

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 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 _____?"
- 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.