

Guidelines for Phone Education

MARCH 2024

Suggested procedures for phone education

- **Review participant's chart**
 - How many members of household are current WIC participants?
 - Be sure that you know names of all WIC participants in household.
 - What behavior change/plan/goal was identified or discussed at their last visit?
 - Consider briefly checking in chart if food benefits are being redeemed as expected.
 - Consider if there are any references or referral numbers that you might need or referrals made at last visit to ask about.
- **Call participant**
 - Greet participant by name.
 - Introduce self and title/role.
 - Ask if this is a good time to talk.
- **Set agenda**
 - "Today I'd like to follow-up on the discussion you had last time you were here in the WIC office."
 - "After that, we will set an appointment for your next visit to the WIC office and . . ."
 - "I will be adding benefits to your WIC Card."
 - "This should take about 10 minutes . . . but first, do you have any questions for me about WIC or healthy eating?"
- **Offer nutrition discussion on category related needs as appropriate, each family member**
 - Examples:
 - Women: breastfeeding discussion/preparation in 2nd trimester, Baby Behavior discussion in 3rd trimester, Postpartum Exit counseling at 3 or 6-9 months postpartum.
 - Infants: anticipatory feeding guidance 3 & 6 months.
 - Children: nutrition and feeding related issues if appropriate.
 - Ask permission. "Would it be okay if I share information about _____?"

- **Follow-up on previous plans or goals for each family member, if any.**
 - “I have your WIC record open and last time you were here in the WIC office; it looks like you were interested in _____. Please share with/tell me how that has been going?”
 - Affirm efforts.
 - Explore what might be holding her back from making a change.
 - Explore – offer – explore.
 - Ask permission to suggest any other ideas to try.
 - Determine if any next steps to work on or new goals to set.
 - Again, ask if she has any questions.
 - Summarize conversation and review main points.
- **Assess if any food package changes are needed.**
 - “Do you have any questions about your food package or want to consider any changes?”
- **Schedule the next appointment.**
- **Thank the participant** for their time and ask for any last questions.
- **Document** education provided.
- **Mail, email, or text** any information that you offered the participant.

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