

WIC COORDINATOR TRAINING PLAN

Competencies, Objectives, and Action Steps for Core Training Areas

1. WIC Program Overview – Understands and is able to explain the WIC Program

# 1.	Competencies/Objectives	Action steps	Notes
1.1	Correctly describes WIC to a potential participant.	Complete Introduction to WIC Module	
1.2	Directs participants through the clinic flow.	Observe clinic flow	
1.3	Correctly explains a WIC participants' rights and responsibilities	Observe check-in procedure Review Policy 480, 610 to 616, 635, 655, 657	
1.4	Correctly screens participants for eligibility.	Observe certification process Review Policy 451, 625, 626, 628, 645, 670, 675	
1.5	Correctly issues benefits to participants.	Observe benefit issuance Review Policy 511	
1.6	Educates WIC shoppers on the correct use of eWIC card.	Observe shopper education	

2. Caseload Management – Understands caseload management principles and strategies for maintaining the local agency's WIC participant caseload at targeted levels.

# 2.	Competencies/Objectives	Action steps	Notes
2.1	Maintain caseload at 97-103% of state assigned levels.	Review Policy 325 Complete online course: Introduction to Caseload Review CLHO Funding formula Identify monthly process for monitoring and managing caseload.	
2.1.1	Use TWIST Caseload Reports:	Review YouTube: How to Run Caseload Reports Review the following reports in TWIST: • Participating Caseload • Certified Caseload	

# 2.	Competencies/Objectives	Action steps	Notes
		• % Difference between Participating and Certified Caseload • % Assigned Caseload History	
2.1.2	Monitor clinic characteristics that impact caseload.		
	• Monitor show rate reports	Review Show Rate reports in TWIST	
	• Assure timely and effective client appointment notification	Identify local agency procedures for notifying participants about their appointments. Review ANSWR System.	
	• Assure delivery of excellent customer service for retention of participants	Complete Participant Centered Services (PCS): Setting the Stage Observe clinic activities for delivery of participant centered customer service	
	• Assure program accessibility (hours of operation, location of clinic sites, phone access)	Identify clinic hours of operation including lunch, evening and Saturday times; location of clinic sites including satellite clinics and hours of operation; phone hours including availability of operators, voice mail and number of phone lines.	
2.1.3	Assure adequate appointment availability	Identify staff responsible for appointment scheduling.	
	• Utilize auto scheduler for efficient appointment scheduling	Refer to TWIST Training Manual, Chapter 4 Determine timing for routine scheduling	
	• Schedule appropriate number of staff to meet program needs	Review staffing patterns	
	• Maintain effective appointment templates	Review appointment templates including length and variety of appointments	
	• Monitor clinic schedules	Review availability of specific appointments in TWIST such as	

# 2.	Competencies/Objectives	Action steps	Notes
		individual and group nutrition education and high risk appointments with the RDN	
	Appointment Scheduler Reports	Review appointment scheduler reports in TWIST	
2.1.4	Meet processing standards for applicant categories or have a temporary extension approved by the state WIC program.	Review Policy 605	
2.1.5	Assure benefits are issued according to policy and that the appropriate food package assignment and shopper education occurs.	Review Policy 769 and 511 Complete Food Package Module	
2.1.6	Assure correct use of waiting lists	Review Policy 475 Contact State nutrition consultant if considering use of a waiting list	
2.2	Ensures program outreach to potential clients is performed and documented		
2.2.1	Develop annual outreach plan. Conduct and document annual outreach activities including annual media requirement and sustainable outreach activities.	Review Policy 470 Review local agency outreach log	

3. Local agency staff – Assures that the local agency has the appropriate well-trained staff.

# 3.	Competencies/Objectives	Action Steps	Notes
3.1	Assures agency is appropriately staffed to provide WIC services.	Review Policy 435	
3.1.1	Hire and train appropriate staff to meet program needs, including an appropriate number of certifiers, clerical staff and registered dietitian(s)/WIC Nutritionists to meet caseload needs.	Review Policy 661 and 435 Identify number of FTE's for each position/role in local agency Review personnel summary	
	Bilingual staff or interpreters are available to meet language needs of clients.	Review Racial Ethnic report and Non English spoken language report in TWIST Identify bilingual staff	

# 3.	Competencies/Objectives	Action Steps	Notes
	Registered dietitian nutritionist (RDN)/WIC Nutritionists to see all high risk clients and clients on special formulas for development of a nutrition care plan.	Review Policy 661 Identify and meet with local agency RDN	
	Breastfeeding Coordinator to coordinate agency's breastfeeding promotion and support activities.	Review Policy 710 Identify and meet with local agency breastfeeding coordinator	
	Breast Pump Coordinator who oversees the breast pumps, including ordering, tracking and complying with program requirements..	Review Policy 712 Identify and meet with the local agency breast pump coordinator.	
	A qualified staff person identified as the training supervisor who must be actively involved in training staff.	Review Policy 440 Identify and meet with local agency training supervisor	
	Breastfeeding Peer Counselor Coordinator agency's breastfeeding peer counselor program (if applicable)	Review Policy 716 Identify and meet with local agency breastfeeding peer counselor coordinator.	
3.2	Ensures staff receive appropriate training and meet job related competencies.	Review Policy 440 Review local agency annual training schedule	
	Assure onboarding activities are completed for new staff and exiting activities for staff no longer with WIC.	Onboarding and exiting checklists on WIC Coordinator page of website.	
3.2.1	Assure all CPAs complete the required training modules within the appropriate time frame.	Review Policy 440 and 660 Refer to CPA Competency Model (660, Appendix A) Review Certifier's Guide	
3.2.2	Assure all clerical staff complete the required training modules within the appropriate time frame.	Review Policy 440	
3.2.3	Assure all staff are trained on task appropriate breastfeeding promotion and support.	Review Policy 710 and 440 Complete Breastfeeding Module	

# 3.	Competencies/Objectives	Action Steps	Notes
3.2.4	Assure all staff providing group nutrition education classes complete the required training modules prior to teaching.	Policy 440 and 810 Refer to Group Nutrition Education Training Module	
3.2.5	Assure all staff complete TWIST training.	Refer to TWIST Training Manual Consider attendance at state CPA or Clerical TWIST Training	
3.2.6	Assure staff who perform immunization screening and referrals complete appropriate training.	Review Policy 481	
3.2.7	Assure that paraprofessional certifiers receive quarterly in-services.	Review Policy 660 Review current NE Plan for identified in-services.	
3.2.8	Assure all staff receive annual civil rights training and new staff receive civil rights training within 30 days of hire.	Review Policy 452 Complete Civil Rights Training within 30 days of hire	
3.2.9	Assure all staff receive training needed to address new processes and procedures or to provide information needed to correctly perform their job.	Attend State WIC Conferences Attend OWCA meetings Utilize state produced in-service packets and materials Identify training strategies used in past.	
3.2.10	Document all training completed by staff. - Document module completion in TWIST - Document Civil rights training, quarterly in-services, and other training completed, manually.	Review local agency training log Review Module Completed /Uncompleted report in TWIST	
3.3	Assure all staff working in WIC complete the Adverse Childhood Experiences (ACEs) online course.	Complete Adverse Childhood Experiences (ACEs) online course.	

4. Nutrition Education – Understands the importance of providing quality Nutrition Education

# 4.	Competencies/Objectives	Action Steps	Notes
4.1	Assure agency actively and effectively supports breastfeeding.	Review Policy 710	
4.1.1	Maintain a clinic environment that endorses breastfeeding as the preferred method of infant feeding.	Review Policy 710 Observe clinic environment for	

# 4.	Competencies/Objectives	Action Steps	Notes
		breastfeeding friendly characteristics	
4.1.2	Promote breastfeeding to all pregnant women and their families.	Review Policy 710 Observe prenatal certifications	
4.1.3	Ensure women have access to breastfeeding promotion and support activities during prenatal and postpartum periods.	Review Policy 710 Observe breastfeeding classes or other breastfeeding education Observe breast pump issuance	
4.1.4	Refer clients to certifiers or breastfeeding coordinator for consultation when a breastfeeding client requests formula.	Review Policy 710 Observe breastfeeding consultation Consult with staff regarding breastfeeding referrals to community resources	
4.2	Assures quality nutrition education is offered to all WIC participants.	Complete Marketing NE Module	
4.2.1	Assure minimum orientation to the program is provided for each participant including shopper education	Review Policy 635 Observe certifications Review shopper education materials	
4.2.2	Assure appropriate nutrition education is offered at each certification appointment addresses needs and interests of each participant through participant centered counseling.	Policy 810 Refer to WIC Participant Centered Education (PCE) online training module Observe certifications	
4.2.3	Assure adequate and appropriate quarterly nutrition education opportunities for all participants, including group classes, individual nutrition education, follow-up appointments, and high risk visits with the registered dietitian.	Review Policy 810 and 820 Observe individual quarterly nutrition education appointments Observe group education	
4.2.4	Oversee scheduling of nutrition education appointments.	Refer to TWIST Training Manual, Chapter 4	
	Nutrition education opportunities address needs and interests of all participant categories.	Review Policy 820	
	Provide nutrition education in languages needed by participants.	Review Policy 820	

# 4.	Competencies/Objectives	Action Steps	Notes
	For all non-WIC quarterly nutrition education contacts, assure a written agreement between WIC and the agency providing the nutrition education is on file.	Review Policy 810 and 830 Identify existing agreements for non-WIC nutrition education, if any	
4.2.5	Assure lesson plans are developed and used for each class.	Review Policy 820 Review agency's lesson plans	
4.2.6	Assure high risk participants are referred to an RDN.	Review Policy 661 and Policy 830 Review agency high risk referral policy. Observe a high risk appointment	
4.3	Ensures the annual nutrition services plan is completed.	Review Policy 850	
4.3.1	Ensures development and implementation of the nutrition services plan for the upcoming FFY.	Review current year's Nutrition Services Plan	
4.3.2	Ensures evaluation of the nutrition services plan for the current FFY.	Review evaluation of the previous year's Nutrition Services Plan	

5. Program Integrity – Demonstrates personal accountability and ensures that program policies and procedures are followed.

# 5.	Competencies/Objectives	Action Steps	Notes
5.1	Balances multiple responsibilities between nutrition assessment, nutrition education, data entry, and benefit issuance (e.g. shopper education).	Refer to your agency's business standards	
5.2	Practices positive work ethics to ensure program integrity (honesty, integrity)	Refer to your agency's business standards	
5.3	Participates actively in staff development/training.	Refer to your agency's business standards	
5.4	Uses technology and program equipment/materials in an appropriate and safe manner for work purposes only.	Refer to your agency's business standards	
5.5	Performs duties within the context of written policies of the agency where employed, Oregon State policy and USDA regulations	Refer to your agency's business standards	

# 5.	Competencies/Objectives	Action Steps	Notes
5.6	Complies with the provisions of Civil Rights laws, regulations and policies	Refer to your agency's business standards	
5.7	Ensure staff and local agency procedures protect client civil rights.	Review Policy 452	
5.7.1	Include non-discrimination statement on outreach materials included pamphlets, newspaper ads, TV or radio spots.	Review Policy 452 Determine whether local agency outreach materials are developed locally or by the state Review locally produced materials for nondiscrimination statement	
5.7.2	Post non-discrimination statement (USDA Justice for All poster) and Moving notification poster in areas frequented by participants and in each clinic	Review Policy 452 and Policy 650 Identify poster locations at each clinic site	
5.7.3	Provide clinic access to people with disabilities under the Americans with Disabilities Act.	Assess clinic physical setting for wheelchair access and child safety	
5.7.4	Assure that forms and materials are available in languages for the population groups served.	Identify major language group served by the local agency	
5.7.5	Contact your civil rights representative at the state WIC office immediately if you have a civil rights complaint.	Review Policy 588	
5.8	Effectively manage WIC program assets.		
5.8.1	Coordinate Quarterly Time Studies and submit to state by deadline.	Review Policy 316 Review recent local agency time studies	
	20% of the local agency administrative grant must be spent on nutrition education and a specified amount on breastfeeding (based on grant amount).	Review recent local agency time studies	
5.8.2	Assure orders are properly placed and required documentation is sent to the State when local agency has received eWIC cards, HemoCue supplies, and breast pumps.	Review Policy 501 and Policy 712 Identify local agency procedures for ordering Consult with staff responsible for placing orders and submitting documentation to the state.	
5.8.3	Assure that eWIC cards are kept in locked storage during non-use times.	Review Policy 501 Identify location of secure storage for listed items	

# 5.	Competencies/Objectives	Action Steps	Notes
5.8.4	Assure an inventory of eWIC cards is conducted at least monthly.	Review Policy 501 Review recent local agency eWIC card inventory	
5.8.5	Review separation of duties audit every two weeks.	Review Policy 595 Review recent local agency separation of duties audits	
5.8.6	Assure that benefit replacement occurs only under limited circumstances.	Review Policy 561 Observe a formula replacement procedure	
5.8.7	Assure that breast pumps are issued appropriately with correct documentation; that they are kept secure, adequately tracked and appropriately cleaned and maintained	Refer to TWIST Training Manual, Chapter 8 Review Policies 712 Identify location of secure storage Observe breast pump issuance and cleaning	
5.8.8	Assure that the forms listed below are retained according to the state retention policy:	Review Policy 426 Identify location for retention Consult with staff responsible for maintaining retained forms	
	• participant signature forms	Review Policy 635	
	• Medical Documentation forms	Review Policy 765	
	• No Proof Form	Review Policy 610	
5.8.9	Assure appropriate issuance of formula.		
	• Assure clinic process is in place for review and storage of medical documentation forms.	Review Policy 765	
	• Assure agency secures returned formula and has a process for tracking and managing	Review Policy 735 Identify location of formula storage Consult staff responsible for managing returned formula.	
	• Staff follow appropriate procedures for issuing special medical formulas.	Review Policy 760 and Policy 733 Determine local agency's use of the Formula Warehouse for delivery of special medical formulas. Consult with staff responsible for ordering	

# 5.	Competencies/Objectives	Action Steps	Notes
		and tracking formulas through the Formula Warehouse	
5.8.10	Assure participants are offered the opportunity to register to vote, provide assistance if needed, and send completed forms to local elections and send number of registrations collected to the Secretary of State, Elections Division.	Review Policy 480 Locate voter registrations forms in clinic Consult with staff who send in registration forms and at least monthly counts	
5.8.11	Assure separation of duties during certifications.	Review Policy 595 Identify any clinics that are routinely staffed by one individual Review local agency policy for monitoring clinics routinely staffed by a single staff person.	
5.8.12	Assure that staff follow policy on certification and issuing benefits to themselves, co-workers, relatives or friends	Review Policy 620 Identify agency process Consider how to handle the following scenarios: -Certifier's niece comes to be certified -Clerks neighbor arrives to receive service	
5.10	Assure staff implement and follow policy and procedures as outlined in the Oregon WIC Policy and Procedure Manual (PPM).	Locate the PPM online at the Oregon WIC website Determine how policy updates have been communicated and implemented in the past	
5.11	Assures required local agency policies and procedures are up-to-date and implemented.	Review local agency procedures for the following: ☐ High-risk protocol: referring high-risk participants to the WIC RDN/Nutritionist (Policy 661) ☐ Quarterly Nutrition Education Using On-Line and/or Self-Paced Lessons (Policy 820) (<i>if applicable</i>) ☐ WIC services delivered in the	

# 5.	Competencies/Objectives	Action Steps	Notes
		home (Home Visiting Policy 621) (if applicable) ☐ Alternative Hemoglobin Screening Procedure (Policy 626) ☐ Electronic Record Policy and Procedure (Policy 426)	
5.12	Assure certification equipment is maintained to ensure accuracy of measurements and risk evaluation.		
5.12.1	Program has a standard procedure and documents routine testing and if needed calibration of scales based on industry standards for the equipment.	Review Policy 628 Refer to Anthropometric Training Module State has contract for annual scale calibration; check sticker on scales for date of last calibration	
5.12.2	Program follows a standard procedure and documents routine cleaning and based on industry standards, room temperature of microcuvettes, and posting of current CLIA certificate or waiver.	Review Policy 626 Refer to Hematological Training Module Review cleaning log for blood testing equipment and room temperature of microcuvettes. Locate CLIA certificate or waiver.	
5.13	Ensures local agency procedures protect participant confidentiality.	Review Policy 450 Observe local agency procedures to protect confidentiality of the following: • Participant's electronic and hardcopy records • Participant's privacy during interviews or counseling sessions • Computer information	
5.13.1	Assure that staff sign the Oregon WIC Employee Signature Form annually.	Review Policy 596 Read and sign form Identify where these forms are retained in the local agency	
5.14	Ensures clients are informed of their rights and responsibilities.	Review Policy 635	

# 5.	Competencies/Objectives	Action Steps	Notes
5.14.1	Assure that each participant is provided with an explanation of their rights and responsibilities and obtain a signature on the participant signature form	Review Policy 635 Read Rights and Responsibilities and Participant Signature forms Observe forms being used in clinic during certification intake process	
5.14.2	Assure that ineligibility and graduation letters are issued on a timely basis.	Review Policy 636 Refer to TWIST Training Manual , Chapter 3, Section 8 Consult staff who are responsible for printing and mailing letters	
5.14.3	Assure that complaints against participants, vendors, farmers, farmers' markets, community partners or the WIC Program in general are documented into TWIST	Review Policy 588 Refer to TWIST Training Manual, Chapter 8, Section 1	
5.15	Ensure participants are screened and referred to health and social services.		
5.15.1	Assure applicants and participant 3 to 24 months of age are screened for immunization status and under-immunized are referred to immunization resources	Review Policy 481 and 880	
5.15.2	Assure at initial enrollment and each recertification all participants are screened for Oregon Health Plan (OHP) and written OHP information and referrals are made and documented.	Review Policy 880	
5.15.3	Assure screening and referral for alcohol, tobacco and other drug use by prenatal and postpartum women.	Review Policy 880	
5.15.4	Assure notification to all participants and caretakers about the dangers of alcohol, tobacco and other drugs.	Review Policy 880 Identify poster or other notification location at each clinic site.	
5.15.5	Assure health and social services referral information is provided and documented as requested or when the need arises.	Policy 880	
5.15.6	Assure local referral list is up-to-date.	Policy 880	

6. Data System Use – Uses technology to monitor local agency operations.

# 6.	Competencies/Objectives	Action Steps	Notes
6.1	Effectively uses TWIST functionality for program data entry and retrieval to complete coordinator responsibilities.	Refer to TWIST Training Manual	
6.1.1	Enter completed training modules for all staff	Refer to TWIST Training Manual, Chapter 8, Section 1 Enter own module completion in TWIST	
6.1.2	Utilize Appointment Scheduler	Refer to TWIST Training Manual Chapter 4	
6.1.3	Enter complaints	Refer to TWIST Training Manual Chapter 8, Section 1	
6.1.4	Conduct chart audits	Refer to state local agency monitoring tools	
6.2	Interprets TWIST reports for ongoing monitoring of local agency operations.		
6.2.1	Print Reports	Refer to TWIST Training Manual, Chapter 7	
6.3	Completes Coordinator specific TWIST tasks.		
6.3.1	Maintain User IDs and Passwords	Refer to TWIST Training Manual, Chapter 6, Section 1	
6.3.2	Update staff and clinic information	Refer to TWIST Training Manual, Chapter 8, Section 1 Enter self in TWIST staff information	
6.3.3	Update referral organizations	Refer to TWIST Training Manual, Chapter 8, Section 1	

7. Local Program Operations – Understands day to day operations of WIC.

# 7.	Competencies/Objectives	Action Steps	Notes
7.1	Completes annual local agency reviews – State and Local	Review Policy 215	
7.1.1	Participate in the state review every two years and complete appropriate corrective action.	Review most recent biennial local agency review report and corrective action plan	
7.1.2	Conduct local agency self-evaluation at a minimum of every other year. Include all clinic sites.	Review materials from most recent local agency self evaluation.	
7.2	Provide excellent customer service in a participant centered style to WIC participants on the phone and in person.	Refer to PCE on line training module Review Oregon WIC Listens materials on the Oregon WIC website	
7.3	Provide excellent customer service to partners – vendors, medical providers, community partners, referral organizations.	Identify key partners	
7.4	Staff use correct techniques, accurate nutrition-focused counseling, referrals, stay within scope of practice and demonstrate a minimum competency in participant centered skills	Review the annual observations of CPAs doing certifications by training supervisor. Policy 440 Refer to Observation Review Tool – Participant Centered Counseling Skills	
7.4	Ensure agency is following the Farm Direct Nutrition Program (FDNP) Policies and Procedures.	Review Policy 1100 Identify agency liaison with the State FDNP coordinator	
7.4.1	Assure security of FDNP checks is maintained at all times.	Review security procedures for FDNP checks	
7.4.2	Assure a physical inventory of FDNP checks is conducted at least once per season.	Review physical inventory log for the most recent FDNP season	
7.4.3	Assure all FDNP checks are issued correctly and all can be accounted for.	Refer to TWIST Training Manual, Chapter 3, Section 10	
7.4.4	Assure all FDNP recipients are eligible to receive FDNP checks.	Refer to TWIST Training Manual, Chapter 10	
7.4.5	Assure all clients receiving FDNP checks for the first time in the current year receive the required orientation information.	Observe FDNP check issuance during FDNP season	
7.4.6	Assure fruit and vegetable nutrition education is made	Observe nutrition education provided with	

# 7.	Competencies/Objectives	Action Steps	Notes
	available to FDNP participants and documented.	FDNP check issuance during the FDNP season	
7.4.7	FDNP Check Registers retained for 3 years.	Identify location of FDNP check registers for past three years	
7.5	Ensure homeless facilities and institutions in service area that may serve WIC participants benefit the WIC participant and not the facility.	Policy 655 Identify documentation of communications with the facilities.	

8. Utilizing Resources – Accesses and utilizes resources.

# 8.	Competencies/Objectives	Action Steps	Notes
8.1	Appropriately utilizes State WIC Program Resources	Review available state resources with nutrition consultant	
8.2	Contacts the appropriate state staff person for assistance or information	Retain contact information provided by state nutrition consultant	
8.2.1	Able to contact your agency's state nutrition consultant.	Refer to state staff contact list	
8.2.2	Contacts State Office or state staff as needed: • Main Office number • State WIC Director • Application Support • Fiscal Coordinator • Vendor Management • Farm Direct Nutrition Program • Breastfeeding Coordinator • Training Coordinator • Civil Rights • Complaints, Fraud, Program Abuse • Policy Coordinator	Refer to state staff contact list	
8.2.3	Able to order state produced materials.	Review Policy 425 Review WIC Shopify Store. Identify staff responsible for ordering state materials for the agency	
8.2.4	Receives State email notifications to WIC Coordinators	Identify how information was	

# 8.	Competencies/Objectives	Action Steps	Notes
		communicated with staff in the past	
8.2.5	Accesses Oregon WIC Program Website: http://www.oregon.gov/DHS/ph/wic/index.shtml	Explore Oregon WIC website	
8.2.6	Requests reimbursement for attendance at state trainings and travel to OWCA meetings.	Contact state fiscal coordinator as needed	
	Reimbursement based on state mileage and per diem rates in the form of a grant adjustment		
8.3	Accesses current information on WIC program operations.	Refer to information on the Oregon WIC Website	
8.3.1	Able to locate and use appropriate resources. - Oregon Policy and Procedure Manual - Current USDA regulations - TWIST Training Manual - Nutrition Services Standards	Refer to the Oregon WIC website including the staff page, coordinator page and medical providers page	
8.3.2	Assure agency is involved with state WIC groups	LAWN (Local Agency WIC Nutritionists) NEWS (Nutrition Education in WIC) Breastfeeding Coordinators Training Supervisors	
8.4	Appropriately utilizes available resources outside of the Oregon WIC program		
8.4.1	OWCA (Oregon WIC Coordinator's Association)	Identify meeting schedule for OWCA on coordinators page of the Oregon WIC website Request to join OWCA Basecamp Group.	
8.4.2	WIC Works Website	Refer to http://www.nal.usda.gov/wicworks/	
8.4.3	National WIC Association	Refer to http://www.nwica.org/	

9. Leadership – Demonstrates effective leadership.

# 9.	Competencies/Objectives	Action Steps	Notes
9.1	Promotes the WIC program's mission and goals and advocates for WIC as a Public Health Nutrition Program.	Review the Oregon WIC program mission statement Consider possible mentoring opportunities from an experienced coordinator Review WIC information on agency webpage.	
9.1.1	Share WIC Annual Report & local agency information.	Refer to annual state report and county data sheets on the Oregon WIC website	
9.2	Promotes participant centered services (PCS) as the standard for providing WIC services.	Role model PCS when facilitating staff meetings and interacting with staff and participants	
9.3	Represents WIC's mission, goals, and vision to internal and external partners	Review WIC program power point presentation on the coordinator page of the Oregon WIC website	