Subject: Nutrition Education Documentation

References: 246.11(e)(4)

Policy: The local agency must document nutrition education in each participant’s certification chart.

Purpose: To help WIC staff consistently follow-up and reinforce education already provided. To ensure that appropriate education is provided for the participant.

Procedures:

Procedures for documenting Initial Education:
- Initial education contacts, which are completed at the certification or recertification appointment, must be documented in the participant’s record. The required components are:
  - Participant name
  - Date the education was provided
  - Topics discussed
  - Prioritize and plan for subsequent visits
  - Name of CPA who provided the education (If documenting in the WIC Information System, the system will automatically record CPA user name)
- Initial education contacts may be documented in one of the following locations:
  - Nutrition Education Tab (with Notes in the WIC Information System as needed)
  - Notes in the WIC Information System
  - Forms in paper chart. Use electronic documentation unless paper documentation facilitates best services. Refer to the first and third points under Guidance.
  - Other options as approved in the local agency Nutrition Education Plan
- For high-risk participants requiring an Individual Nutrition Care Plan (INCP), See High Risk Individual Nutrition Care Plan policy, Section 6.6.

Procedures for documenting Additional Education:
- Options for documenting additional education contacts which are provided on an individual basis:
  - Nutrition Education Tab (with Notes in the WIC Information System as needed)
  - Notes in the WIC Information System
  - Form in the paper chart. Electronic documentation is strongly recommended.
  - Other options as approved in the local agency Nutrition Education Plan
- Options for documenting additional education contacts that are provided in a group setting. (This includes a display board with an educator.)
Nutrition Education Tab in the WIC Information System. (A separate record should be maintained of the class or display topics, content outline, instructor, and dates presented.)

Notes in the WIC Information System – document the date and class title. (A separate record should be maintained of the class or display topics, content outline, instructor, and dates presented.)

Class attendance list for classes or displays – include the topic, content outline, instructor, date of the education, participant’s name and the name of the proxy or caregiver, as appropriate.

Question and Answer sheet – include the participant name and date of education. Use the questions and answers for discussion with an instructor, then file the sheet in the participant’s chart as documentation of attendance or document by another method as described in the local agency Nutrition Education Plan.

- Options for documenting additional education contacts that are self-guided (this includes computer-based nutrition education, viewing a videotape, or participating in a learning center):
  - Nutrition Education Tab in the WIC Information System.
  - Notes in the WIC Information System
  - File a Certificate of Completion in the participant’s chart
  - Form in the paper chart

- Documentation should also include a record of education offered and either missed or refused and the reason the participant did not attend.

Guidance:

- Local agencies are strongly encouraged to use the Nutrition Education Tab in the WIC Information System to help minimize the time and effort needed to document nutrition education. Use of the Nutrition Education Tab enhances the local agency ability to provide consistent education. CPAs are able to follow-up on previous education without “pulling a paper chart”. If the agency uses the tab, all documentation of nutrition education can be completed in the WIC Information System. The tab should be used in conjunction with the Notes function. “Notes” maybe used for Individual Nutrition Care Plans (INCP) documentation and other lengthy narrative notes. For many low-risk participants, documentation of nutrition education in the tab should be sufficient. However, CPAs may write “notes” as needed to record the unique needs of a “low-risk” participant and to facilitate care and follow-up.

- An agency may choose to use a combination of paper and WIC Information System documentation. This may be necessary if another public health program is accessing WIC information. For example, an agency may decide to document infant and child nutrition education contacts in the WIC Information System and document nutrition education contacts with pregnant women on a paper form so the MCH program may access that information. (Keep data privacy requirements in mind.) If combinations of documentation methods are used, the local agency should establish specific documentation procedures and make sure that all CPAs
are aware of the procedures and using them consistently agency-wide. Such consistency will help assure sufficient documentation and facilitate good continuity of care (i.e., enabling another CPA to review the documentation and clearly understand what was covered during the nutrition contact.) **Documentation is required in only one place. Local agencies are strongly discouraged from documenting the same information in multiple places.**