Welcome to Streamlining WIC Certification
Modernizing and Streamlining WIC Eligibility Determination and Enrollment Processes

By Zoë Neuberger

WIC — the Special Supplemental Nutrition Program for Women, Infants, and Children — serves

WIC is well known for extensive research showing that participation improves the nutrition and health of low-income families — leading to healthier infants, better nutrition during pregnancy, and better health care for children, and subsequently to higher academic achievement for students. WIC is also extremely cost-effective.
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 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!

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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

“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
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**

*What Can I Expect at My First WIC Appointment?*

1. VERIFY
- We will verify WIC eligibility
- Remember to bring the items of proof or a picture of those items on your phone

2. ASSESS
- You will participate in a nutrition assessment, including:
  - Height
  - Weight

3. COUNSELING
- We will discuss your nutrition questions and concerns
- You will fill out a Nutrition Questionnaire

4. WIC CHECKS
- You will receive your WIC checks, and learn how to shop!
Trends over Time

Newly Enrolled Families

(Average Number per Month)
**Trends over Time**

- **Begin mid-Nov**
  - Mailing Nutrition Questionnaires
  - “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

**Among those who received mailings**

<table>
<thead>
<tr>
<th></th>
<th>Nov-Jan</th>
<th>Feb-Apr</th>
<th>May-Jul</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Show</td>
<td>66</td>
<td>56</td>
<td>51</td>
</tr>
<tr>
<td>Fully Enrolled</td>
<td>119</td>
<td>139</td>
<td>140</td>
</tr>
<tr>
<td>Attended Appt</td>
<td>138</td>
<td>166</td>
<td>172</td>
</tr>
</tbody>
</table>

Average number of appointments per month adjusted for business days and monthly flow.
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!

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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

- Decreased caseload
- Budget cuts & decreased staffing
- 1/4 temporary certifications
- Increased barriers for clients
- Extra work for staff
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
Obtaining Documentation in Clinic

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

Online Appointment Requests by Month

<table>
<thead>
<tr>
<th>Month</th>
<th>Requests</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec</td>
<td>12</td>
</tr>
<tr>
<td>Jan</td>
<td>91</td>
</tr>
<tr>
<td>Feb</td>
<td>112</td>
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<tr>
<td>March</td>
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<td>April</td>
<td>189</td>
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<tr>
<td>May</td>
<td>256</td>
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<tr>
<td>June</td>
<td>297</td>
</tr>
<tr>
<td>July</td>
<td>384</td>
</tr>
<tr>
<td>Aug</td>
<td>456</td>
</tr>
</tbody>
</table>
Results

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

- 30 day certs never given
- 30 day certs given 1-5 times per month
- 30 day certs given 6-10 times per month
- 30 day certs given 11-15 times per month
- 30 day certs given more than 15 times per month

Pre-Implementation vs Post-Implementation
Results

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

- Pre-Implementation (Sept 2017)
- Post-Implementation (May 2018)
- Post-Implementation (June 2018)
Lessons Learned and Next Steps

Lessons Learned

- Online Request
- Use of Phone
- Partnerships
- Universal Number
- Use of Computer
- Caseload

Next Steps

- Online Choices
- Support Staff
- Uploading Options
Thank you!

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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 – 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
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!

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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

- 41% Past 6 months
- 30% 7 months to 2 years
- 30% More than 2 years
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?

- 57%: Longer
- 34%: Shorter
- 5%: About the same
- 4%: Unsure

n=249  Question asked for participants >6 months on WIC
Allowed to show proofs on phone?

- Yes: 50% (298 respondents)
- No: 19% (76 respondents)
- Unsure: 29% (116 respondents)
- No phone or cannot access it on my phone: 2% (9 respondents)

n=398
Options if missing proofs?

- Bring it to WIC within 30 days: 161
- E-mail it to WIC within 30 days: 43
- Mail it to WIC within 30 days: 27
- Text it to WIC within 30 days: 12
- Unsure: 227

n=398  Respondents could select multiple options.
Thank you!

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Questions & Answers
Thank you for attending Streamlining WIC Certification