

## Coordinator Orientation Checklist

View Contract Deliverables in red (Time Sensitive):

Priority 1				
V	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
	Get a Microsoft account for computer/laptop	Contact Help Desk: 1-888-457-2467	If your agency doesn't use a Department of Health (DOH) purchased computer, you may need to request this step to be completed by your agency's IT Department.	10 minutes
	Gain access to the Learning Center (LC)	Use this <a href="#">guide</a> to complete the <a href="#">WIC Staff and Clinic Change Form</a>	Complete this form to: <ul style="list-style-type: none"> <li>• Enroll in the Learning Center.</li> <li>• Add and remove clinic staff.</li> <li>• Change clinic staff role, email, and supervisor.</li> <li>• Update fiscal contact and contract information.</li> <li>• Update clinic information.</li> </ul> Please send questions about the form to <a href="mailto:WAWICTraining@doh.wa.gov">WAWICTraining@doh.wa.gov</a> or <a href="mailto:WICAddress@doh.wa.gov">WICAddress@doh.wa.gov</a> .	Depends on the number of entries. Approximately 10 minutes to complete form
	Provide quality WIC services	Policy & Procedures, Volume 1, <a href="#">Chapter 1</a> Positive Participant Relations – Quality Services Delivery	Read Chapter 1. <ul style="list-style-type: none"> <li>• Call your WIC clinic after hours and listen to your clinic's message. How does it make you feel? Would you like to call back again if you were applying for WIC?</li> </ul>	10 minutes
	Comply with Program rules	Policy & Procedures Volume 1, <a href="#">Chapter 2</a> Program Compliance	Read Chapter 2. <ul style="list-style-type: none"> <li>• Sign <a href="#">Agreement for Clinic Staff</a>.</li> </ul>	30 minutes

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	Agree to keep participant information confidential	Policy & Procedures, Volume 1, <a href="#">Chapter 25</a> Legal Considerations and Confidentiality	Read Chapter 25. <ul style="list-style-type: none"> <li>Sign Confidentiality Statement (sample at the end of Chapter 25).</li> <li>Your agency may use their own agency confidentiality statement form.                ***Note: All staff must sign the Confidentiality Statement annually.</li> <li>Locate your staff's signed Agreement for Clinic Staff and determine when the forms are due to be completed.</li> </ul>	1 hour, 10 minutes
	Log into the <a href="#">Learning Center (LC)</a> for first time once you receive access.	<a href="#">How to log into the Learning Center for the First Time</a>	Log into the Learning Center once you have access. <ul style="list-style-type: none"> <li>What form do you need to use if you have a group training at the clinic?</li> </ul>	5 minutes
	Contact Local Program Consultant (LPC) and introduce yourself.	Email <a href="mailto:WICLPC@doh.wa.gov">WICLPC@doh.wa.gov</a> to inquire.	Write your LPC's name, email, and telephone number here:	5 minutes
	Welcome to WIC course	<a href="#">DOH STATE WIC Welcome to WIC</a>	View the Welcome to WIC course.	20 minutes
	Post Public Health Emergency (PHE) Policies	<a href="#">Post Public Health Emergency (PHE) Policies</a>	<ul style="list-style-type: none"> <li>How is your agency implementing the post Public Health Emergency policies?</li> <li>How are your WIC clinic(s) implementing remote services policies?</li> </ul>	2 hours

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			<ul style="list-style-type: none"> <li>How do they view participant’s documents?</li> <li>What challenges are you having implementing or following the policies?</li> </ul>	
	Notification, Fair Hearings and Civil Rights	Volume 1, <a href="#">Chapter 20</a> Notification, Fair Hearings and Civil Rights	<ul style="list-style-type: none"> <li>Read Chapter 20.</li> <li>What steps do you take if you receive a Civil Rights complaint?</li> </ul>	30 minutes
	Civil Rights Training	<a href="#">Civil Rights Training</a> on the website	<ul style="list-style-type: none"> <li>Complete the Civil Rights Training  <b>***Note:</b> All staff must receive Civil Rights Training annually.</li> </ul>	1 hour, 20 minutes
	Required local agency policies, permissions, or approvals	<a href="#">Required Local Agency Policies</a>	<ul style="list-style-type: none"> <li>Review and determine which policies your agency needs.</li> <li>Locate and review Local Agency Policies.</li> <li>Schedule time to complete missing policies and update those that are outdated.</li> </ul>	1 hour, 30 minutes
	<b>WIC Contract</b>	Volume 2, <a href="#">Chapter 1</a> WIC Contract	<ul style="list-style-type: none"> <li>What are the names of the contracts person(s) and the fiscal person(s) at your agency?</li> <li>Review the Statement of Work (SOW) for the WIC contract and locate the following:                             <ul style="list-style-type: none"> <li>Authorized Participating Caseload: _____</li> </ul> </li> </ul>	15 minutes

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			<ul style="list-style-type: none"> <li>○ Nutrition Services Plan Due Dates: _____</li> <li>○ Budget Workbook Submission Due Date: _____</li> </ul>	
	<b>Caseload Management</b>	<a href="#">DOH State WIC Caseload Management</a>	<ul style="list-style-type: none"> <li>● View DOH State WIC Caseload Management course.</li> </ul>	40 minutes
	<b>Budget Workbook and WIC Expense Report</b>	Volume 2, <a href="#">Chapter 3</a> Budget Workbook and Expense Report View in the <a href="#">LC: DOH STATE WIC FFY24 WIC Budget Workbook Training</a>	Read Chapter 3. <ul style="list-style-type: none"> <li>● Who is responsible for completing the annual WIC Budget Workbook?</li> <li>● What information are you responsible for?</li> <li>● Who completes the REV EXP sheet on the WIC Budget Workbook and submits the monthly A-19 invoices?</li> <li>● How will you be notified of the monthly A-19 submissions?</li> </ul>	1 hour
	<b>Time Studies/ Timekeeping</b>	Volume 2, <a href="#">Chapter 3</a> , Budget Workbook and Expense Report  <a href="#">DOH STATE WIC Time Study Training</a>  <a href="#">Memo 2021-79, common WIC activities in the four federal cost</a>	Read policies on Complete Time Studies for Calculating Staff Costs and Determine Cost Types. <ul style="list-style-type: none"> <li>● Does your agency do time studies or time keeping?</li> <li>● What are time studies? How often should they be done?</li> </ul>	1 hour 30 minutes

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V	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
		<a href="#">types</a> (Local Agency SharePoint site).	<ul style="list-style-type: none"> <li>Who submits the quarterly time studies? How do they submit completed time studies? When are they due?</li> <li>How are staff documenting their time using the four cost types?</li> <li>Who communicates the rollup cost type percentages to fiscal/other staff?</li> <li>Add the dates of the next quarterly time study and submission of time study workbook to your calendar.</li> </ul>	
	<b>Nutrition Services Plan (NSP)</b>	Volume 2, <a href="#">Chapter 12</a> Annual Nutrition Education Plan	Read Chapter 12. <ul style="list-style-type: none"> <li>What are the goals your agency is working on for the year?</li> </ul> Read Memo 2023-135.	45 minutes
	Allowable Costs/ Purchasing and Inventory	Volume 2, <a href="#">Chapter 4</a> , Allowable Costs  Volume 2, <a href="#">Chapter 5</a> , Purchasing and Inventory	Read Chapter 4. <ul style="list-style-type: none"> <li>List three things you might want to spend WIC funds on: either for the staff or the clinic. Are they an allowable cost? Do you need pre-approval from LPC?</li> </ul> Read Chapter 5. <ul style="list-style-type: none"> <li>What policy must be written to guide staff who purchase and manage supplies?</li> </ul>	1 hour, 30 minutes

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			<ul style="list-style-type: none"> <li>How often do you need to do inventory of all required items per the Inventory policy?</li> </ul> Who in your agency's fiscal and purchasing departments need to have this policy information?	
	Electronic Devices, Security and Service Interruption Plan	Vol. 2, <a href="#">Chapter 8</a>	Read Chapter 8. Who do you contact when it appears the Electronic Benefits System (EBT) is down?	45 minutes
	Separation of Duties (SOD)	Vol. 1, <a href="#">Chapter 18</a> , Certification <a href="#">SOD File Review Form</a> <a href="#">SOD Waiver File Review</a>	<ul style="list-style-type: none"> <li>Review the state policy and your agency's SOD policy.</li> <li>Who reviews SOD charts for your agency?</li> <li>Use the Cascades WA WIC Separation of Duties report for a 2-week period and determine:                             <ul style="list-style-type: none"> <li>% of charts:</li> <li># of charts needed:</li> </ul> </li> <li>Review your agency's last monthly SOD chart reviews.</li> </ul>	1 hour 30 minutes
	WIC Record Retention	Volume 2, <a href="#">Chapter 7</a> , Record Retention	Read Chapter 7. <ul style="list-style-type: none"> <li>How long are you required to keep participant files and clinic operations documents?</li> </ul>	10 minutes

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			<ul style="list-style-type: none"> <li>Which records/documents are required to kept by your agency for six years?</li> </ul>	
	Local Agency Yearly Self-Evaluation	Volume 2, <a href="#">Chapter 6 Monitors and Audits</a>	<p>Read Local Agency Yearly Self-Evaluation policy.</p> <ul style="list-style-type: none"> <li>Locate your agency's written self-evaluation plan.</li> <li>Review the last LA self-evaluation documents and corrective action plan (CAP).</li> </ul> <p>Schedule your current year self-evaluation activities to fulfill the plan requirements.</p>	2 hours
	Prepare for WIC Monitor	<p>Volume 2, <a href="#">Chapter 6</a>, Monitoring and Audits</p> <p><a href="#">WIC Program Monitoring</a></p> <p><a href="#">View DOH STATE WIC Program Monitor Process Curriculum</a></p>	<p>Read Chapter 6.</p> <ul style="list-style-type: none"> <li>What areas does your agency/clinic need to improve?</li> <li>What steps will you take to make the change needed?</li> </ul>	Curriculum takes about an hour to view
	Managing WIC cards	<p>Read Volume 1, <a href="#">Chapter 22</a> Issue WIC Food Benefits, pages 46-50</p> <p><a href="#">WIC Card Daily Check-out &amp; Inventory Log</a> and</p>	<p>Review Chapter 22, pages 46-50</p> <ul style="list-style-type: none"> <li>Complete information for <a href="http://myfulfillment.wa.gov">myfulfillment.wa.gov</a> to order WIC card.</li> <li>In an emergency, contact your LPC for cards.</li> </ul>	30 minutes

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		<a href="#">WIC Card Inventory Log</a>	<ul style="list-style-type: none"> <li>Who's responsible for managing the WIC cards at the clinic?</li> <li>When do you plan to do your quarterly review of the WIC Card Inventory Log?</li> <li>How can you use the Detail Report of Serialized Inventory Products to reconcile the card inventory?</li> </ul>	
	Outreach	Volume 2, Chapter 4, Outreach This chapter is not posted to the website. Request an electronic copy by emailing <a href="mailto:WAWICTraining@doh.wa.gov">WAWICTraining@doh.wa.gov</a> .  <a href="#">Outreach materials</a> – available to order	Read Volume 2, Chapter 4 <ul style="list-style-type: none"> <li>Plan for annual outreach requirement.</li> <li>Ask staff what organizations and programs they refer participants to during appointments.</li> </ul>	20 minutes
	High Risk Participants  **Note: If you have an RD working with high-risk participants, this may be priority 2.	Volume 1, <a href="#">Chapter 16</a> , Nutrition Education  <a href="#">Required Guidance - Second Contacts - High-Risk</a>	<ul style="list-style-type: none"> <li>Review the policy and required guidance.</li> <li>Review the Cascades WA WIC High Risk Participants List (Clinic report).               <ul style="list-style-type: none"> <li>How many participants don't have a high-risk care plan and don't have a future RD appointment?</li> </ul> </li> </ul>	30 minutes



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			<ul style="list-style-type: none"> <li>○ Who in your clinic is responsible for using this report to ensure compliance?</li> </ul>	
	Gain access to Cascades by setting up a SAW account.	<p><b>1. Contact Cascades Support</b> (1-800-841-1410, press 3, press 2)</p> <p><b>Request to add a user account for Cascades and the Cascades Sandbox.</b></p> <p><b>2. Go to <a href="#">SAW for Cascades Production</a></b> for the Coordinator’s Instructions and Handout A &amp; B.</p> <p>Contact Cascades Support to get the Service Code.</p>	<p>Complete the instructions.</p> <p><b>Note:</b> You may already have a SAW account if you set up your SharePoint account. Begin the directions on Step 3.</p> <ul style="list-style-type: none"> <li>• Call Cascades Support if you need help at 1-800-841-1410, press 3, press 2.</li> </ul>	45 minutes to 1 hour
	Maintain Local Agency and Clinic data in Cascades	<p>Contact Cascades Support if help is needed (1-800-841-1410, press 3, press 2).</p> <p>Cascades Steps: <a href="#">962-1022-Inactivate Staff in Cascades</a></p>	<p><b>Inactivate staff</b> that are no longer employed by your agency.</p> <p>Follow the steps for inactivating a staff person in Cascades</p>	Depends on activity

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	Gain access to Cascades Sandbox by setting up a Test SAW account	<a href="#">TEST SAW for the Cascades Sandbox</a> Contact Cascades Support (1-800-841-1410, press 3, press 2) to get the Service Code	Review the Coordinator Instructions and Handout 1 & 2. <ul style="list-style-type: none"> <li>The Sandbox is an area for staff to practice without impacting participant data.</li> </ul>	45 minutes
	Find answer to policy questions	<ul style="list-style-type: none"> <li>Check the <a href="#">Policy and Procedures</a></li> <li>Call Policy Support at 1-800-841-1410, press 3, press 1 (Available Monday – Friday, 8 am - 5 pm)</li> <li>Email Policy Support at <a href="mailto:WICpolicysupport@doh.wa.gov">WICpolicysupport@doh.wa.gov</a></li> </ul>	Call or email when you have policy questions	Depends on the question
	Explore Coordinator Corner of the WIC web page	<a href="#">Coordinator Corner</a> (bottom of the web page)	What activities have you found in the <a href="#">Coordinator Calendar</a> that are due this month?	10 minutes

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	Receive electronic files of specific Volume 2 policy chapters not posted to the web	Contact <a href="mailto:WAWICTraining@doh.wa.gov">WAWICTraining@doh.wa.gov</a>	Request from state WIC office Volume 2 policies available as hard copies only: <ul style="list-style-type: none"> <li>• Outreach</li> <li>• Staffing and Training</li> </ul>	5 minutes
	Gain access to the Local Agency SharePoint for memos, Q-WIC notes, and other documents.	<a href="#">LA SharePoint</a> (SP) Site  Contact: Shannon Weatherly at <a href="mailto:Shannon.Weatherly@doh.wa.gov">Shannon.Weatherly@doh.wa.gov</a> Or Call Cascades Support (CS) at 1-800-841-1410, press 3, press 2.	<ul style="list-style-type: none"> <li>• Ask for access to the local agency SharePoint site.</li> <li>• Set up SharePoint User Account through SAW; call CS if you need help.</li> <li>• How many memos have been sent to coordinators so far this year? (hint: look at memo number)</li> </ul>	30 minutes
	Local agency using the DOH IT Support Model  Get a Zoom Account for appointments with participants and/or staff meetings	Use this <a href="#">guide</a> to complete the online <a href="#">WIC Staff and Clinic Change Form</a> .	Complete this form to have access to a Zoom account. Please send questions about the form to <a href="mailto:WAWICTraining@doh.wa.gov">WAWICTraining@doh.wa.gov</a> or <a href="mailto:WICAddress@doh.wa.gov">WICAddress@doh.wa.gov</a> Or <ul style="list-style-type: none"> <li>• Cascades Support at 1-800-841-1410, press 3, press 2</li> </ul>	10 minutes

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			<p>Or</p> <ul style="list-style-type: none"> <li>Contact: Shannon Weatherly at <a href="mailto:Shannon.weatherly@doh.wa.gov">Shannon.weatherly@doh.wa.gov</a></li> </ul> <p>Set up a Zoom appointment with a staff person.</p> <ul style="list-style-type: none"> <li>Send an invitation.</li> <li>Turn on and off your camera.</li> <li>Show your screen.</li> <li>Close the meeting.</li> </ul>	
	Secure access to Master File Transfer (MFT)	<p>Contact <a href="mailto:WICDataRequests@DOH.WA.GOV">WICDataRequests@DOH.WA.GOV</a></p> <p><b>Note:</b> There is limited staff access to the secure files. Only staff who “need” to get the reports will be given access. We don’t give access to staff for “convenience” retrieval.</p>	<ul style="list-style-type: none"> <li>Request MFT account</li> <li>Who had or has access to your MFT folder?</li> <li>Do you need to remove a staff person from having access to your folder?</li> <li>Send email to WICDataRequests to add an additional staff person</li> <li>Send email to WICDataRequests to remove a staff person</li> </ul>	5 minutes

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V	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
			<ul style="list-style-type: none"> <li>How many days do you have to download your reports?</li> </ul>	
	Request a specific report clinic data or Ad hoc reports	<a href="mailto:WICDataRequests@DOH.WA.GOV">WICDataRequests@DOH.WA.GOV</a>	Only necessary if you have a specific data request that isn't already available.	Depends on the request
	WIC Reports in the MFT folder	Breastfeeding Reports (Semi-annual) Caseload Reports (Monthly)	Review the latest Breastfeeding and caseload reports. <ul style="list-style-type: none"> <li>Compare the number of breastfeeding to non-breastfeeding participants. How can we use this report to promote breastfeeding?</li> <li>How can we use the caseload report to improve retention and increase participation?</li> </ul>	30 Minutes
	Cascades Reports	Clinic reports: WA WIC Separation of Duties Report WA WIC High Risks Participants list WA WIC No Activity List New WA WIC Clinic Appt Schedule	Review each report.	Depends on reports (larger clinics may take longer to review data)

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V	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
		WA WIC Appointment History with last modifier Detail Report of Serialized Inventory Products		
	Submit changes for Local Agency Directory and staffing	Use this <a href="#">guide</a> to complete the <a href="#">WIC Staff and Clinic Change Form</a> .	Complete this form to: <ul style="list-style-type: none"> <li>• Add and remove clinic staff.</li> <li>• Change clinic staff role, email, and supervisor.</li> <li>• Update fiscal contact and contract information.</li> <li>• Update clinic information</li> </ul> Please send questions about the form to <a href="mailto:WAWICTraining@doh.wa.gov">WAWICTraining@doh.wa.gov</a> or <a href="mailto:WICAddress@doh.wa.gov">WICAddress@doh.wa.gov</a>	Depends on the number of entries. Approximately 10 minutes to complete form
	When is a Breastfeeding Review needed?	Find in Learning Center (LC): DOH State WIC <a href="#">The Breastfeeding Review Part 1</a> DOH State WIC <a href="#">The Breastfeeding Review Part 2</a>	View The Breastfeeding Review Part 1 & Part 2: <ul style="list-style-type: none"> <li>• Who is required to do a breastfeeding review?</li> <li>• When is the breastfeeding review required?</li> </ul>	Part 1: 7 minutes Part 2: 21 minutes

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V	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
	Cultural Humility and Implicit Bias	Find in Learning Center (LC) <a href="#">Session One Introduction to CLAS</a> <a href="#">Session Three Introduction to CLAS</a>	View courses. Identify biases around beliefs, traditions, norms, values, and customs.	Session 1: 30 min Session 3: 20 min
	Learn about requirements for bloodborne pathogens	<a href="#">DOH STATE WIC Bloodborne Pathogens Training (LC)</a>	Review the Annual Bloodborne Pathogen(BBP) training aimed to prevent WIC staff from being exposed to BBPs <ul style="list-style-type: none"> <li>• Review potential exposures</li> <li>• What to do if exposed</li> <li>• Complies with federal and state laws</li> </ul>	
	Learn about using a virtual platform for appointments and meetings.	View DOH STATE WIC <a href="#">The Basics – Using Video Technology for Remote WIC Services</a>	<ul style="list-style-type: none"> <li>• Learn about using a virtual platform for appointments and meetings.</li> </ul>	15 minutes
	Learn about staff roles in WIC.	Volume 2, Chapter 14 Staffing This chapter is not posted to the website. Request an electronic copy by emailing <a href="mailto:WAWICTraining@doh.wa.gov">WAWICTraining@doh.wa.gov</a> .	Read Volume 2, Chapter 14. <ul style="list-style-type: none"> <li>• What are the requirements for each staff role?</li> <li>• Do your staff members meet the requirements for their role?</li> </ul>	45 minutes

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			<ul style="list-style-type: none"> <li>Shadow and interview staff in different roles.</li> <li>Observe them using Cascades for their work.</li> <li>What tools do they use?</li> </ul>	
	Learn Nutritionist Responsibilities	Request RDN Orientation Document from <a href="mailto:WAWICTraining@doh.wa.gov">WAWICTraining@doh.wa.gov</a>	Review the RDN Orientation document. <ul style="list-style-type: none"> <li>Are there responsibilities you might work together with the RDN?</li> </ul>	15 minutes
	Learn Breastfeeding Coordinator/Lead and Breastfeeding Peer Counselor responsibilities	Volume 1, <a href="#">Chapter 15</a> Breastfeeding	Read Chapter 15. <ul style="list-style-type: none"> <li>Who is the Breast Feeding (BF) Coordinator in your clinic? What are the initial training requirements for the BF Coordinator?</li> <li>Who is/are the BF Peer Counselors?</li> <li>What are the annual training requirements for the BF Coordinator?</li> </ul>	2 hours



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			<ul style="list-style-type: none"> <li>What are the annual BF training requirements for staff?</li> <li>(If you have a peer counseling program) Where is your written protocol for the breastfeeding peer counseling program?</li> </ul>	
	Order breast pumps and supplies	Volume 1, <a href="#">Chapter 15</a>  View LC Course: DOH STATE WIC <ul style="list-style-type: none"> <li><a href="#">Cascades Issue Breast Pump and Supply Inventory Training</a></li> <li><a href="#">Breast Pumps and Supply Inventory Training</a></li> <li><a href="#">Cascades Multiuser Breast Pump Follow Up and Return Inventory Training</a></li> </ul>	Refer to Chapter 15. <ul style="list-style-type: none"> <li>Who manages and oversees the agency’s breast pump program and is the point of contact for the state staff?</li> <li>What breast pump policies have been developed and approved by the state staff for your local agency?</li> <li>Where are pump supplies stored?</li> <li>Does inventory look appropriate?</li> </ul>	Cascades Issue Breast Pump and Supply Inventory: 30 minutes  Breast Pumps & Supply Inventory: 46 minutes  Cascades Multiuser Breast Pump: 23 minutes

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V	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
	List of Training Opportunities for Staff; funding available specific to training	<a href="#">Training Opportunities for WIC Staff</a> <b>Note:</b> this list is continually updated on the web. Consider not printing but viewing often.	<ul style="list-style-type: none"> <li>Consider assisting staff to find a training that will help meet their yearly training requirements for nutrition and breastfeeding.</li> </ul>	10 minutes
	Explore the WA WIC web page for staff	<a href="#">Information for WIC Staff</a>	<ul style="list-style-type: none"> <li>Where can staff find support for Cascades?</li> <li>Where are the Policy and Procedures, Volume 1 &amp; 2?</li> </ul>	30 minutes
	Explore WIC web page for the public	<a href="#">You and Your Family</a>	<ul style="list-style-type: none"> <li>What types of services does WIC provide?</li> </ul>	30 minutes
	View web page for program forms and materials	<a href="#">WIC Program Forms Materials website</a>	Review how to <a href="#">order</a> WIC materials <ul style="list-style-type: none"> <li>Find the form for ordering hematology supplies.</li> <li>Find the Rights and Responsibilities form available in other languages.</li> </ul>	30 minutes
	Order hematology supplies	Volume 1, <a href="#">Chapter 10</a> , pages 29-39  Recommend: Use the <a href="#">Hematology Supply Order Form</a> to order all	<ul style="list-style-type: none"> <li>How often does equipment need to be clean and maintained?</li> <li>Where are the OSHA guidelines for disposing of sharps containers?</li> </ul>	20 minutes

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		HemoCue, Masimo, and hematology supplies.	<ul style="list-style-type: none"> <li>Do you have a written policy about the use of personal protective equipment (PPE)?</li> <li>How long is your local agency required to keep the acknowledgement email and the completed order records (packing slip) on file for?</li> </ul>	
	WIC Medical Documentation (MDF) Forms	Volume 1, <a href="#">Chapter 24 Medical Documentation Form</a>  <a href="#">Women</a> <a href="#">Infants</a> <a href="#">Children</a>	Review form. <ul style="list-style-type: none"> <li>Does a participant need a prescribed formula or food?</li> <li>If there aren't any hard copies printed off, print some copies to have on hand at the clinic in case internet goes down.</li> <li>What happens to the hard copies of the form once they return from the medical provider's office?</li> </ul>	15 minutes
	Locate WIC/Medicaid Nutrition Form	Volume 1, <a href="#">Chapter 24 WIC/Medicaid Nutrition Form</a>	Review form. <ul style="list-style-type: none"> <li>If there aren't any hard copies printed off, print some hard copies to have on hand in case internet goes down.</li> </ul>	15 minutes

## Coordinator Orientation Checklist

View Contract Deliverables in red (Time Sensitive):

Priority 2				
V	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
			<ul style="list-style-type: none"> <li>When would this form be used?</li> </ul>	
	See the WIC Shopping Guide & WIC Shopper App	<a href="#">WIC Foods</a> <a href="#">WIC Shopping Guide</a> and the <a href="#">WICShopper App</a>	<ul style="list-style-type: none"> <li>View the WIC Shopper App information. Download the Shopper App on your phone. Look at Washington’s site. Try using the scan in the grocery store.</li> <li>What languages are available for the WIC Shopping Guide and WICShopper App?</li> </ul>	30 minutes

## Coordinator Orientation Checklist

**View Contract Deliverables in red (Time Sensitive):**

Priority 3				
V	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
	<b>Make clinic changes in Cascades:</b> Telephone number Email address Fax number Hours of operation Address Coordinator contact	Log into Cascades	Go to: <ul style="list-style-type: none"> <li><b>Operations</b></li> <li><b>Setup</b></li> <li><b>Maintain Local Agencies or Maintain Clinics</b></li> <li>Enter Name and <b>Search</b> for agency/clinic</li> <li>Open by clicking on the pencil (left)</li> <li>Make changes on the <b>Create &amp; Maintain Local Agency/Local Clinic</b></li> </ul>	Depends on changes needed
	Learn about Adverse Childhood Experiences	Find in <a href="#">LC, DOH STATE WIC Adverse Childhood Experiences (ACES)</a>	<ul style="list-style-type: none"> <li>Consider how ACEs impact you.</li> <li>Consider how ACEs may impact participants.</li> <li>Consider how ACEs impact staff.</li> </ul>	60 minutes
	Learn what's required to become a Competent Paraprofessional Authority (P-CPA) or Certifier	<a href="#">Certifier Competency Training and Tools</a>	<ul style="list-style-type: none"> <li>Review and consider working towards completing the Certifier Competency Training.</li> </ul> <p><b>Note:</b> The coordinator oversees this training and it's helpful to have gone through the training.</p>	60 minutes

## Coordinator Orientation Checklist

View Contract Deliverables in red (Time Sensitive):

Priority 3				
V	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
	DOH STATE WIC Handling Difficult Situations	View in <a href="#">LC</a> , <a href="#">DOH STATE WIC Handling Difficult Situations</a>	<ul style="list-style-type: none"> <li>What tool(s) can you use for de-escalating situations?</li> </ul>	45 minutes
	Farmers Market Nutrition Program (FMNP) Complete training prior to FM season if you participate in the program	Volume 1, <a href="#">Chapter 8</a> Farmers Market Nutrition Program	Read Chapter 8. <ul style="list-style-type: none"> <li>Will or does your clinic participate in the Farmers Market Nutrition Program (FMNP)?</li> <li>Locate your local agency's FMNP written policy and determine when the annual revision needs to be completed by.</li> <li>What needs to be done before a staff person can give out FMNP benefits?</li> </ul>	30 minutes
	Getting to know the Cascades system.	Find in the LC eight DOH STATE WIC Computer Based Trainings (CBT). The companion supplements are found on the web site. <ul style="list-style-type: none"> <li>DOH STATE WIC <a href="#">CBT Unit 1: Getting Started with Cascades</a> <ul style="list-style-type: none"> <li>Supplement: <a href="#">Unit 1 Getting Started</a></li> </ul> </li> </ul>	Review CBTs and Training Supplements <ul style="list-style-type: none"> <li>Attend a Core WIC Training. (<b>Note:</b> These trainings are on hold for now.)</li> </ul>	Unit 1: 34 min Unit 2: 34 min Unit 3: 1 hour Unit 4: 42 min Unit 5: 38 min Unit 6: 55 min Unit 7: 25 min Unit 8: 28 min

## Coordinator Orientation Checklist

View Contract Deliverables in red (Time Sensitive):

Priority 3				
V	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
		<ul style="list-style-type: none"> <li>• DOH STATE WIC <a href="#">CBT Unit 2: Adding Families and Scheduling Appointments</a> <ul style="list-style-type: none"> <li>○ Supplement: <a href="#">Unit 2 Add a New Family and Schedule Appointments</a></li> </ul> </li> <li>• DOH STATE WIC <a href="#">CBT Unit 3: Certifying a Pregnant Woman and Child</a> <ul style="list-style-type: none"> <li>○ Supplement: <a href="#">Unit 3 Certify a Pregnant Woman and Child</a></li> </ul> </li> <li>• DOH STATE WIC <a href="#">CBT Unit 4: Manage Care Plan and Issue Benefits</a> <ul style="list-style-type: none"> <li>○ Supplement: <a href="#">Unit 4 Manage Care Plan and Issue Benefits</a></li> </ul> </li> <li>• DOH STATE WIC <a href="#">CBT Unit 5: Subsequent Certification of Breastfeeding Woman and Infant</a> <ul style="list-style-type: none"> <li>○ Supplement: <a href="#">Unit 5 Subsequent Certification of</a></li> </ul> </li> </ul>		<p>Additional time: Each Cascades Supplement will take about 15 minutes to review.</p>

## Coordinator Orientation Checklist

View Contract Deliverables in red (Time Sensitive):

Priority 3				
V	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
		<p><a href="#">Breastfeeding Woman and Infant</a></p> <ul style="list-style-type: none"> <li>DOH STATE WIC <a href="#">CBT Unit 6: Manage a Care Plan</a> <ul style="list-style-type: none"> <li>Supplement: <a href="#">Unit 6 Manage Care Plan for a Woman and Child</a></li> </ul> </li> <li>DOH STATE WIC <a href="#">CBT Unit 7: Add a Foster Child</a></li> <li>DOH STATE WIC <a href="#">CBT Unit 8: Manage Care Plan and Issue Benefits for a Foster Child</a> <ul style="list-style-type: none"> <li>Supplement: <a href="#">Unit 7 &amp; 8 Foster Families and Children, Manage Care Plan and Issue Benefits to a Foster Child</a></li> </ul> </li> </ul>		
	Learn Certification Procedures	<p>View in the LC, DOH STATE WIC</p> <ul style="list-style-type: none"> <li><a href="#">Cascades Certification Policy Training – Part 1</a></li> <li><a href="#">Cascades Income Assessment Policy Training</a></li> </ul>	<ul style="list-style-type: none"> <li>What forms do frontline staff use often?</li> <li>How can you assure applicants and participants will feel welcome at the clinic?</li> </ul>	<p>Cascades Cert Policy Tr. Pt. 1: 45 minutes</p> <p>Cascades Income Assess Policy Tr.: 45 minutes</p>



## Coordinator Orientation Checklist

View Contract Deliverables in red (Time Sensitive):

Priority 3				
V	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
	Cascades Steps and Staff Tools	<a href="#">Cascades Steps and Staff Tools</a>	<ul style="list-style-type: none"> <li>Review the different Cascades tools for staff.</li> <li>Log into the Sandbox and work through a Cascades Step tool.</li> </ul>	Depends 22 different steps
	WA WIC Breastfeeding Curriculum	DOH STATE WIC <a href="#">Breastfeeding Curriculum Level 1</a>	<ul style="list-style-type: none"> <li>Required for all staff to view</li> </ul>	
	WA WIC Breastfeeding Curriculum	DOH STATE WIC <a href="#">Breastfeeding Curriculum Level 2</a>	<ul style="list-style-type: none"> <li>Required for peer counselors, certifiers, breastfeeding coordinator, and designated breastfeeding expert (DBE) to view.</li> </ul>	
	WA WIC Breastfeeding Curriculum	DOH STATE WIC <a href="#">Breastfeeding Curriculum Level 3</a>	<ul style="list-style-type: none"> <li>Required for certifiers, breastfeeding coordinator, DBE to view.</li> </ul>	
	Optional WA WIC Breastfeeding Curriculum	DOH STATE WIC <a href="#">Breastfeeding Curriculum Level 4</a>	<ul style="list-style-type: none"> <li>Required for DBE</li> </ul>	

## Coordinator Orientation Checklist

View Contract Deliverables in red (Time Sensitive):

Priority 3				
V	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
	Explore National WIC Association (NWA)	<a href="#">National WIC Association</a> <b>Note:</b> WA WIC staff are all members There's no fee; it's paid by state WIC office.	Set up your <a href="#">account</a> . <ul style="list-style-type: none"> <li>• Select WA State Department of Health.</li> <li>• Check the accuracy of the clinic's WIC information by entering in your zip code.</li> </ul>	20 minutes
	Explore USDA WIC Works Resource System	<a href="#">WIC Works</a>	<ul style="list-style-type: none"> <li>• What are the "new resources"?</li> <li>• What topic interests you most?</li> </ul>	30 minutes
	WIC Nutrition Services Standards (NSS)	<a href="#">WIC Nutrition Services Standards</a>	Review the document. <ul style="list-style-type: none"> <li>• Open the NSS document by clicking on the link in the lower right of your screen.</li> </ul>	60 minutes
	NSS Self-assessment Tool	<a href="#">NSS Online self-assessment tool</a>	Set up a WIC Works Resource System (USDA) account by selecting "Log In". <ul style="list-style-type: none"> <li>• Take the <a href="#">Online self-assessment tool</a>.</li> </ul> <b>Note:</b> Some sections apply only for the state office.	30 minutes

## Coordinator Orientation Checklist

View Contract Deliverables in red (Time Sensitive):

Priority 3				
V	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
	Value Enhanced Nutrition Assessment (VENA)	<a href="#">VENA</a>	Review the November 2020 <a href="#">Value Enhanced Nutrition Assessment Guidance</a> <ul style="list-style-type: none"> <li>Review the <a href="#">VENA training videos</a>.</li> <li>How can you support your staff to do a good job assessing applicants/participants?</li> </ul>	1 hour
	Locate the Cascades WIC Services Worksheets	<a href="#">Guidelines and worksheets</a>	<ul style="list-style-type: none"> <li>Confirm your clinic has worksheets printed for when Cascades is not accessible due to winter weather, or SAW not operational, etc.</li> </ul>	15 minutes
	Anthropometric Equipment	Volume 1, <a href="#">Chapter 9 Appendix</a> for guidance on buying anthropometric equipment.	<ul style="list-style-type: none"> <li>What products are staff not allowed to use for WIC measurements?</li> </ul>	15 minutes
	Find the WIC Vendors resources	<a href="#">WA WIC Vendors</a>	Review the last e-bulletin.	15 minutes
	View how to report complaints or incidents at Incident Report	<a href="#">Report an Incident to State WIC Program</a>	Review what's considered an incident.	15 minutes

## Coordinator Orientation Checklist

View Contract Deliverables in red (Time Sensitive):

Priority 3				
V	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
	Cascades News (in Cascades system)	Cascades	Cascades News is information shared from the state office. Communication is added when the message is helpful for all local staff to learn.	5 minutes
	Fiscal and Contract Questions	<a href="#">External Fiscal/Contract Communication Table</a>	<ul style="list-style-type: none"> <li>• Ask LPC for the new DOH ONS contact list.</li> <li>• Provide to all local agency staff who are responsible for topics on the External Fiscal/Contract Communication Table.</li> <li>• Who would you email for questions on time studies?</li> <li>• Who would you contact about DOH fiscal monitoring?</li> <li>• Who would you contact with questions on your agency’s contract Statement of Work (SOW)?</li> </ul>	

## Coordinator Orientation Checklist

View Contract Deliverables in red (Time Sensitive):

New WIC Staff Set-up				
√	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
	Obtain a log on for a DOH computer/laptop	<a href="mailto:WIC.helpdesk@doh.wa.gov">WIC.helpdesk@doh.wa.gov</a>	Email the Help Desk and request a set up for the new employee. The Help Desk person will assess the needs at that time.  <b>Note:</b> If your agency is on the LA IT Support Model then your agency's IT Department will be responsible for this.	
	Add staff to Cascades	<a href="#">Handout A: Cascades User Account</a>	To add staff into Cascades, follow the steps and add information into the starred fields for the new employee. <b>Tip:</b> Use scroll bar on far right to see the add button.	
	Add staff to the Learning Center (LC)	Use this <a href="#">guide</a> to complete the <a href="#">WIC Staff and Clinic Change Form</a>	Complete this form to: <ul style="list-style-type: none"> <li>• Enroll in the Learning Center</li> <li>• Add and remove clinic staff.</li> <li>• Change clinic staff role, email, and supervisor.</li> </ul> Please send questions about the form to <a href="mailto:WAWICTraining@doh.wa.gov">WAWICTraining@doh.wa.gov</a> or <a href="mailto:WICAddress@doh.wa.gov">WICAddress@doh.wa.gov</a> .	

## Coordinator Orientation Checklist

View Contract Deliverables in red (Time Sensitive):

New WIC Staff Set-up				
√	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
	New staff sign up for SAW account	<a href="#">SAW for Cascades Production</a>	<ul style="list-style-type: none"> <li>Direct staff to sign up for SAW account (use same email as the LC).</li> <li>Give staff the Username you entered in Cascades.</li> <li>Provide Service Code (contact Cascades Support).</li> </ul>	
	Staff hired for a Certifier position need to complete the Certifier Competencies	<a href="#">WIC Certifier Competency Training and Tools</a>	<ul style="list-style-type: none"> <li>Who can be a Certifier Competency Trainer?</li> <li>Identify a trainer to oversee staff Certifier Competency Training.</li> <li>Have staff begin working through Certifier Competency worksheets.</li> </ul>	
	Add staff to Cascades Sandbox	<a href="#">Handout 1: Cascades Sandbox User Account</a>	Add staff to Cascades Sandbox by following these steps. Add information into the starred fields in Cascades for the new employee.	
	New staff sign up for TEST SAW account	<a href="#">TEST SAW for the Cascades Sandbox</a>	Direct staff to sign up for TEST SAW account. Give staff the Username you entered in the Cascades Sandbox.	
	New staff view the Computer Based Trainings in LC	<a href="#">Certifier Competency Worksheet 17</a>	Direct staff to log onto LC once their account is active (this takes about a week).	

## Coordinator Orientation Checklist

View Contract Deliverables in red (Time Sensitive):

New WIC Staff Set-up				
√	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
			<ul style="list-style-type: none"> <li>Worksheet 17 and the Sandbox facilitates familiarity with Cascades.</li> </ul>	
	Assessment Questions Staff Tool for a Participant-Centered Risk Assessment	Certifiers use <a href="#">this tool</a> to complete an initial and sub certification, and a health assessment.	Direct staff to view the Cascades screens that correlate with the Assessment Questions staff tool. <ul style="list-style-type: none"> <li>Practice using the tool to ask the required questions while entering information into the Cascades screens.</li> </ul>	
	New staff, if becoming a certifier, obtains Medical Assistant license	<a href="#">DOH Medical Assistant license</a> – select the license that applies. If only doing a finger poke, select <a href="#">Medical Assistant Registered</a>	Have staff person complete the Medical Assistant application.	
	Hepatitis B Vaccine	<a href="#">Immunization requirements for WA state</a>	Must offer to new staff person the vaccine within 10 days of hire, free of charge.	

## Coordinator Orientation Checklist

View Contract Deliverables in red (Time Sensitive):

Exiting WIC Staff				
√	Learn about WIC	Links/sites/addresses	Activity	Time Estimate
	Check Inactive box in Cascades and Cascades Sandbox	<a href="#">Cascades Steps – Inactivate Staff in Cascades</a>	Follow the Steps to inactivate a user in Cascades. <b>Tip:</b> these same steps apply for the Cascades Sandbox.	
	Remove staff from the Learning Center Remove staff's Zoom account	Use this <a href="#">guide</a> to complete the <a href="#">WIC Staff and Clinic Change Form</a>	Complete this form to: <ul style="list-style-type: none"> <li>Remove clinic staff.</li> <li>Remove staff's Zoom account.</li> </ul> Please send questions about the form to <a href="mailto:WAWICTraining@doh.wa.gov">WAWICTraining@doh.wa.gov</a> or <a href="mailto:WICAddress@doh.wa.gov">WICAddress@doh.wa.gov</a>	Approximately 5 minutes to complete form



## Coordinator Orientation Checklist

View Contract Deliverables in red (Time Sensitive):

Triggering event	Who to contact	By when	Policy
Loss of internet connections	Local agency IT or HTS service desk if DOH provides internet services to your agency or clinic.	As soon as possible after the event	
Loss or damage to DOH loaned electronic devices, such as computer, or peripheral equipment, due to power outages, flood, earthquake, fire...	HTS service desk and Cascades Support.	As soon as possible after the event	Vol 2, <a href="#">Chapter 8</a> , Electronic Devices, Security and Service Interruption Plan.
Potential breach of security due to lost or stolen electronic devices, including agency owned equipment.	LPC	1 business day	Vol 2, <a href="#">Chapter 8</a>
DOH computers: <ul style="list-style-type: none"> <li>• Activate or reactivate windows access</li> <li>• Remove access for terminated employees.</li> </ul>	HTS service desk <a href="mailto:WIC.helpdesk@doh.wa.gov">WIC.helpdesk@doh.wa.gov</a> 1-888-457- 2467	As soon as needed	Vol 2, <a href="#">Chapter 8</a>
Technical Difficulties: <ul style="list-style-type: none"> <li>• Electronic device or network failure</li> <li>• EBT system is down;</li> <li>• software or database problems;</li> <li>• SAW outage</li> </ul>	Cascades Support <a href="mailto:Cascades.Support@doh.wa.gov">Cascades.Support@doh.wa.gov</a> 1-800- 841-1410, option 3, then option 2	As soon as possible after the event	Vol 2, <a href="#">Chapter 8</a>

## Coordinator Orientation Checklist

View Contract Deliverables in red (Time Sensitive):

Triggering event	Who to contact	By when	Policy
Power outages of any type	HTS service desk if on DOH IT Support Model and Cascades Support.		Vol 2, <a href="#">Chapter 8</a>
Clinic site changes	Submit a proposal to open, move, or close a site form to LPC. If early in the discussion/process, notify LPC.	As soon as the agency starts to discuss potential changes and at least 3 weeks prior to a move or three months before a closure.	
Clinic closure or not able to issue benefits for > 3 clinic days, including planned clinic closures.	LPC		Volume 1, <a href="#">Chapter 22</a> Issue WIC Benefits when Computer System is Down or During an Emergency
Public Health Emergencies i.e. outbreak where staffing/resources are impacted	LPC	As soon as possible after the event	

## Coordinator Orientation Checklist

View Contract Deliverables in red (Time Sensitive):

Triggering event	Who to contact	By when	Policy
Natural disasters (flood/fire/earthquake)/Inclement weather	LPC	As soon as possible	
Significant staffing shortages i.e. coordinator; RD	LPC	As soon as possible after the event	
WIC Cards: <ol style="list-style-type: none"> <li>order isn't received within two weeks</li> <li>The amount sent doesn't match the amount ordered</li> <li>The clinic needs an emergency supply of WIC cards</li> </ol>	<ol style="list-style-type: none"> <li>Ask for state staff who review the Fulfillment Center card orders</li> <li>Ask for state staff who review the Fulfillment Center card orders</li> <li>LPC</li> </ol>	As soon as possible	Volume 1, <a href="#">Chapter 22</a> Order WIC Cards
WIC Card Inventory Log discrepancies that clinic staff can't reconcile.	LPC		Volume 1, <a href="#">Chapter 22</a> WIC Card Inventory
Fulfillment Center order discrepancies between what was ordered and what was received.	Email <a href="mailto:WIC@doh.wa.gov">WIC@doh.wa.gov</a>		Volume 1, <a href="#">Chapter 22</a> WIC Card Inventory

## Coordinator Orientation Checklist

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