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| --- | --- | --- |
| 1. Participation | Yes/No | Comments |
| 1. Review Monthly Participation and Participation to Enrollment percentages:    1. Monthly Reports from CNSS    2. [Real Time Participation in Crossroads](https://www.ncdhhs.gov/localagencyaccessreports-051719pdf/download?attachment) |  |  |
| 1. Evaluate Data and Assess Trends |  |  |
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Instructions: Review each area and evaluate if your agency is currently implementing the suggested strategies. In the comments section, include details regarding how your agency is currently implementing or has implemented the strategy in the past. Tally the number of “Yes” responses at the bottom. Identify strategies your agency is not using and consider developing a plan to implement.

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| * + 1. Show Rate | Yes/No | Comments |
| 1. Appointment Reminders 2. Calls 3. [Texts](https://www.ncdhhs.gov/teletaskmessagingresource052022pdf/download?attachment) 4. [Autodialer](https://www.ncdhhs.gov/teletaskautodialer-010720pdf-0/download?attachment) |  |  |
| 1. Evaluate show rates using the [Participant Appointment Show Rate Report](https://www.ncdhhs.gov/schedulingreportsresource-050115pdf/download?attachment) |  |  |

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| * + 1. Participant Retention | Yes/No | Comments |
| 1. Work the [Detailed and Summary Participants Who Failed To Pick Up Benefits Report](https://www.ncdhhs.gov/crossroadsreportstraininghandoutpdf/download?attachment) at least monthly |  |  |
| 1. Work the [Summary of Actions Due Listing Details Report](https://www.ncdhhs.gov/crossroadsreportstraininghandoutpdf/download?attachment) monthly |  |  |
| 1. Follow up with Missed Appointments daily 2. Call 3. [Text](https://www.ncdhhs.gov/teletaskmessagingresource052022pdf/download?attachment) 4. [Letters](https://www.ncdhhs.gov/printingmissedappointmentnotifications-042114pdf/download?attachment) |  |  |

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| * + 1. Scheduling | Yes/No | Comments | |
| 1. Utilizing Scheduling Best Practices |  |  | |
| 1. Assessing [Templates](https://www.ncdhhs.gov/3-templateresourcepdf/download?attachment) |  |  | |
| 1. Accepting Walk-in |  |  | |
| 1. Extending Certifications |  |  | |
| 1. Utilizing [Temporary Eligibility for Pregnant Women](https://www.ncdhhs.gov/riskcode503-010720pdf/download?attachment) |  |  | |
| 1. Offer Walk-in Lab Appointments |  |  | |
| 1. Overbooking |  |  | |
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| * + 1. Waivers and Allowances | Yes/No | Comments | |
| 1. Utilize [ARPA Waivers](https://www.ncdhhs.gov/remote-services-toolkit/download?attachment) |  |  | |
| 1. Offer [WICHealth.org](https://ncnutrition.adobeconnect.com/ptgz44kwflsx) |  |  | |
| 1. Offer mini-lessons via phone |  |  | |
| 1. Utilize MyWICPortal |  |  | |
| 1. Exhaust [allowable proofs](https://www.ncdhhs.gov/chapter6a102021pdf/download?attachment) and accept digital proofs |  |  | |

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| * + 1. Customer Service | Yes/No | Comments |
| 1. Review the agency’s website to ensure it includes: 2. Correct contact information 3. WIC service email 4. Up-to-date WIC Program information 5. Referral link |  |  |
| 1. [Evaluate phone system](https://ncnutrition.adobeconnect.com/pn7qjwp2ajz3/) to ensure participants can easily reach a live person |  |  |
| 1. Respond to text in a timely manner |  |  |
| 1. All staff have access to [Teletask](https://www.ncdhhs.gov/teletasktwowaytextingresource051922pdf/download?attachment) |  |  |

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| * + 1. [Outreach](https://www.ncdhhs.gov/divisions/child-and-family-well-being/community-nutrition-services-section/wic/staff/outreach#LocalAgencyRetentionandOutreachTools-3600) | Yes/No | Comments |
| 1. Develop Targeted Outreach |  |  |
| 1. Strengthen Internal Referrals |  |  |
| 1. Strengthen External Referrals |  |  |
| **Tally the Number of Yes Responses** |  |  |