) Training Live training registration: Introduction to Medically Prescribed Formula - Springfield Urban League <ul style="list-style-type: none"> • <ul style="list-style-type: none"> ○ 60 days of experience in WIC is REQUIRED to attend training; 90 days is preferred. • After successful completion of the MPF Training: <ul style="list-style-type: none"> <input type="checkbox"/> Provide Coordinator with your certificate of training. ○ Your Coordinator will change your role in WIC MIS from “CPA no MPF” to “CPA.”
	16 minutes	View Explanation of WIC Food Benefits Letter presentation: https://tinyurl.com/WICstafftrain (after completing Introduction to Medically Prescribed Formula (MPF) Training)
	2 hours of prework 3 hours of live training	Attend Using Value Enhanced Nutrition Assessment (VENA) to Guide WIC Services Training <ul style="list-style-type: none"> • Staff must have WIC Clinic experience as a CPA for a minimum of 6 months before attending VENA training. • VENA Training Prework: https://www.springfieldul.org/using-vena-guide-wic-services • VENA Training Registration: https://www.springfieldul.org/event-type/using-vena-guide-wic-services • After successful completion: <ul style="list-style-type: none"> ○ Review activity workbook with your Coordinator.

		<input type="checkbox"/> Provide Coordinator your certificate of attendance.
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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
	10:00	Complete CPA Evaluation: https://forms.office.com/g/Num7fwNUsK

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.