

# Welcome to Streamlining WIC Certification

# Published Report [www.cbpp.org/wicstreamlining](http://www.cbpp.org/wicstreamlining)



820 First Street NE, Suite 510  
Washington, DC 20002

Tel: 202-408-1080  
Fax: 202-408-1056

center@cbpp.org  
www.cbpp.org

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January 6, 2017

## Modernizing and Streamlining WIC Eligibility Determination and Enrollment Processes

By Zoë Neuberger<sup>1</sup>

WIC — the Special Supplemental Nutrition Program for Women, Infants, and Children — serves *low-income pregnant and postpartum women, infants, and children up to age 5 who are at nutritional risk and plays a crucial role in improving their lifetime health. While WIC effectively and efficiently provides nutritious foods, nutrition education, breastfeeding support, and referrals to health care and social services to millions of families, there is room to modernize and simplify enrollment.*<sup>2</sup>

WIC is well-known for extensive research showing that participation improves the nutrition and health of low-income families — leading to healthier infants, more nutritious diets and better health care for children, and subsequently to higher academic achievement for students.<sup>3</sup> WIC is also extremely cost-effective.<sup>4</sup>

**Central District  
Health  
Department**

**Colorado  
WIC**

**Michigan  
WIC**

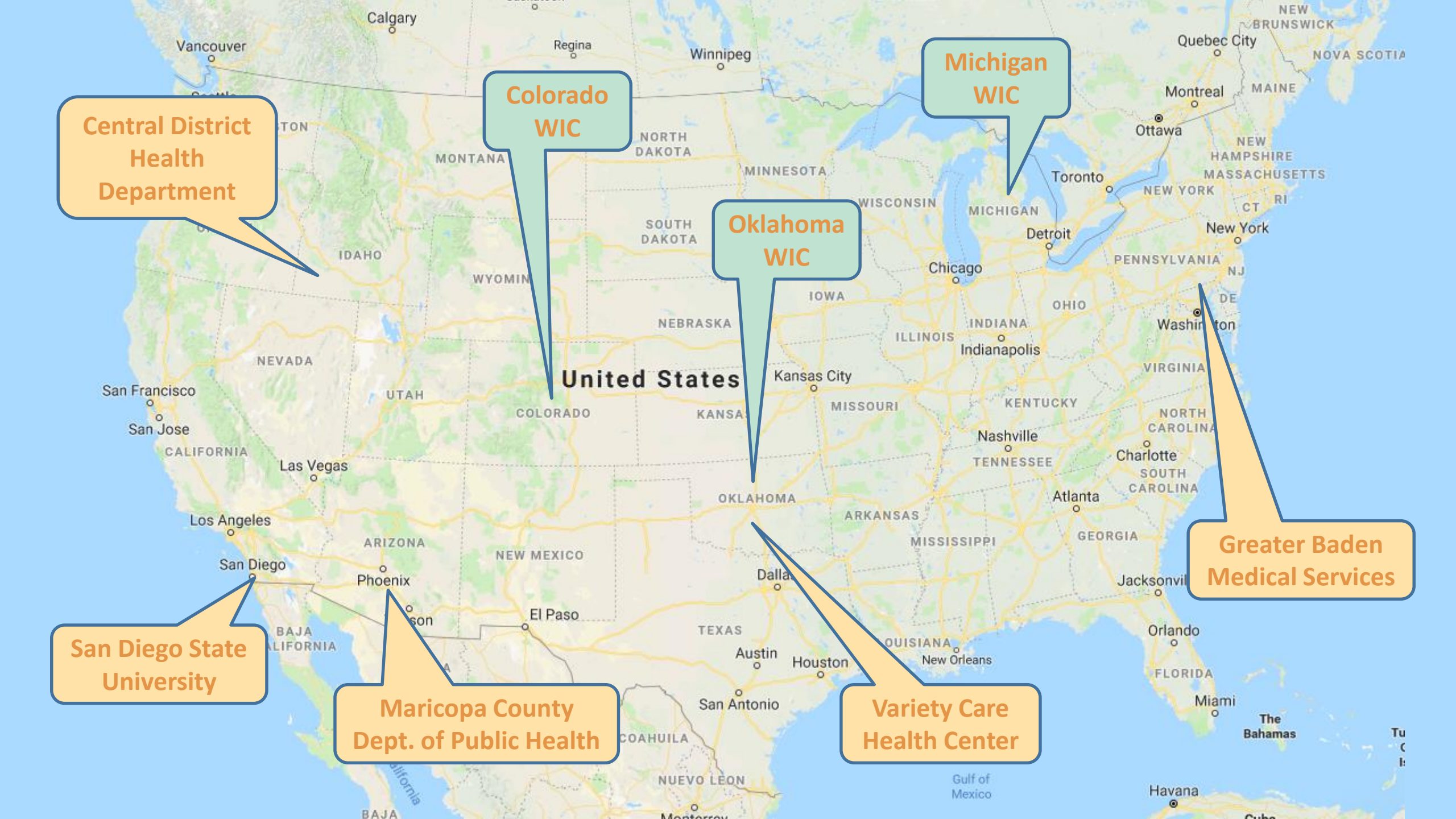
**Oklahoma  
WIC**

**San Diego State  
University**

**Maricopa County  
Dept. of Public Health**

**Variety Care  
Health Center**

**Greater Baden  
Medical Services**



# We asked the agencies to:

- Develop a plan
- Assess the impact
- Share lessons learned

# We provided:

- Technical assistance
- Opportunities for site visits
- Venues to share

# We did not provide:

- Funding

# Streamlining WIC Certification:

## Head Start Outreach/Referral Project

**Cathy Montgomery, Treta Whitehorn, Janet Newport, Christina Windrix, Sara Rozo, Emily Mueggenborg, Carrie Zeman, Terry Bryce**  
**Oklahoma State Department of Health – WIC Service**



# Oklahoma WIC

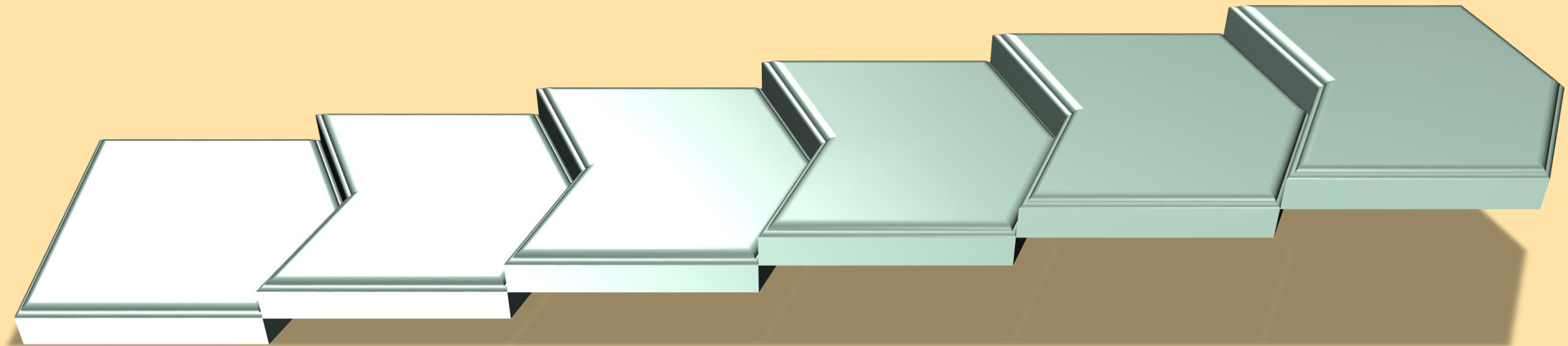
- 72,000 approximate state WIC caseload
- 10 WIC agencies – 9 Tribal and 1 State
- 110 county health departments and 26 independent contractors
- 2 major urban areas – many small town/rural areas
- 8 WIC Program Consultants in assigned areas across the state to assist clinic staff

# Program Development

- Multi-discipline committee
- Projects:
  - Head Start Outreach/Referral Project
  - Head Start-Tulsa
  - Streamlining Efforts in Clinic:
    - redesigned health assessment forms (single page)
    - allowing electronic 'proofs'
    - additional nutrition education option (self-paced)

# Project Strategies

**Goal:** Increase WIC caseload through partnership with Head Start



**USDA Regional  
Office input  
(MOU 1994,  
2017)**

**Meet with  
local Head  
Start agencies**

**Adapt State  
policy to include  
Head Start as  
income qualified**

**Create "Certificate  
of Participation"  
for Head Start  
enrollment**

**Design Pilot**

**Pilot Program**



# Head Start Outreach/Referral Project

- OK County HS Pilot
  - >40 HS programs & 2,450 children currently enrolled
- Distribute questionnaire at WIC certification to identify interest or participation in HS
- If “YES” provide VOC (HGB, ht, wt) at end of appointment
- Participant responsible for giving health data to HS
- Referral to HS documented
- Certificate of Participation accepted as proof of income plus referral from HS documented

# HEAD START CERTIFICATION OF ENROLLMENT

\_\_\_\_\_  
Name of Head Start Participant

\_\_\_\_\_  
Name and Address of Head Start

\_\_\_\_\_  
Telephone Number

\_\_\_\_\_  
Name and Title of Head Start Staff

\_\_\_\_\_  
Date



# Head Start Outreach/Referral Project

## Lessons Learned—Goals for the Future

- Timing is important!
  - Open enrollment period can reach the most participants but the time is limited (a few weeks in summer only)
  - Begin outreach efforts early
- Future goal to enhance documentation procedure
- Future goal to do statewide training of WIC staff on outreach, referral, and providing health data to participant for HS
- Continue to work with HS staff on referring participants to WIC



# Thank you!

Cathy Montgomery, MS, RD/LD

OSDH-WIC Service

[cathym@health.ok.gov](mailto:cathym@health.ok.gov) | 405-420-4678

# Streamlining WIC Certification: Preparing Potential Participants for WIC's Enrollment Process

**San Diego State University Research Foundation**



**WIC Program**



# Our Agency

28,250 certified participants

24,150 on average receive benefits monthly

Eleven sites throughout San Diego County

Four other local agencies also serve our county.

English 64.3%

Spanish 31.4%

Arabic 3%

25 other languages remaining 1.3%



# Improving Enrollment Experience

## Reflect:

On current enrollment process

## Act:

To prepare applicants for enrollment

- Manage expectations
- Facilitate success

Using two strategies:

1) mailing; 2) texting

## Evaluate:

What we have learned so far

**SAN DIEGO STATE UNIVERSITY**  
Research Foundation

**CALIFORNIA WIC**  
WOMEN, INFANTS & CHILDREN

**Your Enrollment Appointment**  
what you can expect . . .

**1st—We will verify WIC eligibility**  
*Remember to bring the items of proof or a picture of these items on your phone*

**2nd—You will participate in a nutrition assessment, including:**

- ◊ Height
- ◊ Weight

**3rd—We will discuss your nutrition questions and concerns**  
*To prepare, fill out any enclosed Nutrition Questionnaires*

**4th—You will receive WIC checks, and learn how to shop with them**

**We look forward to seeing you!**  
Call if you have questions  
1-888-999-6897  
[www.sdsuwic.org](http://www.sdsuwic.org)

*“Remember to bring the items of proof or a picture of these items on your phone”*

*“To prepare, fill out any enclosed Nutrition Questionnaires”*

# Closer Look at Mailing Strategy

- Know what to Expect
- Know what to Bring

**SAN DIEGO STATE UNIVERSITY**  
Research Foundation

**CALIFORNIA WIC**  
WOMEN, INFANTS & CHILDREN

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[www.sdsuwic.org](http://www.sdsuwic.org)



State of California—Health and Human Services Agency California Department of Public Health—WIC Program

### Pregnant Woman Nutrition Questionnaire

Name: \_\_\_\_\_ Age: \_\_\_\_\_ Due Date: \_\_\_\_\_

Please circle or write your answers to the following questions:

1. What is something that you do to be healthy? \_\_\_\_\_
2. What would you like to talk about today? \_\_\_\_\_

**Your Eating Habits**

3. How do you feel about how you are eating now? Good OK Not so good Other \_\_\_\_\_
4. How many meals do you eat each day? \_\_\_\_\_
5. How many times a week do you eat out or eat take-out food? 0 1 2 3 4 5 6 7 more

**Drinks and Foods**

6. What do you drink on **most days**? Water Milk Juice Soda Coffee Tea Flavored water  
Fruit drinks Kool-Aid or Punch Diet drinks Energy drinks Sports drinks Soy milk  
Wine Beer Alcohol Other \_\_\_\_\_
7. What do you eat on **most days**? Whole wheat bread Corn tortillas Whole wheat tortillas Brown rice  
Cold or hot cereal White bread Flour tortillas White rice Pasta/Noodles Crackers  
Vegetables (which?) \_\_\_\_\_ How many each day? \_\_\_\_\_  
Fruits (which?) \_\_\_\_\_ How many each day? \_\_\_\_\_  
Beef Pork Chicken Turkey Fish Eggs Beans Peanut butter Nuts Tofu  
Nonfat milk Lowfat milk Whole milk Flavored milk Cheese Yogurt Cottage cheese  
French fries Chips Hot dogs Deli meats Nuggets Desserts/sweets Other \_\_\_\_\_
8. Are you on a special diet? No Yes (please explain) \_\_\_\_\_

**Some Examples of Acceptable Proof** / **Algunos Ejemplos de Comprobantes que son Aceptados**

Below we have listed some common types of proof of identification, address, income, or pregnancy, but there may be other documents that are acceptable if you have any questions, please call us at 1-888-999-6897 so we can help you.

**Information about your upcoming WIC appointment**  
Información sobre su próxima cita de WIC

**WIC Appointment / Cita con WIC**

Date / Fecha: \_\_\_\_\_ 18  
Time / Hora: 08:10 AM  
Place / Lugar: CHULA VISTA WIC  
542 BROADWAY STE Q  
CHULA VISTA, CA 91910

**Bring the following / Favor de traer lo siguiente:**  
You can bring or show item(s) in electronic format (photo on cell phone or tablet; email attachment).  
Examples of acceptable proof listed on back of this page / Puede traer o mostrar éste de forma electrónica (fotografía en teléfono celular o tableta o correo electrónico). Ejemplos de comprobante aceptables en el otro lado de página

- Proof of Address / Comprobante de Domicilio
- Proof of Income / Comprobante de Ingreso(s)
- Medi-Cal card / Tarjeta de Medi-Cal
- Proof of Pregnancy / Comprobante de embarazo
- Identification / Identificación Janette
- WIC ID folder / Folder de Identificación de WIC
- Parent or Guardian must be present / Padre de Familia o Tutor legal debe estar presente
- Bring child to WIC appointment / Traiga a su niño(a) a la cita

**Pregnancy**

- Ultrasound with name
- Medical records stating pregnancy
- Written pregnancy verification letter from health care provider
- Medical referral form
- Prenatal blood work
- Participant's name and address
- Prenatal appointment card
- A letter demonstrating presumptive eligibility for prenatal Medi-Cal
- Prescription for prenatal vitamins

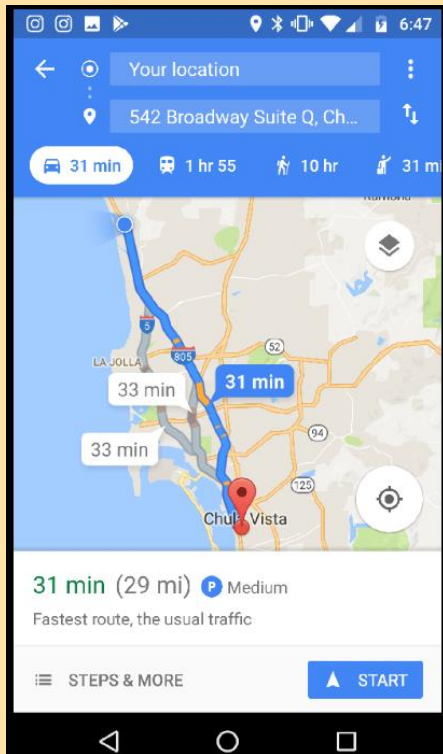
**Please Note:** Electronic versions, including photos, of any of the documents listed on this page are acceptable.

**Tome nota:** Versiones electrónicas, incluyendo fotografías, de cualquiera de los documentos en esta lista son aceptadas.



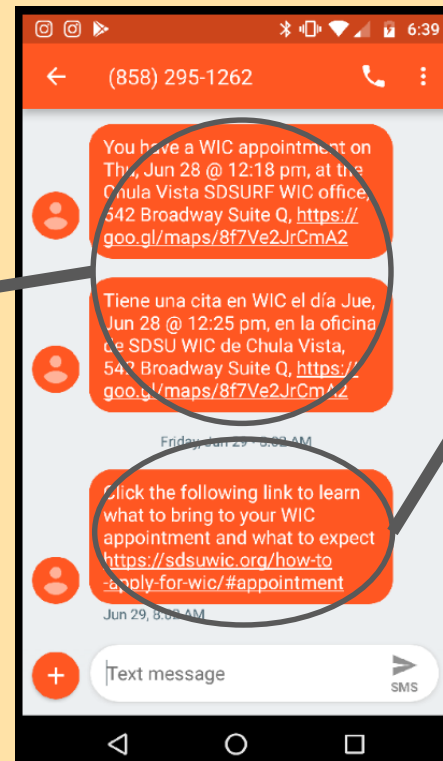
# Closer Look at Texting Strategy

3-Day Advance All Enrollment Appointments  
*(scheduled at the sites and through call center)*



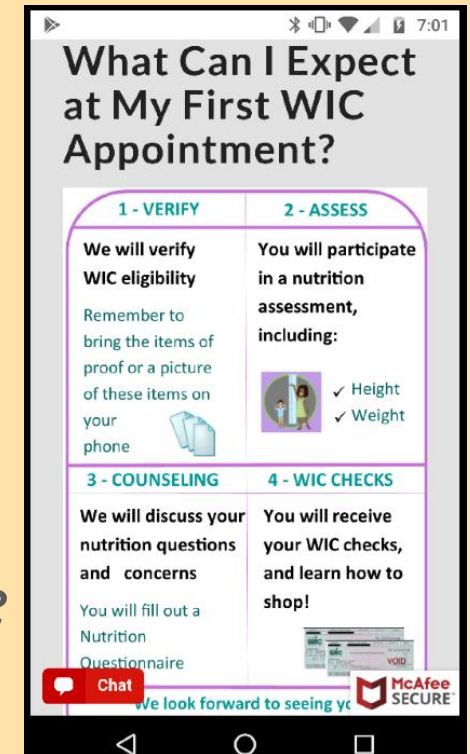
**Text 1**  
Date  
Time  
WIC Site  
Address

*link to map*



**Text 2**  
What to  
Expect  
& Bring

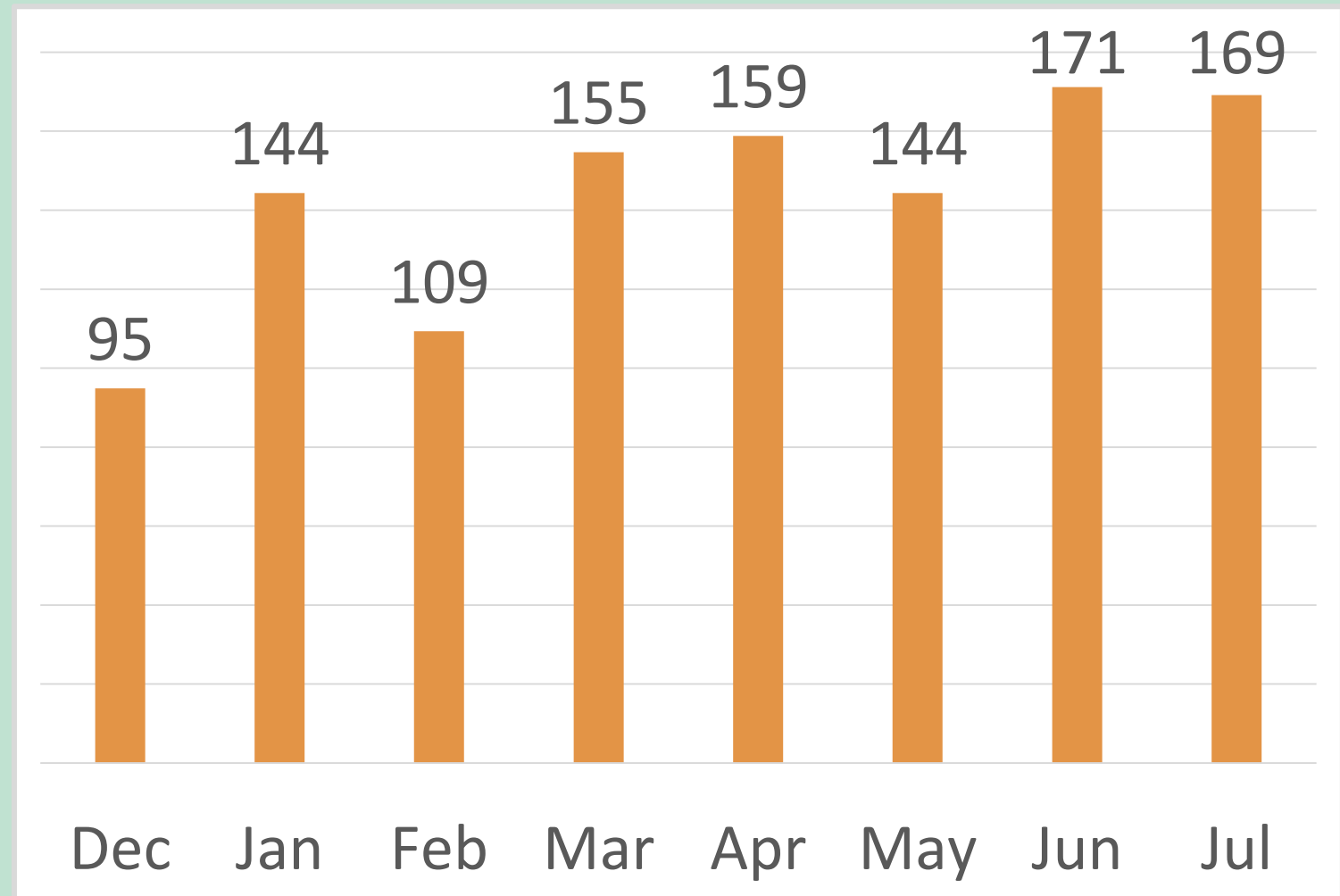
*link to website*



# Trends over Time

Newly Enrolled  
Families

*(Average  
Number per  
Month)*



# Trends over Time

*Among those  
who received mailings*

Begin mid-  
Nov

**Mailing**  
Nutrition  
Question-  
naires

“What to  
Expect”  
insert

Begin Feb

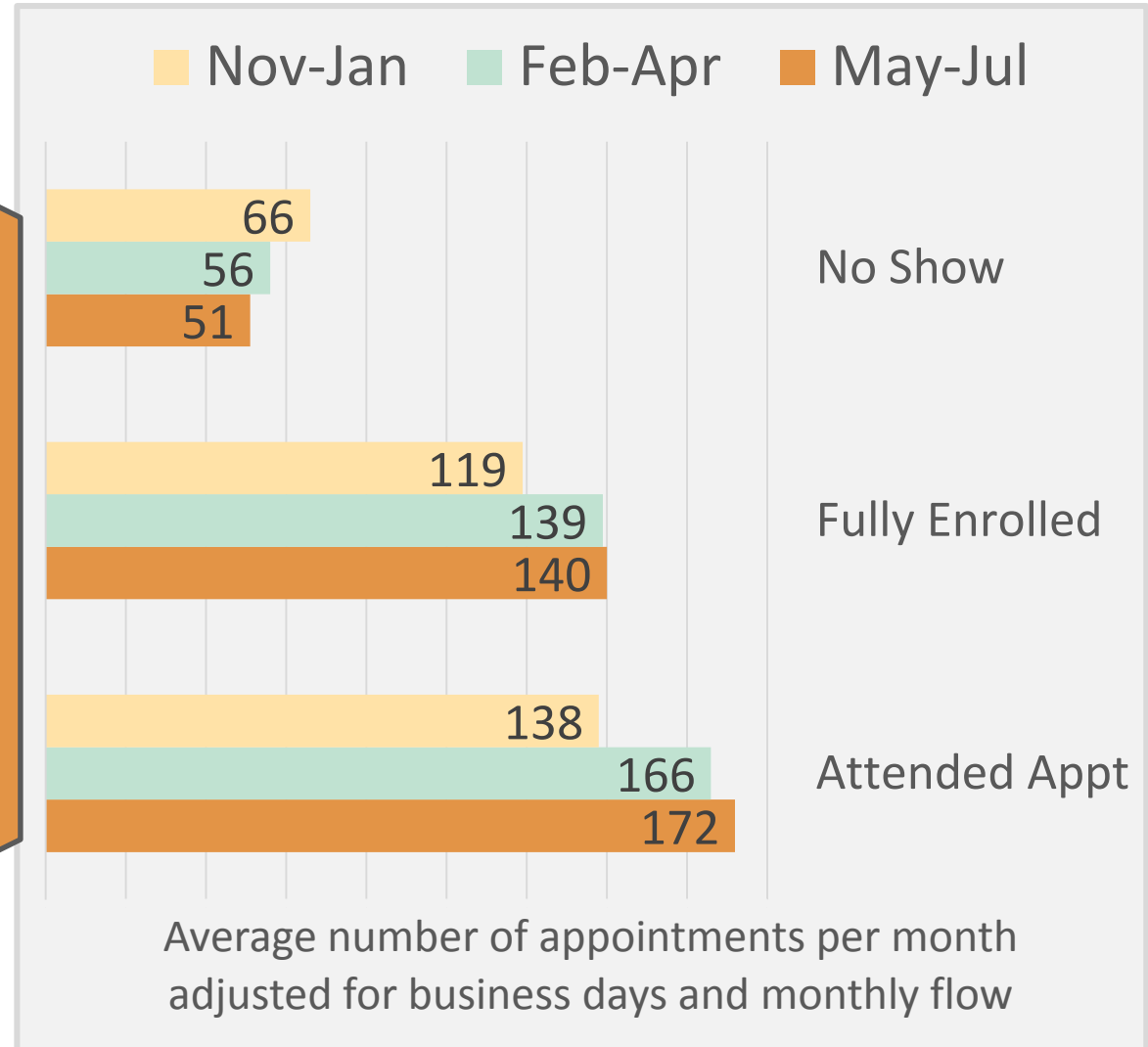
Using  
Revised  
**Mailing**  
Sheet  
“What to  
Bring”

Begin  
mid-June

3-Day  
Advance  
**Texts**

a) Appt.  
Reminder

b) Bring &  
Expect



# What we've learned so far . . .

- Electronic Documentation
  - Staff were well-informed on current CDPH/WIC Division policy
  - Survey Respondents (participants attending enrollment appt.):
    - 54% that received mailing knew
    - 37% that did not receive mailing knew
- Appointment Duration –those who received mailings report shorter duration compared to those who didn't receive mailings
- 67% of mailed Nutrition Questionnaires were brought to appointment
- Enrollment appointments scheduling: 53% call center; 47% at sites
- Interactive texting allowed more responsive scheduling



Thank you!



Kathleen M. Merchant, PhD

San Diego State University Research Foundation

WIC Program

[kmerchant@sdsu.edu](mailto:kmerchant@sdsu.edu)

# Streamlining WIC Certification:

Engaging Participants Using Technology

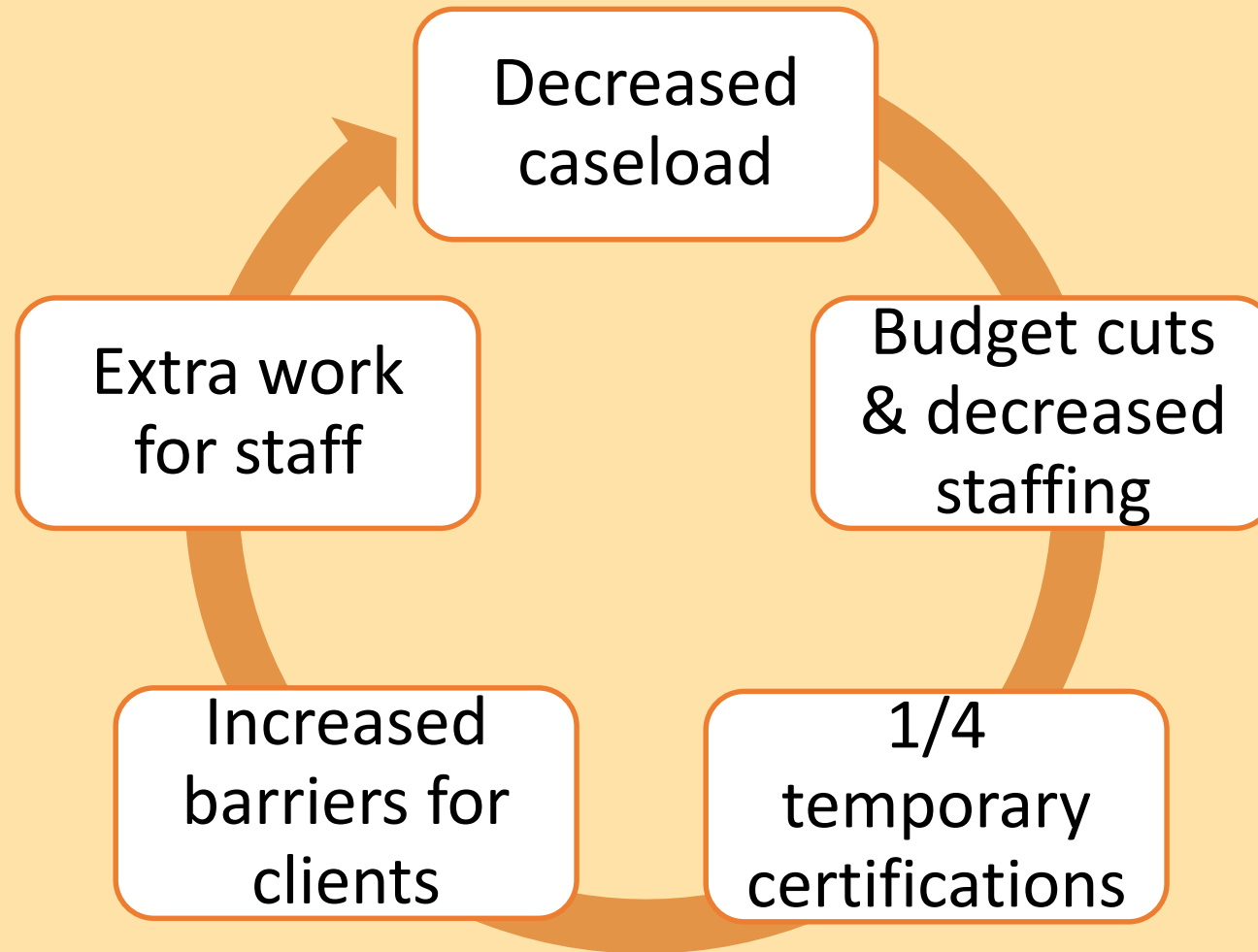
**Carrie Zavala, MS, RDN & Emily Roy, MS, RDN**  
**Maricopa County Department of Public Health**



# MCDPH – WIC Overview

- Caseload – 50,000 per month
- Primarily urban, Phoenix Metro Area
- 17 clinics across the County
- 120 staff
- Clinic Flow for Certifications
  - WIC Intake Specialists complete demographics and income verification and documentation
  - Nutritionists complete nutrition assessment, education, food package prescription and load eWIC benefits

# The Problem





# Key Project Goals

- 1. Improve options for participants to contact us for appointments and information**
- 2. Reduce the number of temporary 30-day certifications due to missing documentation**
- 3. Increase options to provide documentation through technology**

# Project Strategies

Online  
appointment  
request

Universal  
phone number

Obtaining  
documentation  
in clinic

Providing  
documentation  
out of clinic

# Online Appointment Request

- Click on “make a WIC Appointment”
- Complete form
- Form is sent to requested clinic
- Appointment made
- Client receives confirmation

The screenshot shows the Maricopa County WIC website's online appointment request form. The page header includes the Maricopa County logo and navigation links: "I Want to...", "Providers", "Schools", "Community", and "Individuals & Families". A "Select Language" dropdown is in the top right. The main content area is titled "Women, Infants & Children (WIC)" and features a photo of a woman with a baby. Below the photo, it says "Now Offering WIC@Home!" and provides details about home appointments. The form is divided into several sections: "Personal Information" (First Name, Last Name, Home Address, City, State, Zip Code, Date of Birth, Family ID, Phone), "Family Information" (Do you have children under the age of 5?, Are you pregnant?), and "Appointment Information" (Which clinic do you want to visit?, When would you like an appointment?). A sidebar on the left contains navigation links: Home, How Do I Apply for WIC?, Locations, FAQs, and En Español. A "WIC" logo is also present in the sidebar, with a green circle highlighting the "Make a WIC Appointment" button. A "Request WIC at Your Event" button is also visible. A Facebook link is located at the bottom of the sidebar. The "Contact Us" section for Women, Infants & Children (WIC) is at the bottom left.

Public Health > Individuals & Families > Family Health Promotion > Women, Infants & Children (WIC)

## Women, Infants & Children (WIC)

**What Does WIC Provide?**

- Breastfeeding support
- Healthy foods
- Nutrition information
- Referrals to health care and other:

**Who is WIC For?**

- Breastfeeding women
- Children (under age 5)
- Infants
- Postpartum women
- Pregnant women

**Now Offering WIC@Home!**

Families now have the option to attend some of their WIC appointments from the comfort of their homes. During a WIC@Home appointment, you'll join other parents or caregivers using a video-chat website to share tips on nutrition or breastfeeding. All you need is a smartphone, tablet or computer with a webcam to participate.

Ask us about **WIC@Home** at your next appointment!

**Personal Information**

First Name\*

Last Name\*

Home Address\*

City\*

State\*

Zip Code\*

Date of Birth\*

Family ID (if known)

Phone\*  This is a required field.

My mailing address is the same as my home address.\*

Yes

No

**Family Information**

Do you have children under the age of 5?\*

Yes

No

Are you pregnant?\*

Yes

No

**Appointment Information**

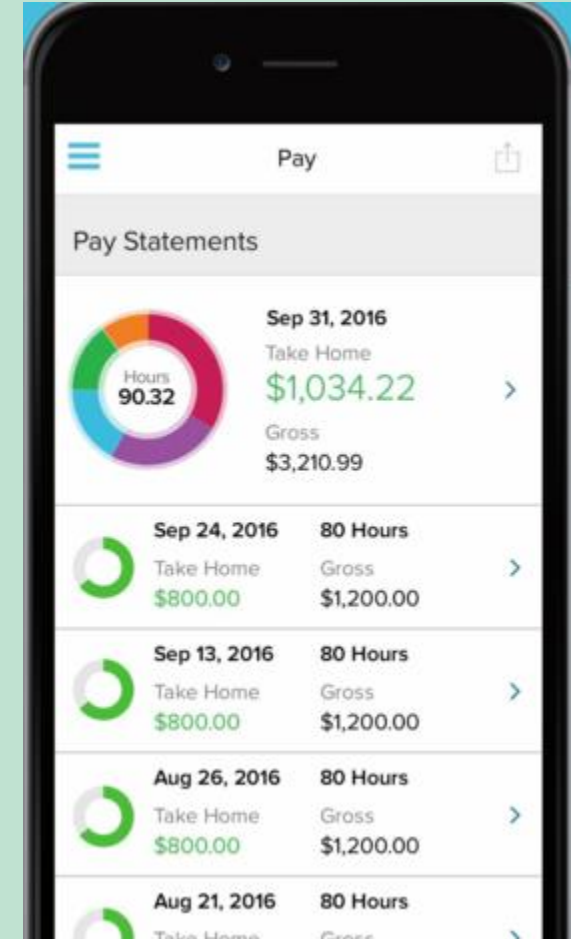
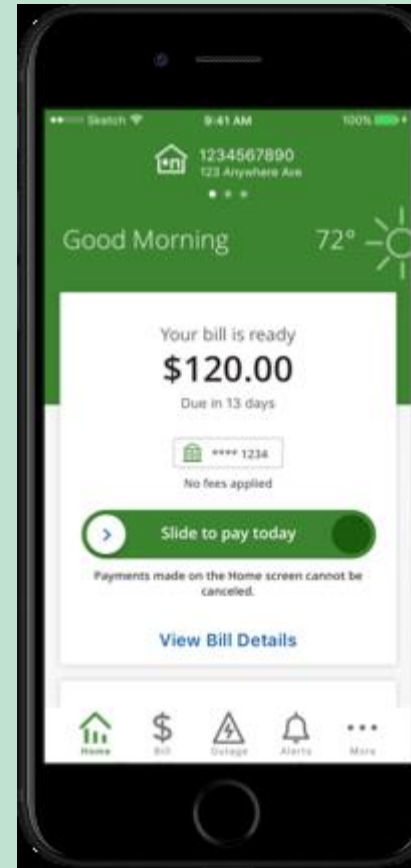
Which clinic do you want to visit?\*

-- Select One --

When would you like an appointment?\*

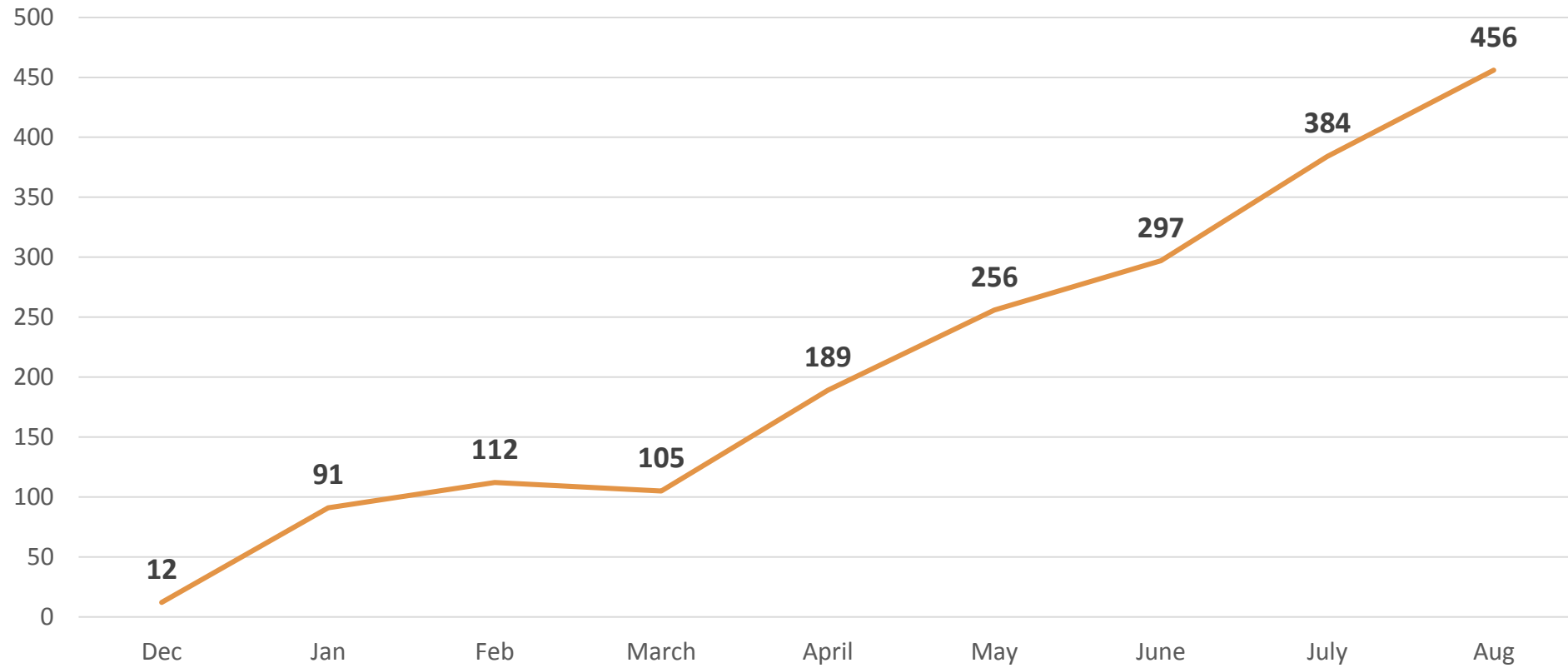
# Obtaining Documentation in Clinic

- Policies & procedures updated
- Staff training and input
- Cheat Sheet created



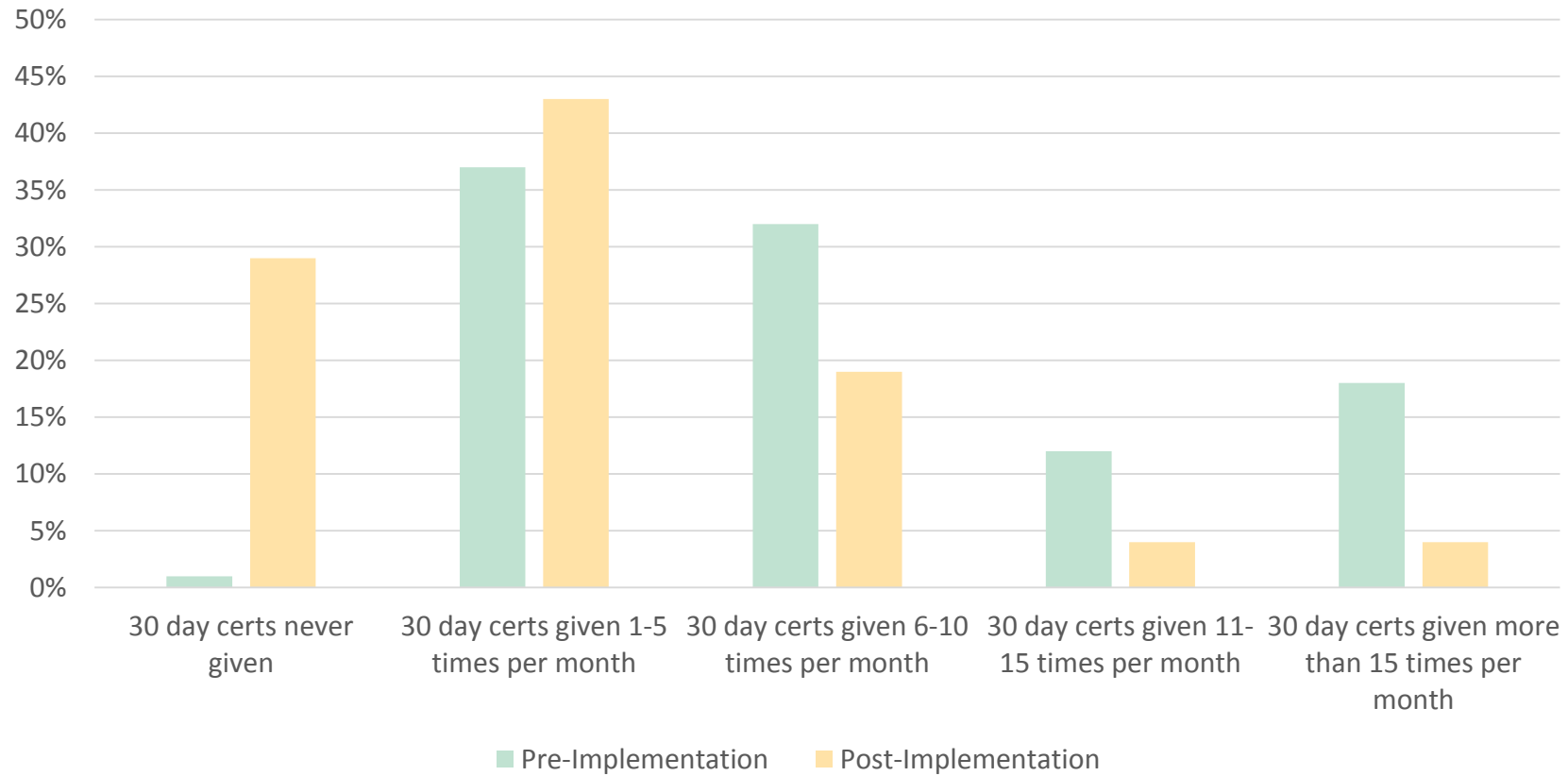
# Results

Online Appointment Requests by Month



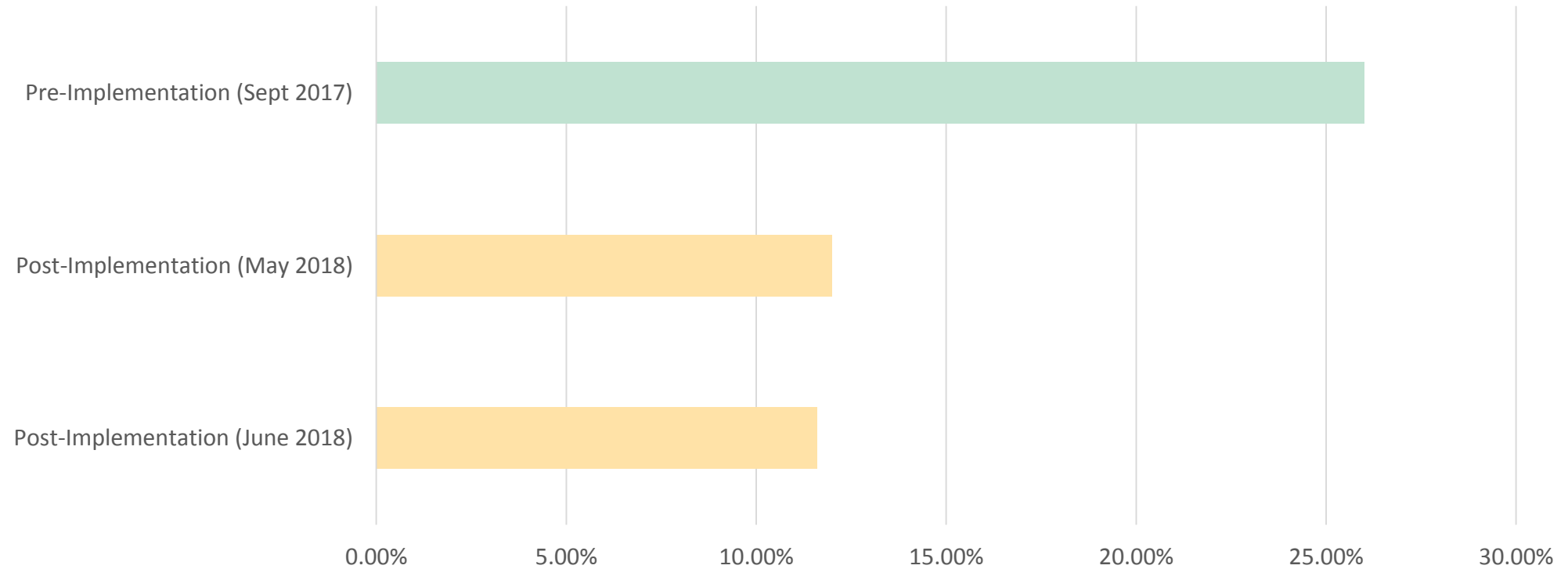
# Results

Staff Perception of Utilizing Technology to Reduce 30-day Temporary Certifications



# Results

Percent of Total Certifications that were 30-day Temporary Certifications due to lack of Documentation



# Lessons Learned and Next Steps

## Lessons Learned



Online Request  
Use of Phone  
Partnerships

Universal Number  
Use of Computer  
Caseload

## Next Steps







# Thank you!

Carrie Zavala, MS, RDN

WIC Director

Maricopa County Department of Public Health

[Carrie.Zavala@Maricopa.gov](mailto:Carrie.Zavala@Maricopa.gov)

# Streamlining WIC Certification:

Accessing Medicaid portal to verify status of WIC applicants  
prior to certification process

**Angela Spain, RDN, LD**

**Central District Health Department | Boise, Idaho**



[cdhd.idaho.gov](http://cdhd.idaho.gov)

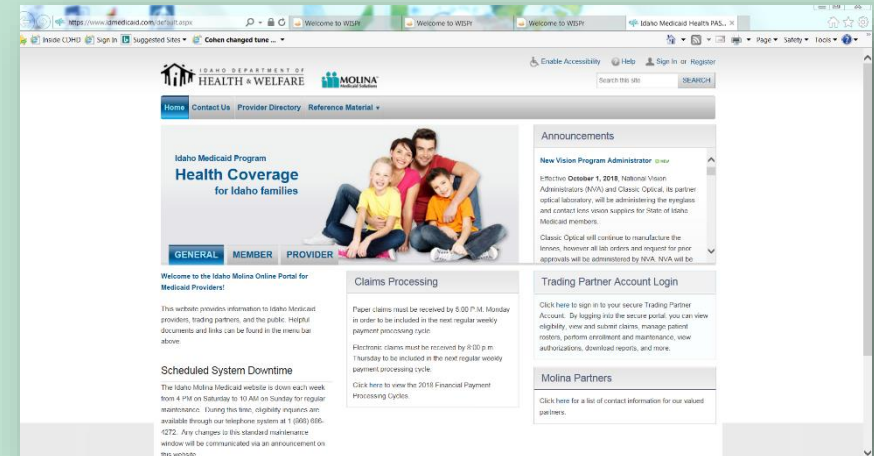
# CDHD – WIC Overview

- Caseload – 5,500 per month
- 14 clinic sites in 4 counties
- 80% enrolled in Medicaid
- Clinic Flow for Certifications
  - A Customer Service Representative (CSR) collects demographic information and documents income and residence eligibility
  - A Clinical Assistant (CA) then conducts the nutrition assessment and completes the certification

# Project Goals



- Streamline process for Medicaid documentation
  - Eliminate need to call State WIC “Help Desk”
  - Reduce client wait time
  - Improved customer service
- Allow CSRs to access Idaho Medicaid Portal



# Project Outcomes

Obtain  
access to  
Medicaid  
Portal



Train CSR  
staff to use  
Medicaid Portal



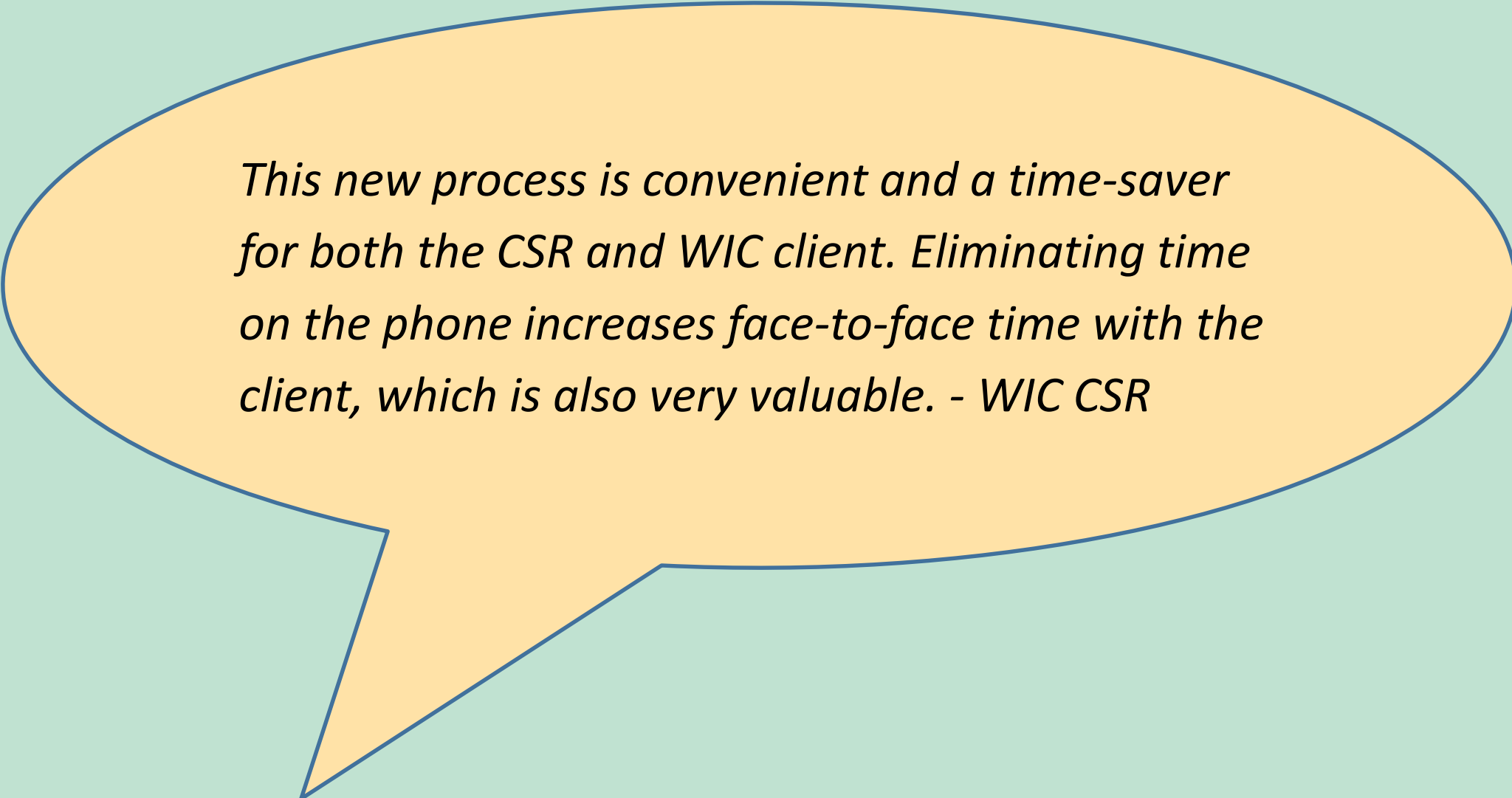
Reduce  
time during  
certification

5

MINUTE  
WAIT TIME

1

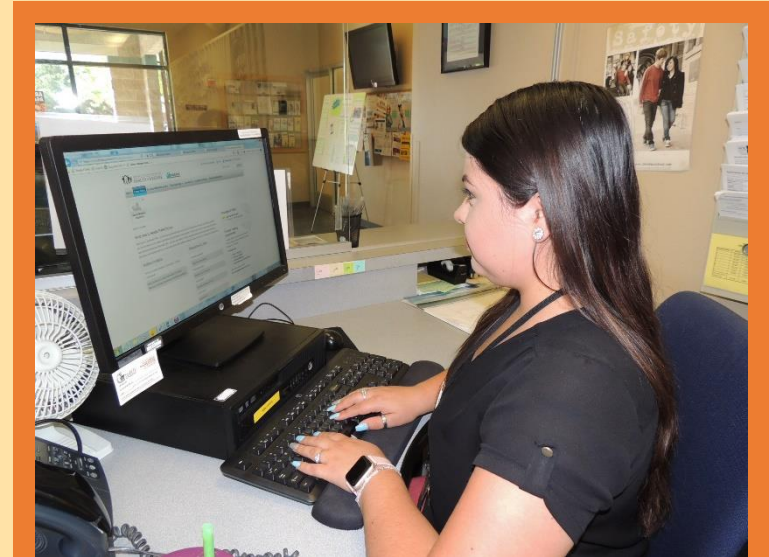
MINUTE  
WAIT TIME



*This new process is convenient and a time-saver for both the CSR and WIC client. Eliminating time on the phone increases face-to-face time with the client, which is also very valuable. - WIC CSR*

# Lessons Learned

- Getting authorization to Portal easier than anticipated
- Staff quickly overcame hesitancy with change
- Idaho State WIC appreciates call reduction
- Change ensures names & DOBs consistent between Medicaid and WIC
  - Allows for easier & more accurate billing to Medicaid for dietitian visits
- Participants appreciate reduced wait time & improved customer service





# Thank you!

**Angela Spain, RDN, LD**

**Central District Health Department | Boise, Idaho**

[aspain@cdhd.idaho.gov](mailto:aspain@cdhd.idaho.gov) | 208-327-8545

cdhd.idaho.gov



# Streamlining WIC Certification:

Participant Survey

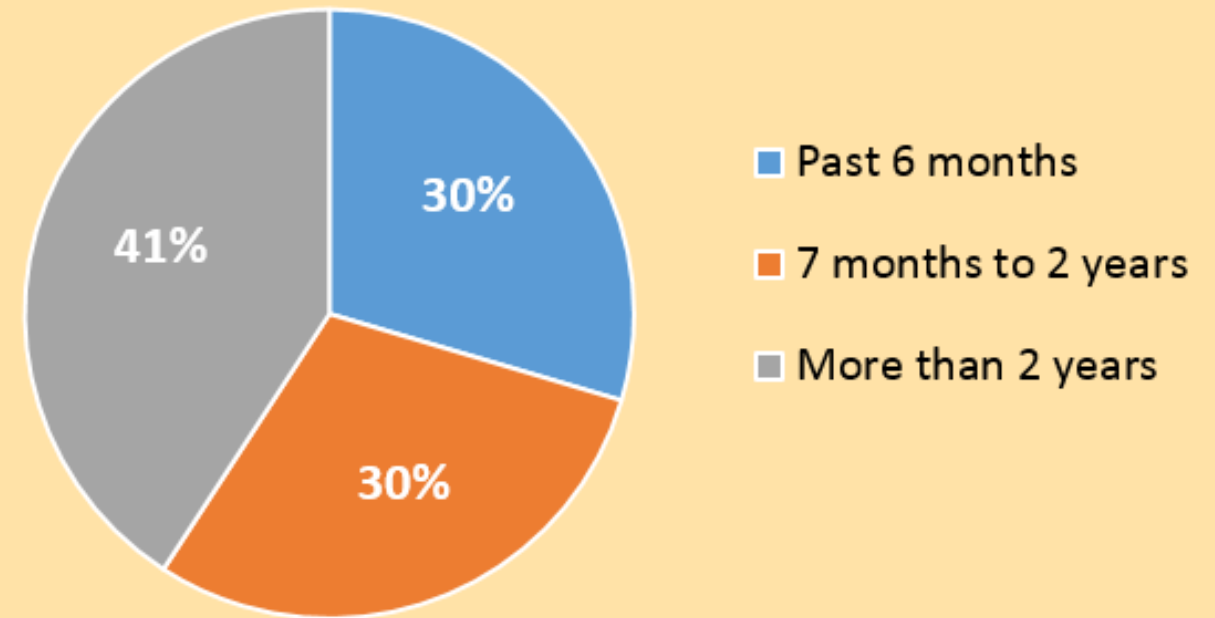
**Linnea Sallack, MPH, RD | Altarum**



# Participant Survey Respondents

- Participants/parents whose most recent WIC visit included certification
- Conducted in 7 project agencies during June/July
- 408 responses

- Length of WIC Participation



# Participant Satisfaction: High

>90% Rated 4 or 5 Stars

- Days open
- Times open
- Making WIC appointment
- Providing income proof
- Providing address proof
- Providing ID
- Process to apply/continue
- Customer service
- Helpfulness of WIC staff



# Participant Satisfaction: Lower

<90% Rated 4 or 5 Stars

- Appearance of WIC Site
- Location of WIC Site



# Length of WIC appointment?

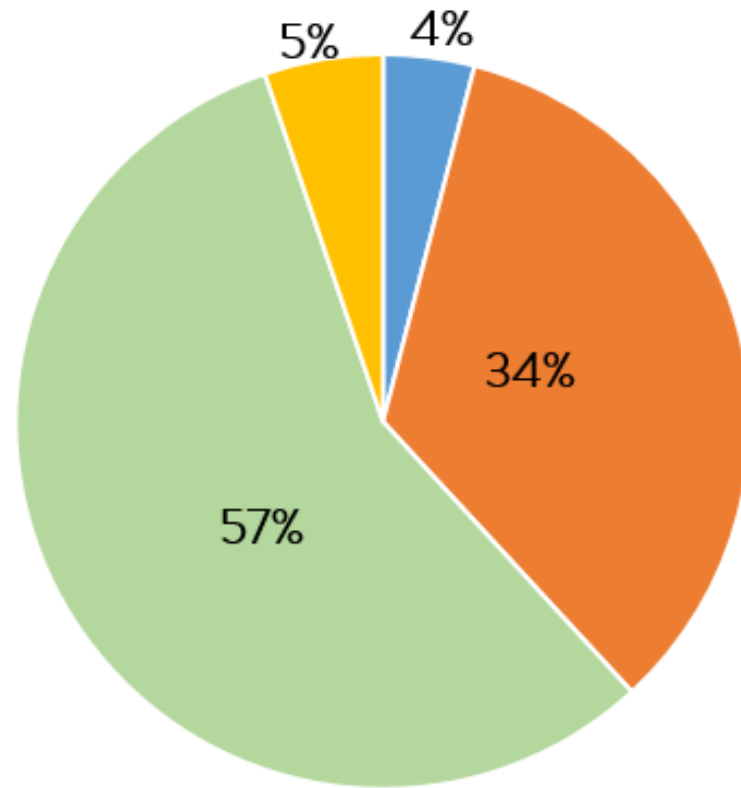


Median total  
time = 45  
minutes

Median time to  
provide proof of  
income, address,  
ID = 5 minutes

n=400

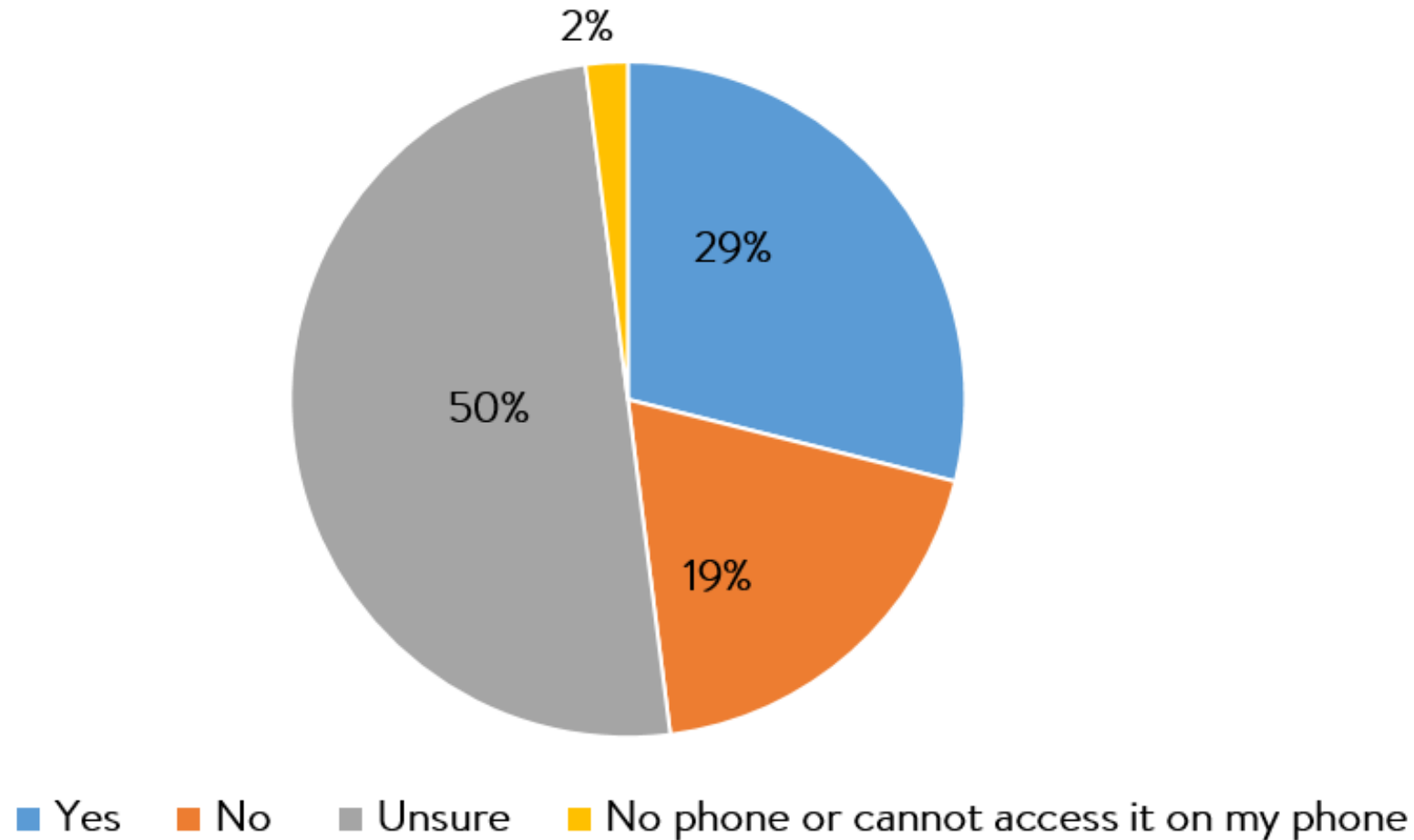
# How did length compare to past?



■ Longer ■ Shorter ■ About the same ■ Unsure

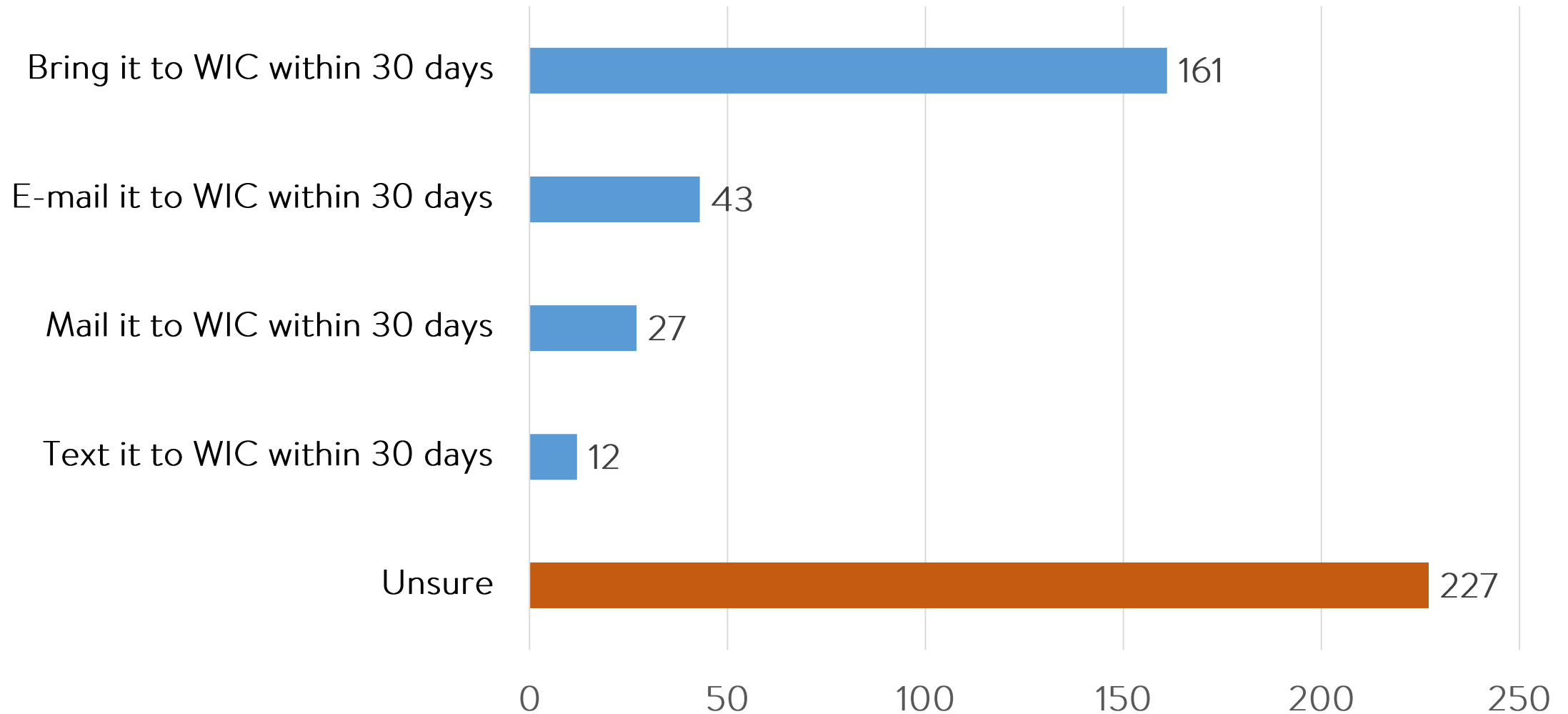
n=249 Question asked for participants >6 months on WIC

# Allowed to show proofs on phone?



n=398

# Options if missing proofs?



n=398 Respondents could select multiple options.





Thank you!

Linnea Sallack  
Altarum Institute  
[Linnea.sallack@Altarum.org](mailto:Linnea.sallack@Altarum.org)

# Questions & Answers

**Thank you for attending  
Streamlining WIC Certification**