PHONE EDUCATION CHECKLIST

Training and Preparation
☐ Review MOM 6.7: Additional Education
☐ Review Education Choice for Participants Module, phone counseling tips and other training materials
☐ Determine criteria by categories (PG, BF, PP, I, C) and by risks or health conditions
☐ Determine process and create HuBERT calendar accordingly
☐ Review workflow and materials with your staff

Logistics

☐ When: Determine the start date to offer Phone Education Choice
☐ Who: Determine staff roles
  o Who contacts clients and completes phone education?
  O Do you need language line? Or do you have staff speaking the language?
  O Do you have staff with advanced breastfeeding training for PG, BF, and PP women?
  O Do you have RD or a designated high risk CPA for medical formulas and high risk conditions?
☐ How:
  O How will you schedule in HuBERT? (resource column or new appointment type)
  O How will you document the education contact? (note or nutrition education tab)
☐ What:
  O Offer phone education for eligible participants
  O Schedule a phone appointment
  O Explain what to expect, how and when the benefits be issued next time
☐ Alternate Plan:
  O Determine a plan if unable to reach clients
  O Determine a plan if clients show up at clinic for phone appointment

Tips/Reminders

☐ Update phone record at each visit and ask participants to add WIC # in their contact list
☐ Benefits cannot be issued without completing nutrition services
☐ MY MN WIC App: Ensure staff and participants understand the reminder display on MY MN WIC App

Reviewed with your state WIC consultant _____________________________ Date: _________