

Phone Education Checklist

8/2/2022

Training and Preparation

- Review [Section 6.7 Additional Nutrition Education](#)
- Review **Education Choices 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 the Information System calendar accordingly
- Review workflow and materials with your staff

Logistics

- **When:** Determine the start date to offer Phone Education Choice
- **Who:** Determine staff roles
 - Who contacts clients and completes phone education?
 - Who prints and mails benefits?
 - Do you need language line? Or do you have staff speaking the language?
 - Do you have staff with advanced breastfeeding training for PG, BF, and PP women?
 - Do you have RD or a designated high risk CPA for medical formulas and high risk conditions?
- **How:**
 - How will you schedule in the Information System Calendar? (resource column or new appointment type)
 - How will you document the education contact? (note or nutrition education tab)
- **What:**
 - Offer phone education for eligible clients
 - Schedule a phone appointment
 - Explain what to expect, how and when the benefits be issued next time
- **Alternate Plan:**
 - Determine a plan if unable to reach clients
 - 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 nor without verifying address

- MY MN WIC App: Ensure staff and participant understand the reminder display on MY MN WIC App

Reference – Complete Listing of Hyperlinks

[Section 6.7 Additional Nutrition Education](#)

https://www.health.state.mn.us/docs/people/wic/localagency/program/mom/chsctns/ch6/sctn6_7.pdf

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