Guidance for Completing the WIC Program Digital Monitoring Tool

Objective: Support utilization of the WIC Program Digital Monitoring Tool to document a monitoring

Instructions: Download the document and save to your device. From that saved document, fill out the information at the top of the WIC Program Monitoring Tool (Part 1 or Part 2):

Internet Explorer does not allow download of the digital tool. If available, recommend using Mozilla Firefox to download the document.

Local Agency:	
Date of Review:	
Review Team:	
Site(s) Reviewed:	

You will notice that the format of the Area of Review digital monitoring tool is identical to that of a printed monitoring tool. Within the "Reviewer's Notes" column, one is free to type notes. Document in the review notes of the review areas as needed.

> *Note: Applicant and participant identifying information must not be documented in the working papers nor cited in verbal or written reports of findings.*

The "Status" column presents drop-down options that are indicated
in the legend on the bottom of the monitoring tool pages. These status options include:

- N/A=Not applicable
- 3=Meets minimum standards; Satisfactory
- 2=Meets minimum standards most of the time; needs improvement; Suggestion
- 1=Does not meet minimum standards; Finding

Once a conclusion is made about a review area, select the appropriate status from the drop-down list.

Status**

N/A
3=Meets minin
2=Meets minin
1=Does not me

**Part I: Administrative Services Review**

Table 1.1

1. Enter the participant's family ID. (The font size decreases as necessary based on the information entered into the field).

2. Under WIC Category, select the appropriate participant category from the drop-down list:

2.	WIC Category	
3.	Date created (family demographics screen)	Pregnant
4.	Days past processing standards	Postpartum
5.	Reason appointment is outside of processing standards	Breastfeeding
6.	Scheduled appointment date / or walk-in policy	Infant
7.	Documentation of F/U for missed appointments	Child
	• Required for all categories	
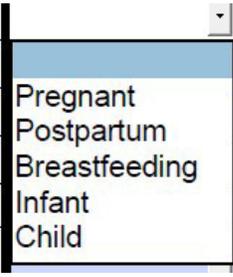
3. For reasons outside of processing standards and documentation of F/U for missed appointments, select the appropriate code from the drop-down list:

```
N/A
✓
M
I
```
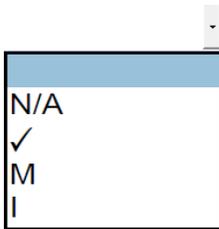
Code for Table: N/A= Not Applicable ✓=Present M=Missing I=Incomplete

Table 4.2

1. Enter the vendor name/number and select the appropriate code from the drop-down list.
   Code for Table: N/A=Not Applicable ✓=Present M=Missing I=Incomplete

```
N/A
✓
M
I
```
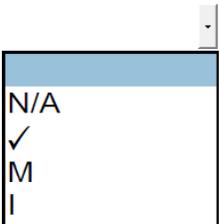
Part II: Nutrition Services Review

After the agency, site reviewed, date and reviewer's information are filled-in on one Appendix of the Monitoring Tool, the information is automatically transferred to all six appendices.

For Appendices 1, 2, and 3, enter the participant's family ID, date of birth, and date of certification.

- The date of birth and date of certification can be entered manually OR using the calendar when pressing the drop-down arrow.

  Date of Birth:

- Select the appropriate code from the drop-down list for items 3-15:

  Code for Table: N/A=Not Applicable √=Present M=Missing I=Incomplete

Appendices 2 and 3

1. Follow the same guidance as above when completing the appendices. Since there may be more than one potential response when selecting M or I, it is recommended that one types the number beside the code, then utilize the second page available for notes to document as needed.
See example below:

2. For nutrition risk criteria, enter the codes manually.

    o   The font size decreases as necessary based on the information entered into the field.

Appendices 4, 5 and 6

Follow the same guidance as above for entering data.

Record Retention and Disposition of Electronic Documents

The Local Agency must retain on file monitoring documents (see Chapter 15 of the WIC Program Manual) in accordance with DHHS Office of the Controller as outlined in Chapter 13 of the WIC Program Manual. After the local agency has completed a Local Agency Self-assessment (LASA) review, file all monitoring documents in a secure and retrievable location in the local agency.

If supporting documentation is requested from the Community Nutrition Services Section, a digital format can be shared in a confidential and secure manner such as utilizing encrypted email. If the local agency does not have the ability to email the documentation in a confidential and secure manner, please contact your Regional Nutrition Consultant for guidance.