
Required Guidance: Remote Certification

Staff must offer both in person and remote certification appointments and let the participant or caregiver decide which option they prefer. Certifications include:

- Initial Certification
- Subsequent Certification

Note: Refer to the PE – Complete Assessment Required Guidance document when completing the assessment for a participant who was presumed eligible.

As part of the American Rescue Plan Act (ARPA) policy waivers allowed by the Food and Nutrition Service (FNS), this policy is in effect from September 1, 2023 until September 30, 2026.

When providing a remote certification, the CPA must:

1. Complete the remote certification using an agency landline phone, agency cell phone or secure video chat.
 - Check with your IT staff or staff at the state WIC office about what electronic methods meet the definition of a secure video chat.
2. Use an interpreter for the contact when bi-lingual staff aren't available to interpret for a participant with Limited English Proficiency (LEP).
 - Document the use of an interpreter service in the participant's file.
 - See the "Use and Interpreter" policy in [Volume 1, Chapter 11 – Assessment](#) for more information.
3. Complete the required elements of a certification as listed in procedure below.
 - Proof of identification, residency and income eligibility are required.
 - Separation of duties between income eligibility and nutrition risk eligibility is required.

Note: When providing an in-person certification follow policies and procedures in [Volume 1, Chapter 18 - Certification](#).

PROCEDURE:

Staff:

A. When making the certification appointment:

1. Inform the person you'll need to see documentation of identification, residency, and income. Offer the following options:
 - a. Share a ProviderOne number and staff verify it returns a positive result.
 - b. Mail the documents to the clinic. Inform the person you'll shred these documents after viewing and that WIC doesn't keep copies.
 - File documents securely until entered in Cascades, then shred immediately after use.
 - c. Have the documents ready to show staff if the person agrees to a secure video chat appointment.
 - d. Send copies using an encrypted email or fax. Inform the person you'll shred hard copy documents after viewing and that WIC doesn't keep copies.
 - e. Bring the documents to the clinic prior to the appointment.
2. Ask if the participant has had any health care appointments recently or will have an appointment prior to the certification appointment.
 - a. Provide the [Measurement and Bloodwork Information Form](#) link to the person so the health care provider can document measurements and bloodwork values.
 - b. Ask the person to access their electronic health record or have an after-visit summary on hand during the certification and verbally share the measurements and bloodwork values.

B. During the certification appointment give a brief description of the program and certification process.

1. Let the participant know the information is confidential and approximately how long the appointment will take.

2. It's best practice to let the participant know you'll ask questions about potentially personal information so they can decide if they're in an area where they can answer these questions.
 3. It's also helpful to let participants know staff will enter the information into a computer so they're aware of what's occurring during this interaction.
- C. Ask where the person heard about WIC at the initial certification for the family.
1. Staff only ask one time for the family when the first person is certified and document the answer on the **Family Assessment** screen in Cascades.
- D. Document all required information on the participant's **Family Demographics** screen.
1. Select the proof shown for identity and residency when the participant or parent guardian provided it prior to or during the certification appointment using one of the options in Procedure A.
 2. Select "Not Provided" when none of the above apply and staff didn't see the person's proof(s) at the certification.
 - Selecting "Not Provided" gives the participant a one-month temporary certification for missing proof of identification and/or residency.
 3. Follow the "Participants with No Proof of Identity or Residency" policy in [Chapter 18 – Certification](#) when proof of identity or residency doesn't exist.
 - Review the [No Proof of Identity Form \(Affidavit for Identity\)](#) and/or the [No Proof of Residency Form \(Affidavit for Residency\)](#) with the participant.
 - Ask if the participant has any questions and if they agree to the information on the form.
 - If the person agrees, write "Read to/ppt agreed" then sign your initials in the **Certification Signature** box.
 4. Ask the adult if they would like information about registering to vote or changing their voter registration address.
 - Document the adult's voter registration status.
 - Offer to mail a stamped voter registration form, or a link to the online registration form when the person is interested in registering to vote.

[Register to Vote in Washington State - Elections & Voting - WA Secretary of State.](#)

- E. Document the required information on the **Participant Demographics** screen.
1. Document participant identification on the Participant Demographics screen if not entered on the Family Demographics screen when adding the participant to the family.
 2. Race/Ethnicity – select the participant’s race and ethnicity based on their declared information.
 3. Physical Presence – select “No” and select the Physical Presence Exception Reason “Remote Appointment.”
- F. Complete the **Income Information** screen to assess income eligibility.
1. Family size – enter the number in the economic unit and the number of expected infants when applicable.
 2. Family Adjunct Participation – enter information and proof seen.
 - a. Verify adjunctive eligibility and enter the estimated self-declared income from the past 30 days.
 3. Income Details – enter information if the participant **doesn’t have** adjunctive eligibility.
 - a. Select the proof of income seen during the certification appointment.
 - b. Select “Not Provided” for proof of income when the participant didn’t provide proof of income at the certification.
 - Selecting “Not Provided” gives the participant a one-month temporary certification for missing proof of income when the self-reported amount is income eligible.
 - c) Complete the [Temporary Certification for Missing Proof of Income form](#) when selecting “Not Provided” for proof of income.
 - 1) Fill in the income information reported by the participant.
 - 2) Verbally share the following information from the form:

- I understand WIC is giving me 1 month to bring in proof of my household income.
- The proof must show I am income eligible for WIC to continue receiving WIC benefits.
- The household income I'm reporting is true and correct to the best of my knowledge.

3) After the participant agrees, write "read to/ppt agrees" then place your initials on the signature line of the form.

4) Scan the form into Cascades from the Income Information screen.

Note: Staff have the option to send a link to the form to the participant.

4. Follow the "No Proof of Income" policy in [Volume 1, Chapter 6 – Income](#) when the person has zero income, or proof of income doesn't exist.

- Review the [Statement of Income Form \(Affidavit for Income\)](#) with the participant.
- Ask if the participant has any questions and if they agree to the information on the form.
- If the person agrees, write "Read to/ppt agreed" then sign your initials in the **Certification Signature** box.

5. Provide the "Not Eligible" letter if the person isn't income eligible for WIC and provide referrals to other social and health services.

G. Obtain and document measurements and bloodwork values when possible.

1. Make and document concerted efforts to get referral data for measurements and bloodwork values. Concerted efforts may include the following:

- a. Provide the [Measurement and Bloodwork Information Form](#) to participants to obtain measurements and bloodwork values from their health care provider to share with WIC.
- b. Ask if the person has access to their electronic medical record (for example a Patient Portal or "My Chart") and ask them to verbally share the measurements in their electronic medical record.

Note: It's important for the person to only share measurements directly from the electronic health record, or those documented by the provider to assure staff enter accurate measurements in the participant's file.

- c. Obtain the values when staff have access to a participant's medical records.
- d. Offer in-clinic measurement and bloodwork days, or appointments.
- e. Explore Data Sharing Agreements (DSA) with programs (e.g. Early Head Start, MSS, home visiting programs, etc.) to get values from other programs or the participant's health care provider.
 - If your agency has a DSA in place, provide a written notification letter in the participant's preferred language. The notification letter can be mailed, emailed, or sent via text based on the participant's preference.
 - See [Volume 1, Chapter 25 – Legal Considerations and Confidentiality](#) for more information about DSAs.
- f. Provide the [Individual Authorization to Release WIC Information form](#) so WIC staff can contact the Medical Provider listed in Cascades to obtain these values.

- 2. Document efforts to obtain measurement and bloodwork values in the participant's file as a Family Alert.
- 3. Document measurements and bloodwork values, when available.
 - a. Document measurements from another source if taken within 60 days of the certification.
 - b. Document the bloodwork value from another source taken in the participant's current category and within 90 days of the certification.

Note: Be sure to change the source of measurements and the date taken to reflect where and when the measurements were taken.

- c. Although staff don't have to schedule monthly appointments when the measurements or bloodwork values aren't available, staff are required to

follow-up within 60 days to see if measurements and bloodwork values are available.

- Assess the measurements and bloodwork values and share information about prenatal weight, or infant and child growth.
- Assign risks as needed and assure the next appointment is appropriate.
- Assure the correct foods are prescribed.
- Provide appropriate nutrition education and referrals.

- H. Ask the required (**bold**) Assessment Questions for the participant's category and age.
- a. Ask if the participant is in a safe, confidential place. Don't ask the Domestic Violence/Safety question when the participant doesn't confirm they are in a safe or confidential place when providing remote services.
- Document "didn't ask due to safety concerns" in the field next to this Assessment Question on the **Family Assessment** screen when it applies.
 - Follow guidance in the "[Domestic Violence Assessment Question during Remote Services](#)" policy for risk assessment, referrals and resources.
 - Share with all new participants, the domestic violence referral information on the WIC ID and Card Folder.
- b. Promote breastfeeding to pregnant participants by exploring questions and concerns about breastfeeding.
- Offer information to address concerns and document in participant's file.
 - Offer breastfeeding peer support if available.
- c. Document answers to questions in the participant's file
- I. Assign all appropriate risk factors.
- J. Complete the Rights and Responsibilities form.
1. Ask the participant if they have access, by phone or on a computer, to read the [Rights and Responsibilities form](#) on the Washington WIC website, **or** read the entire form to the participant.

- Direct the participant to the [Rights and Responsibilities form](#) in their language, read the form to the person in their language, or ask the interpreter or Language Line staff to read the form to the person in their language.
 - 2. Once the participant has read or had the Rights and Responsibilities form read to them, verbally review the required information on the form and ask if the person has any questions and if they agree.
 - See [Volume 1, Chapter 7 – Rights and Responsibilities](#) for more information about the required review.
 - 3. If the participant agrees to the Rights and Responsibilities, click **Capture Signature** and write “Read to/ppt agreed” then sign your initials in the **Certification Signature** box.
- K. Review the information on the **Certification Summary** screen and if the information is correct, press the **Certify** button.
- 1. Let the participant, Parent Guardian or Caretaker know how long the participant is eligible for WIC.
 - Share with the participant when they receive a one-month temporary certification for missing proof(s) that they must provide the proof(s) showing WIC eligibility to receive additional benefits.
 - 2. Share that WIC will reassess the participant’s eligibility at the end of the certification period.
- L. Have a conversation and set goals with the participant, Parent Guardian, or Caretaker as appropriate.
- M. Offer nutrition education and referrals based on the dietary and health assessment, the participant’s interests, relevant concerns or needs.
- N. Issue the WIC Card.
- 1. Swipe the WIC Card or enter the WIC Card number on the **Issue EBT Card** screen.
- O. Prescribe food benefits.
- 1. Share information about WIC foods and how they contribute to a healthy diet.

2. Let the participant, Parent Guardian, or Caretaker know WIC foods are for the participant and alone won't meet all the nutritional needs of the participant. WIC is a supplemental food program.
 - See [Volume 1, Chapter 23 – WIC Foods](#).
- P. Issue food benefits.
 1. Issue food benefits for the appropriate number of months (1, 2 or 3 months of issuance) based on required documentation and next appointment needs.
 2. Staff sign for the food benefits by writing "RBI" (Remote Benefit Issuance) and their initials.
- Q. Provide WIC shopping education and information about how to use the WIC Card.
 1. Ask if the participant can download and view the [WIC Shopping Guide](#) on the WIC website to see the foods while staff review them on the phone or during the video chat.
 2. Encourage the participant to consider downloading the WIC Shopper App.
- R. Offer new participants the option to mail the WIC Card or have the participant pick the card up at the clinic.
 1. Let the participant know the card may take 5 – 7 days to arrive by mail.
 2. If the participant prefers staff mail the card:
 - a. Confirm the address in the participant's file is correct.
 - b. Offer a Shopping List, Shopping Guide, and other WIC Card materials as needed.
 - Delete all shopping lists from the Downloads folder after generating reports or printing a Shopping List in Cascades.
 - c. Send the card, the Mailed Card Letter, and other requested materials in the participant's language. The letter is available on the [WIC Policies and Procedures page](#).
- S. Schedule the participant's next appointment based on their needs and if follow-up is needed for missing documentation or measurement and bloodwork values.

- T. Let the participant, Parent Guardian, or Caretaker know:
1. What to provide at (or before) the next appointment, for example missing proof(s), current measurements, or iron test results.
 2. They can transfer their WIC eligibility if they move.
- U. Thank the participant for participating in WIC and offer a phone number for questions.
- V. Document the certification appointment and nutrition education according to the [“Nutrition Education at the Initial and Subsequent Certification and Presume Eligible Complete Assessment”](#) policy in the participant’s Individual Care Plan.
- Title the Care Plan note as “Remote Certification.”

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