Guidelines for Phone Education

1. **Review participant’s chart.**
   - How many members of household are current WIC participants? Each participant needs to be addressed during the phone call.
   - 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.

2. **Call participant**
   - Greet her/him by name.
   - Introduce self and title/role.
   - Ask if this is a good time to talk.

3. **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 . . .
   - Issue your benefits.”
   - “This should take about 10 minutes . . . but first, do you have any questions for me about WIC or healthy eating?”

4. **Offer nutrition discussion on category related needs as appropriate.**
   - **Examples:**
     - Women: breastfeeding discussion/preparation in 2\textsuperscript{nd} trimester, Baby Behavior discussion in 3\textsuperscript{rd} 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 __________?”

5. **Follow-up on previous plans or goals, 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.

6. **Repeat step 4 and 5 for any other participants in household.**

7. **Assess if any food package changes are needed.**
   - “Do you have any questions about your food package or want to consider any changes?
   - “We will add benefits to your card today. Check the MY MN WIC app, wiccard.mn.gov or call 1-833-566-5248 for your account balance before shopping.”

8. **Schedule the next appointment** – Stress to participant that it will be an in-person appt.
   - Tell her she will need to bring ______ if the child has a certification appointment.

9. **Thank her for her time** and ask if she has any last questions. “See you in 3 months on ______ at _____ o’clock.” Please call us if you need to reschedule that appointment.”

10. **Document** education provided.

11. **Mail** any printed information that you offered to send her.
    **Reminder** for pilot agencies: Please complete Local Use questions.