



Minnesota WIC Program Phone Counseling Observation Checklist

Directions

The supervisor (or other designated staff) is to observe the trainee conduct at least one phone contact once the trainee successfully reviewed 'Education Choice' information.

The supervisor should assess the trainee against the criteria for each action. Not all the descriptions in the criteria may apply for each observed contact.

The supervisor will review the completed observation checklist with the trainee and follow up on areas that need improvement. The completed checklist should be retained on file per local agency procedures.

Observation Information

Comments

Trainee Name _____

Supervisor's Signature _____

Date _____

**Minnesota WIC Program
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Participant ID: _____

Action	Criteria	Completed	Needs Improvement	N/A	Comments
<p>Staff Preparation Prepares before call is made.</p>	Hubert record reviewed prior to call & pulled up during call.				
	Appropriate pamphlets, educational resources & referrals available for staff to refer to during the call.				
<p>Rapport Building / Customer Service Builds rapport with the participant/parent/guardian by opening the conversation in a warm & inviting manner.</p>	Greet participant/parent/guardian by name.				
	Staff introduces self – including their role/title.				
	Introduces call observer. Ask permission for observer to listen in on call as part of staff training.				
	Asks participant/parent/guardian if good time to talk.				
	Sets the agenda – expected length of call, what is to occur during the call.				
	Asks participant/parent/guardian if she/he has initial questions.				

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<p>Nutrition Education and Follow Up</p> <p>Offers appropriate, relevant, and accurate counseling & advice.</p>	Asks open-ended, relevant questions.				
	Follows up on previous goal or nutrition discussion in an open-ended way, discusses barriers if not met or affirms if met.				
	Offers different topics to discuss based on previous 'note' documentation & participant/parent/guardian's interest. Tailors discussion around interest.				
	Offers education at appropriate moments after collecting all information.				
	Identifies & assigns correct nutrition risk factors (if applicable).				
<p>Supports Messages & Offers Community Resources</p> <p>Encourages success by offering educational materials & referrals.</p>	Identifies appropriate pamphlet or referral & offers to participant/parent/guardian.				
	Explains pamphlet/referral.				
	Asks how participant/parent/guardian would like to receive the pamphlet or referral (such as email or mail).				

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Action	Criteria	Completed	Needs Improvement	N/A	Comments
<p style="text-align: center;">Summarizes Conversation & Supports Next Step/Goal</p> <p>Closes the conversation & reviews main points, offers affirmations, determines next step/goal and sets up next in-person visit.</p>	Asks & discusses next step or goal, explores potential barriers.				
	Wraps up phone nutrition education by summarizing discussion.				
	Discusses/schedules next in-person visit or instructs when to call clinic.				
	Informs participant/parent/guardian that food benefits have been loaded.				
	Ends call by thanking the participant/parent/guardian for their time.				
<p style="text-align: center;">Documentation</p> <p>Documents the phone nutrition education contact properly.</p>	Document nutrition education.				
	High Risk Care Plan completed & contains relevant information, if needed.				
	Pamphlets & referrals sent are appropriately documented.				