


Nebraska WIC Program


Pre-Training Activities Plan - Clerk Check List


Below are the activities that new Clerks need to complete for phase 1 of their training. These training activities are to be completed at the new employee’s home local agency WIC site under the guidance of a mentor or [training coordinator](#). Use the check list below to document dates planned and completed. All required tasks need to be completed before attending one of our WIC Training Center Sessions (phase 2).


*If staff are not able to complete these pre-training activities, let us know so we can reschedule their WIC Training Center Session or provide assistance to help complete these learning activities. The Clerk training curriculum is progressive and builds on the pre-training skills they begin working on before they come to the training. The minimum required activities before starting phase 2 of training are indicated with this notation. **



New Staff Name: Local Agency Name:	Training Coordinator/Mentor		
	Dated planned	Date Completed	Comments
<p>*Civil Rights Training</p> <ul style="list-style-type: none"> - 2022 Civil Rights Training – Part 1 on Civil Rights Policy (1 hr 30min) -2022 Civil Rights Training – Part 2 – A Call To Action: Addressing Historical and Ending Contemporary Racial Inequities 			
<p>*About WIC – Introductory Videos</p> <ul style="list-style-type: none"> o History of WIC – part 1 o History of WIC – part 2 o WIC History & What You Do Works 			
<p>* WIC Terminology</p> <ul style="list-style-type: none"> - Training Coordinator discuss basic WIC Journey vocabulary or abbreviations used - Authorized representative; additional authorized representative; CPA; nutritional risk; nutrition education; proxy; WIC vendor WIC vendor manager; sanction points; Journey Train; Journey; referrals; processing standards; eWIC Card; WIC Shopper App, Breastfeeding Peer Counselors, abbreviations or acronyms in Journey, WIC ID Card; WIC income guidelines; Adjunct Income Eligibility etc 			
<p>* Benefits of WIC & Eligibility</p> <ul style="list-style-type: none"> - Discuss benefits of WIC - Discuss general eligibility requirements (ID, Income, residency, nutritional risk) - Review Procedures: Categorical Eligibility 			

	Dated planned	Date Completed	Comments
<p>*Food Benefits – Discuss with your LA Vendor Manager</p> <ul style="list-style-type: none"> - 6.10.22 All staff Webinar recording on new foods starting July 2022 Passcode: yeVK4?9+ - Review Nebraska WIC Approved Foods List - Locate & review the Approved Food List on the WIC Shopper App - Visit with Staff to identify specific store brands in your area and where listed on the food brochure - Locate & review the list of WIC Approved Stores in your area - Using the food brochure for help, complete the WIC Approved Foods activity worksheet; Bring any questions to training clinic ____ - Discuss with your training coordinator: Basic WIC Food Packages and Contract Formula that WIC Provides 			
<p>*Nutr Ed Benefits – Discuss with LA Training Coordinator:</p> <ul style="list-style-type: none"> - Nutrition & breastfeeding educational materials available at your clinic; where are they located - Take some time to review the written nutrition & breastfeeding educational materials that WIC provides ____ - Who provides nutrition education at your clinics? - Who are the breastfeeding experts at your clinic? - Do you have breastfeeding peer counselors? 			
<p>*Referral Benefits – Discuss with LA Training Coordinator:</p> <ul style="list-style-type: none"> - Referral resources available in your service area - Contact information for referral resources - Special needs populations that your agency serves - Programs your agency typically refers to ____ - Show the listing of referral resources listed in Journey - Discuss what pamphlets or brochures your clinic has available for referrals to other programs; Where are they located; Which ones are most frequently used? 			
<p>*WIC Clinic Sites – Discuss with LA Training Coordinator:</p> <ul style="list-style-type: none"> - How many WIC clinics your agency offers - Your WIC clinic locations, days open, hours - WIC clinic locations across the state and how to contact - Identify any other WIC clinics in the same city as my WIC clinic - Explore the Ne WIC website to find contact information for WIC programs across Ne; Click the “contact WIC near you” link located on the home page; enter a zip code to find WIC locations in that area 			

	Date Planned	Date Completed	Comments
<p>*WIC Appt Types - Discuss with LA Training Coordinator:</p> <ul style="list-style-type: none"> - How your clinic schedule is set up - How to you read the Journey appointment schedule - How to read the family panel - How to know when to schedule the next appointment - How to know what type of appointment to schedule ____ - Basic WIC Appointment Types in Journey - Review Procedure: Length of Certification Periods 			
<p>WIC Clinic Observations</p> <p>*Rights & Responsibilities</p>  <p>Observe clerk staff working with real WIC clients as they review Rights & Responsibilities at Certifications at the beginning of the visit:</p> <ul style="list-style-type: none"> o Review: Rights & responsibilities (detailed version) o Review: Rights & Responsibilities (summary) o Take note of how and when clients sign the signature pad for rights & responsibilities; how do staff explain what the client is signing? o Practice: New Clerk to practice reviewing rights & responsibilities with staff and or clients and be prepared to demonstrate this with real clients at training clinic o Bring your personal copies of the rights and responsibilities to training clinic to use 			Name the <u>staff</u> & <u>clinic</u> that was observed:
<p>*Answering Phone/Making Appts</p> <ul style="list-style-type: none"> - Observe how staff answers the phone at your clinic - Observe staff as they enter appointments into Journey - Observe how staff mark appointments as arrived or no show - Review WIC Procedure on Processing Standards to become familiar with "time frames for eligibility determination" 			Name the <u>staff</u> & <u>clinic</u> that was observed:
<p>*Collecting & Documenting Proof in Journey</p> <ul style="list-style-type: none"> o Observe clerical staff review & document proof of ID o Observe clerical staff review & document proof of residency o Observe clerical staff review & document proof of income o Review Proof Required at Certification Summary Sheet o Review WIC Procedures regarding proof required: o Review WIC Procedures regarding proof required: <ul style="list-style-type: none"> o Client/Guardian Identification o Income Determination & Documentation o Residency Eligibility & Documentation 			Name the <u>staff</u> & <u>clinic</u> that was observed:

	Date Planned	Date Completed	
<p> *WIC Clinic Observations – Continued</p> <p>All Appointment categories of WIC Clients (pregnant, BF, Not BF, child, infant)</p> <p>Discuss with your training coordinator the role of the Clerk in different types of appointments listed below and the panels in Journey that will be completed. Observe multiple appointments and different types of clients. When observing live clinic appointments, sit in a location close enough where you can see what staff are typing in the computer. If your clinic does not have enough real clients to observe, your LA training coordinator or WIC Director can schedule additional observations at other times or other clinic locations. Be sure to observe some appointments from <u>beginning to end</u> to get the big picture. At a minimum please observe:</p> <ul style="list-style-type: none"> - 3 Full Cert or Recerts (1 preg woman, 1 mom/baby, 1 child) - 3 Food Benefit List Explanation (using flip chart & brochures) - 3 Explain how to download and use WIC Shopper App - 2 Midcerts - 2 Nutrition ed - 1 Height/weight/hemoglobin check - 1 BF education 			Identify clinic names & dates observed

	Dated planned	Date Completed	Comments
<p>*Journey Navigational Videos</p> <p>eWIC introductory Video (4 min) Explaining eWIC to Clients – sample 13 min Basic Journey Terminology – Categories (4 min) Navigation Basics Video (4 minutes) Search for Families and Participants Video (7 min) Create a New Family & Schedule and Appts (10 min) Food Package Introduction (9 minutes) Breastfeeding Mom & Baby Pairs (14 min)</p> 			

	Dated planned	Date Completed	Comments
<p>*Computer practice / eWIC Journey Train LOGGING IN</p>  <p>To complete activities on Journey Train your new staff member needs their account set up. While we do not want you to share passwords, while waiting for trainee to get their own access to Journey Train, LA Training Coordinator may log in to Journey Train and demonstrate on her own account. She may help trainee work through these items on the Training Coordinators account.</p> <p>Training Coordinator help new staff practice the following:</p> <ul style="list-style-type: none"> ○ Logging in with their assigned user name and password into Journey Train; do not share logons ○ Logging in to your clinic 			
<p>* SEARCHING</p> <p>Training Coordinator help new staff practice several of the following:</p> <ul style="list-style-type: none"> ○ Simple search by family ID ○ Advanced search by name ○ Advanced search by date of birth ○ Advanced search by home phone ○ Wild card search ○ Soundex search 			
<p>* Making Family/Scheduling Apt/Moving appts</p> <p>Training Coordinator help new staff practice several of the following:</p> <ul style="list-style-type: none"> ○ Practice <u>making up 8-10 new families</u> in Journey Train & then <u>schedule</u> them for their first certification appointments. In your families include a variety such as: <ul style="list-style-type: none"> ○ 3 year old child ○ 1 year old child ○ 1 month old infant ○ 7 month old infant ○ pregnant woman ○ BF woman ○ Pregnant woman with a 2 year old ○ Schedule appointments for these new families in journey train – write down their family ID number in the comments column on this sheet and bring to training clinic ○ Practice moving appointments 			Record the family #'s that the trainee made and bring the numbers with you to training clinic
<p>*Confidentiality</p> <ul style="list-style-type: none"> ○ Discuss importance of client confidentiality with your WIC Director 			

Website Search Scavenger Hunt (Before or After Training Clinic)



Explore the Nebraska WIC Website: <https://dhhs.ne.gov/WIC>

Home Page

- Report WIC Fraud
- Contact WIC Near You ____

WIC Families Section – know the information on this webpage so you can refer families if needed

- Shopping with eWIC brochure
- using eWIC Card
- Setting eWIC Card pin
- and more....

Health Care Provider Section

- NE WIC Contract Formula Sheet
- Physician authorization forms: Infant Children Women
- Common food package cheat sheets (with pictures)

Local Agency Staff Section

- WIC Procedures & policy memos
- Expand Procedures in Functional Area 8, Certification, Eligibility & Coordination of Services and look through the procedures in this section. These relate to clerk duties.

- Under New Staff Training: Locate clerical job aids and resources
- Nutrition Education Materials (state provided)

Explore the Web:



Take a few minutes to see what you find when you search for WIC on the website. You might search for WIC in other states, or search for WIC videos on YouTube. Examples of what you might find:

[Arizona Training Videos on WIC Customer Service](#)

- Watch as time allows before and after you attend training clinic

*Clinic Materials & Supplies

- What brochures and materials does your clinic have on hand to give to new WIC clients or clients who want information about WIC?
- What brochures and materials does your clinic commonly provide to WIC clients for nutrition education and for referrals to other programs
- Review & become familiar with the content provided in these brochures and handouts
- Make a folder including 1 of each of these commonly used materials for your own reference
- Discuss clinic process for ordering WIC forms, food brochures, educational materials
- Office supplies
- Who is responsible for ordering / contact information

<p>*WIChealth.org (before training clinic)</p> <ul style="list-style-type: none"> o Email help@wichealth.org to request a staff account. Include your first and last name, email address, state, agency, and clinic. o Once you are able to sign in to your account, go to the Academy and complete: Watch: Welcome to wichealth Academy o Note: the links only work for people with an account 		
<p>WIChealth.org (after training clinic)</p> <p>Complete the following courses wichealth.org Academy within six months:</p> <ul style="list-style-type: none"> o Watch: Let's Take a Tour o Watch: Never Fear, the Help Desk is Here <p>Note: the links only work for people with an account</p>		
<p>Clinic Observations</p> <p>Scanning Documents into Journey</p>  <p>Discuss with training coordinator</p> <ul style="list-style-type: none"> - Who is responsible for scanning documents into Journey - What documents need to be scanned - How to scan documents in Journey - Describe the clerks role in handling PAF's 		
<p>WIC Store Visit (before or after training clinic)</p> <ul style="list-style-type: none"> o Visit a WIC Store with your LA Vendor Manager o Install the WIC shopper App on your phone - directions o Learn to use the WIC Shopper App to identify WIC foods o Observe a WIC purchase o Identify which WIC approved breads your store carries 		
<p>Foster Care (After training clinic)</p>  <ul style="list-style-type: none"> - Listen to the foster care webinar from 9.30.2020 - Complete Survey after watching the 9.30.2020 webinar - Listen to the Update on Kinship Placement-Moving Children from 2.26.21 - Listen to the Update on New Placement papers 2.26.21 		<p>Note this piece used to be taught during training clinic but has been moved to be completed at the home agency after the trainee attends training clinic.</p>
<p>*Training Coordinator Name & Contact</p> <p>Identify name/contact information of your Local Agency Training Coordinator responsible for helping new staff complete these activities</p>		

Please use the chart above to plan and record the new trainee's progress in completing the above items. Copies should be kept on file and available upon request. Starred items should all be completed prior to staff attending the training center. If the required items are not able to be completed prior to the scheduled session at the training center, please contact Jackie Johnson to request assistance in findings ways to help you help your staff complete these items. If during COVID, you need assistance setting up clinic observations for your staff over zoom, please contact Jackie Johnson. Also, here is a link to [Clerk Digital Handout Resource list](#); many of these will be reference during training clinic so please review prior to your training session be familiar with these resources. You may want to make photo copies of the ones that are most used by your new staff.

NAME OF TRAINING COORDINATOR/MENTOR COMPLETING THIS FORM:

DATE PRETRAINING WAS FINISHED:

Date Remaining Post-Training Items Finished: