



## State and Local Agency Review Tool – Clinic Observation Scale

<b>Scale Rubric for Observations:</b>					
<b>Areas Rated</b>		<b>(0)= Required Action</b>	<b>(1) = Needs Attention</b>	<b>(2) =Meets Requirements</b>	<b>(3) =Exceeds Requirements</b>
<b>1.</b>	<b>Determine WIC Eligibility</b>	<b>Limited Skills or Action Not Observed</b>	<b>Requires More Training</b>	<b>Completes the required actions and demonstrates solid skill level</b>	<b>Completes the required actions and demonstrates skill level that exceeds those required actions.</b>
❖	Cordial Introduction	<ul style="list-style-type: none"> <li>▪ Has minimum interaction with participant.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Staff introduces themselves to the participant.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Polite and friendly.</li> <li>▪ Greets participants by name.</li> <li>▪ Staff introduces themselves.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Polite and friendly.</li> <li>▪ Greets participants by name.</li> <li>▪ Staff introduces themselves.</li> <li>▪ Walks beside them and chats with participants while taking them back to get services instead of walking ahead of them (if applicable).</li> <li>▪ Staff offers to carry participants belongings back to counseling rooms.</li> </ul>
❖	Household size determination			<ul style="list-style-type: none"> <li>▪ Household size is accurately determined.</li> <li>▪ Definition of household size is explained to family.</li> <li>▪ Further questions are asked of applicant to ensure accurate number is documented.</li> <li>▪ Applicant is given opportunity to ask questions.</li> </ul>	
❖	Income determination			<ul style="list-style-type: none"> <li>▪ Income is accurately determined.</li> <li>▪ Certifier explained what must be counted as income.</li> <li>▪ Appropriate documentation was observed.</li> <li>▪ Appropriate calculations completed by certifier.</li> <li>▪ Income is collected in a confidential manner.</li> <li>▪ Applicant is given the opportunity to ask questions.</li> </ul>	



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❖ Identity and Residency confirmation			<ul style="list-style-type: none"> <li>▪ Physical copy of proof of ID and residency is observed using allowable form.</li> </ul>	
❖ Separation of Duties			<ul style="list-style-type: none"> <li>▪ One certifier collects income eligibility in a confidential manner and another determines nutrition risk criteria.</li> <li>▪ If the same certifier collects both income and nutrition risk the correct post review is completed within the time requirements.</li> </ul>	
❖ Proof of pregnancy			<ul style="list-style-type: none"> <li>▪ Proof of pregnancy is requested if applicant is not visibly pregnant.</li> <li>▪ Appropriate proof is collected when applicable (EDC written by medical care provider or a copy of an ultrasound with an EDC).</li> </ul>	
❖ Ineligibility requirements			<ul style="list-style-type: none"> <li>▪ If applicant does not meet one or more of the qualifying eligibility requirements a Letter of Ineligibility is given.</li> <li>▪ The Responsible Adult signs the Letter of Ineligibility and is provided a copy of the letter.</li> <li>▪ A copy of the Letter of Ineligibility, the application (If applicable) and other certification documentation are kept on file for four years.</li> </ul>	



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❖ Rights, Responsibilities and Consent	<ul style="list-style-type: none"> <li>▪ Participant not given form to review.</li> <li>▪ Staff asks if participant reviewed form.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Discusses consent for anthropometric, biochemical data and contacting participant (voicemail, text).</li> <li>▪ Signature obtained. Includes authorized signer or proxy if applicable.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Discusses consent for anthropometric, biochemical data and contacting participant (voicemail, text).</li> <li>▪ The FNS approved statements (5 bullets located above the signature) are read to or by the applicant.</li> <li>▪ Certifier says the three required statements on the Rights, Responsibilities and Consent form.</li> <li>▪ Signature obtained. Includes authorized signer or proxy if applicable.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Discusses consent for anthropometric, biochemical data and contacting participant (voicemail, text). The FNS approved statements (5 bullets located above the signature) are read to or by participant.</li> <li>▪ Certifier says the three required statements on the Rights, Responsibilities and Consent form.</li> <li>▪ Signature obtained. Includes authorized signer or proxy if applicable.</li> <li>▪ Provided opportunity to ask questions.</li> </ul>	
<b>2.</b>	<b>Anthropometric Assessment</b>	<b>(0)= Required Action</b>	<b>(1) = Needs Attention</b>	<b>(2) =Meets Requirements</b>	<b>(3) = Exceeds Requirements</b>
❖ Procedure explanation	<ul style="list-style-type: none"> <li>▪ Procedures not explained.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Little to no explanation of procedure to participant.</li> <li>▪ Incorrect explanation of procedures.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Explanation of procedure, for example, “We collect measurements to help us track changes in growth or discover potential nutritional risk.”</li> </ul>	<ul style="list-style-type: none"> <li>▪ Explanation of procedure, for example, “We collect measurements to help us track changes in growth or discover potential nutritional risk, we ask that articles of clothing and shoes are removed to record the most accurate numbers.”</li> <li>▪ Answers questions about procedures.</li> </ul>	
❖ Height/Length and weight technique	<ul style="list-style-type: none"> <li>▪ Measurements not collected.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Incorrect instrument used for age.</li> <li>▪ Not postponing procedure despite restless or moving child interfering with accurate collection of data.</li> <li>▪ Recording/Reading error.</li> <li>▪ Clothing, diaper, shoes, hats etc. not removed.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Correct instrument used for age.</li> <li>▪ Weight:               <ul style="list-style-type: none"> <li>• Scaled zeroed and balanced.</li> </ul> </li> <li>▪ Height:               <ul style="list-style-type: none"> <li>• Standing height for children over 24 months &amp; women.</li> <li>• Recumbent Infant and children under 24 months.</li> </ul> </li> <li>▪ Procedure postponed for restless or moving child</li> </ul>	<ul style="list-style-type: none"> <li>▪ Correct instrument used for age.</li> <li>▪ Weight:               <ul style="list-style-type: none"> <li>• Scaled zeroed and balanced.</li> </ul> </li> <li>▪ Height:               <ul style="list-style-type: none"> <li>• Standing height for children over 24 months &amp; women.</li> <li>• Recumbent Infant and children under 24 months.</li> </ul> </li> <li>▪ Procedure postponed for restless or moving child interfering with accurate collection of data.</li> <li>▪ If data collection postponed, asks if medical office has recent information for past 60 days.</li> </ul>	



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		<ul style="list-style-type: none"> <li>Equipment not operated correctly.</li> </ul>	<ul style="list-style-type: none"> <li>interfering with accurate collection of data.               <ul style="list-style-type: none"> <li>Recording/Reading correctly.</li> <li>Clothing, diaper, shoes, hats etc. removed when appropriate (dry diaper and light tee-shirt or onesie allowable).</li> <li>Equipment operated correctly.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Recording/Reading correctly.</li> <li>Clothing, diaper, shoes, hats etc. removed when appropriate (dry diaper and light tee-shirt or onesie allowable).</li> <li>Equipment operated correctly.</li> <li>Used techniques to distract child and make procedure pleasant such as pictures on the wall or having mom go on the scale first as an example.</li> <li>Affirms participant.</li> </ul>	
❖ Sanitation	<ul style="list-style-type: none"> <li>No sanitary technique or disposal used.</li> </ul>	<ul style="list-style-type: none"> <li>Incorrect cleaning materials used for visibly soiled areas or equipment.</li> </ul>	<ul style="list-style-type: none"> <li>Follows manufactures recommendations to maintain equipment.</li> <li>Correct sanitary technique and disposal for visibly soiled areas or equipment.</li> </ul>	<ul style="list-style-type: none"> <li>Follows manufactures recommendations to maintain equipment.</li> <li>Correct sanitary technique and disposal for visibly soiled areas or equipment.</li> <li>Documentation in a cleaning log.</li> <li>Keeps work area clean, attractive and orderly.</li> </ul>	
<b>3.</b>	<b>Hematologic Assessment</b>	<b>(0)= Required Action</b>	<b>(1) = Needs Attention</b>	<b>(2) =Meets Requirements</b>	<b>(3) = Exceeds Requirements</b>
❖ Procedure explanation	<ul style="list-style-type: none"> <li>Procedures not explained.</li> </ul>	<ul style="list-style-type: none"> <li>Minimal explanation of procedure.</li> <li>Incorrect explanation of procedure.</li> <li>Inappropriate comments used such as “be a big boy.”</li> </ul>	<ul style="list-style-type: none"> <li>Brief explanation of procedure, for example, “The hemoglobin test is done to measure the amount of red blood cells or the amount of iron in your blood.”</li> </ul>	<ul style="list-style-type: none"> <li>Explained procedure, For example, “The hemoglobin test is done to measure the amount of red blood cells or the amount of iron in your blood. Low levels of iron in the blood can affect the health of you and your child. It is easy to measure the hemoglobin.”</li> <li>Discusses what will happen if lab is low, for example “If it’s low we’ll talk about some easy ways to correct it by eating more iron-rich foods.”</li> <li>Shows participant the instrument while discussing, for example, “I will take a few drops of blood from your finger and fill this cuvette.” (Show client the cuvette.) “Then I’ll put the</li> </ul>	



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				cuvette in the machine so the hemoglobin level can be read.”	
❖ Hgb or hct technique	<ul style="list-style-type: none"> <li>Labs not collected.</li> </ul>	<ul style="list-style-type: none"> <li>Excess squeezing or pressure of finger (or toe).</li> <li>Not wiping off the alcohol before puncturing the skin.</li> <li>Not getting a good finger stick (for ex. Cold hands).</li> <li>Failure to wipe off the first drop of blood.</li> <li>Not getting enough blood in the cuvette.</li> <li>Recording error.</li> </ul>	<ul style="list-style-type: none"> <li>Finger (toe) site cleaned with alcohol.</li> <li>First two (or three) drops of blood wiped away.</li> <li>Finger pressed gently, not milked.</li> <li>Obtains enough blood to test.</li> </ul>	<ul style="list-style-type: none"> <li>Finger (toe) site cleaned with alcohol.</li> <li>First two (or three) drops of blood wiped away.</li> <li>Finger pressed gently, not milked.</li> <li>Obtains enough blood to test.</li> <li>Used techniques to distract child and make procedure pleasant such as stickers or toys.</li> <li>Affirms participant.</li> </ul>	
❖ Sanitation	<ul style="list-style-type: none"> <li>No sanitary technique or disposal used.</li> </ul>	<ul style="list-style-type: none"> <li>Gloves used without washing hands first.</li> <li>Does not practice sanitary techniques when collecting hgb for multiple family members.</li> <li>Incorrect disposal of used materials.</li> </ul>	<ul style="list-style-type: none"> <li>Washes hands (or uses alcohol-based hand sanitizer).</li> <li>Gloves used.</li> <li>Practices sanitary techniques when collecting hgb for multiple family members.</li> <li>Disposes of used materials appropriately.</li> </ul>	<ul style="list-style-type: none"> <li>Washes hands (or uses alcohol-based hand sanitizer).</li> <li>Gloves used.</li> <li>Disposed of used materials appropriately.</li> <li>Keeps work area clean, attractive and orderly.</li> </ul>	
❖ Value explained	<ul style="list-style-type: none"> <li>No explanation.</li> </ul>	<ul style="list-style-type: none"> <li>Tells participant the value.</li> </ul>	<ul style="list-style-type: none"> <li>Tells participant the value.</li> <li>Explains a healthy range for this value.</li> </ul>	<ul style="list-style-type: none"> <li>Tells participant the value.</li> <li>Explains a healthy range for this value.</li> <li>Discusses education will be given if value is low.</li> <li>Affirms participant.</li> </ul>	
<b>4.</b>	<b>Health/Nutrition Information Questionnaire</b>	<b>(0)= Required Action</b>	<b>(1) = Needs Attention</b>	<b>(2) =Meets Requirements</b>	<b>(3) = Exceeds Requirements</b>
		<ul style="list-style-type: none"> <li>Little to no engagement between staff</li> </ul>	<ul style="list-style-type: none"> <li>Minimal engagement between staff</li> </ul>	<ul style="list-style-type: none"> <li>Staff member engages participant.</li> </ul>	<ul style="list-style-type: none"> <li>Staff member engages participant.</li> <li>Courteous, doesn’t interrupt when participant is speaking.</li> </ul>



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<ul style="list-style-type: none"> <li>❖ Listened actively and allowed time for participant to talk.</li> <li>❖ Collected missing information from questionnaire</li> <li>❖ Validated participants concerns while collecting information.</li> </ul>	<p>member and participant.</p>	<p>member and participant.</p> <ul style="list-style-type: none"> <li>▪ Asks unproductive questions.</li> <li>▪ Unintentional judgmental responses used.</li> <li>▪ Asks closed-ended yes or no questions.</li> <li>▪ Misses information/questions from assessment.</li> <li>▪ Inappropriately determines risk factors.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Courteous, doesn't interrupt when participant is speaking.</li> <li>▪ Asks appropriate questions.</li> <li>▪ Avoids judgmental responses.</li> <li>▪ Asks open ended and directive questions.</li> <li>▪ Obtains answers to all assessment questions.</li> <li>▪ Acknowledges concerns.</li> <li>▪ Risk factors determined correctly.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Asks appropriate questions.</li> <li>▪ Avoids judgmental responses.</li> <li>▪ Helps the person identify her/his feelings.</li> <li>▪ Reassures the person that her/his feelings are okay.</li> <li>▪ Asks open ended and directive questions.</li> <li>▪ Obtains answers to all assessment questions.</li> <li>▪ Acknowledges and addresses participants concern.</li> <li>▪ Risk factors determined correctly.</li> </ul>	
<b>5.</b>	<b>Counseling and Education</b>	<b>(0)= Required Action</b>	<b>(1) = Needs Attention</b>	<b>(2) =Meets Requirements</b>	<b>(3) = Exceeds Requirements</b>
<ul style="list-style-type: none"> <li>❖ Counseling and education</li> <li>❖ Offered nutrition related handouts</li> <li>❖ Second nutrition education</li> </ul>	<ul style="list-style-type: none"> <li>▪ No education or handouts provided.</li> <li>▪ Second education not discussed.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Starts education at inappropriate times.</li> <li>▪ Too many topics discussed or handouts provided.</li> <li>▪ Topics pre-determined.</li> <li>▪ Doesn't offer to discuss topics based on assessment.</li> <li>▪ Not enough time spent on education.</li> <li>▪ If handout is used: Handout given with little or no discussion.</li> <li>▪ Second education presented as check pick-up.</li> <li>▪ Non-nutrition/exercise related topics</li> </ul>	<ul style="list-style-type: none"> <li>▪ Education provided after assessment completed.</li> <li>▪ Limits topics and handouts (if used) to 1-2 at most.</li> <li>▪ Discusses second nutrition education.</li> <li>▪ Offers second nutrition education.</li> <li>▪ Schedules second education.</li> <li>▪ Adequate time spent on education.</li> <li>▪ If handout is used: Handouts discussed, not just provided.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Relevant education provided after assessment completed.</li> <li>▪ When topics/questions asked by participant, staff member acknowledged that will be discussed after they have collected information, for example "that's a great question, I would enjoy discussing that with you after collecting more information to provide individualized information for you and your family."</li> <li>▪ Limited topics and handouts (if used) to 1-2 at most.</li> <li>▪ Second relevant nutrition education is offered, appropriate options provided for individual, group etc.</li> <li>▪ Second nutrition education is discussed, not presented as check pick-up alone. For example, staff may say "You have checks until (<i>month</i>). In (<i>month</i>) we will follow-</li> </ul>	



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		offered as education/handout.		<p>up on how you (<i>and/or other family members</i>) are doing, discuss any areas of interest or concern and issue your next set of checks.” Or “You have checks until (<i>month</i>). In (<i>month</i>) we will have you follow-up with a Dietitian to see how you (<i>and/or other family members</i>) are doing. Meeting with the Dietitian will be a good opportunity to discuss (<i>Why they are meeting with RD and services they will receive from the RD</i>).”</p> <ul style="list-style-type: none"> <li>▪ Scheduled and/or written on WIC folder as reminder.</li> <li>▪ Adequate time spent on education.</li> <li>▪ If handout used: Handouts relevant and discussed, not just provided.</li> </ul>
❖ Growth chart or prenatal weight gain grid and Hemoglobin is explained in a non-judgmental manner	<ul style="list-style-type: none"> <li>▪ No explanation of values.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Unintentional judgmental responses used.</li> <li>▪ Inaccurate explanation of growth chart.</li> <li>▪ Discusses growth chart, may not be in an easily understood manner.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Discussed in a non-judgmental manner.</li> <li>▪ Discusses potential reasons for out of range values.</li> <li>▪ Discusses growth chart.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Discussed in a non-judgmental manner.</li> <li>▪ Ask for more information to provide explanation for out of range values such as “have you made any changes to your diet since pregnancy?”</li> <li>▪ Discussed in an easily understood manner such as “Growth charts tell how each child’s measurements compare with a sample of 100 children of the same gender and age.”</li> </ul>
❖ Pregnant/Postpartum women were encouraged to breastfeed.	<ul style="list-style-type: none"> <li>▪ No discussion of breastfeeding.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Minimal discussion.</li> <li>▪ Asks if breastfeeding, no information or encouragement.</li> <li>▪ Referrals not given when applicable.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Encourages all women to breastfeed unless contraindicated for medical reasons.</li> <li>▪ Provides education and information if applicable to pregnant and postpartum women.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Encourages all women to breastfeed unless contraindicated for medical reasons.</li> <li>▪ Provides education and information if applicable such as positioning, preventing problems, managing breastfeeding when returning to work or school, and expressing and storing breast milk.</li> </ul>



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			<ul style="list-style-type: none"> <li>▪ Follows their local agency's plan for promoting and supporting breastfeeding.</li> <li>▪ Handouts provided if applicable.</li> <li>▪ Referrals as needed.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Follows their local agency's plan for promoting and supporting breastfeeding.</li> <li>▪ Continues to provide education and support during the postpartum period.</li> <li>▪ Identifies breastfeeding problems and makes referrals as needed.</li> <li>▪ Handouts provided if applicable.</li> </ul>	
❖ Referrals	<ul style="list-style-type: none"> <li>▪ No referrals provided.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Provides referrals before the nutrition assessment has been completed.</li> <li>▪ Referrals provided, not all appropriate or missing.</li> <li>▪ Appropriate referrals provided orally or written, not both.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Provides referrals after the nutrition assessment has been completed.</li> <li>▪ Referrals are appropriate.</li> <li>▪ All applicable referrals provided.</li> <li>▪ Provides referrals both verbally and written.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Provides referrals after the nutrition assessment has been completed.</li> <li>▪ Referrals are appropriate.</li> <li>▪ All applicable referrals provided.</li> <li>▪ Provides referrals both verbally and written.</li> <li>▪ Discusses referrals, how they can help, where to find more information, or why they were referred.</li> <li>▪ Plan to follow-up on referrals at next visit.</li> </ul>	
<b>6.</b>	<b>Participant Centered Services (PCS)</b>	<b>(0)= Required Action</b>	<b>(1) = Needs Attention</b>	<b>(2) =Meets Requirements</b>	<b>(3) = Exceeds Requirements</b>
❖ Sets the agenda	<ul style="list-style-type: none"> <li>▪ Agenda not set.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Discusses length of visit.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Discusses how long the appointment is and what they plan to accomplish.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Sets the agenda for the appointment.</li> <li>▪ Discusses how long the appointment is, what they plan to accomplish and acknowledges personal questions.</li> <li>▪ Asks permission to proceed.</li> <li>▪ Affirms participant.</li> </ul>	
❖ Establishes rapport	<ul style="list-style-type: none"> <li>▪ Little to no establishment of rapport.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Greets their participant.</li> <li>▪ Provides minimal information.</li> <li>▪ Information may not be up to date or accurate.</li> <li>▪ Breaches confidentiality or privacy.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Greets each participant with a smile and a friendly hello.</li> <li>▪ Respects others cultures.</li> <li>▪ Provides up to date and accurate information.</li> <li>▪ Respects others time.</li> <li>▪ Maintains confidentiality and privacy.</li> <li>▪ Understanding, not judgmental.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Greets each participant with a smile and a friendly hello.</li> <li>▪ Respects others cultures.</li> <li>▪ Interacts with sensitivity towards different personality types.</li> <li>▪ Provides up to date and accurate information.</li> <li>▪ Respects others time.</li> <li>▪ Maintains confidentiality and privacy.</li> <li>▪ Creates a friendly clinic environment.</li> <li>▪ Understanding, not judgmental.</li> </ul>	



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			<ul style="list-style-type: none"> <li>▪ Provides good customer service.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Provides good customer service.</li> <li>▪ Conveys to WIC participants that staff cares about them and their family and are there to help.</li> <li>▪ Shares personal experiences briefly.</li> </ul>
<ul style="list-style-type: none"> <li>❖ Asks open-ended &amp; probing questions</li> </ul>	<ul style="list-style-type: none"> <li>▪ Little to no questions asked by staff member.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Asks closed-ended yes or no questions.</li> <li>▪ Staff doesn't seek more information when limited information is provided by participant.</li> <li>▪ Questions asked in a judgmental way.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Staff asks open-ended questions starting with who, what, where, when, why, or how that can't be answered with a simple "yes" or "no" most of the time.</li> <li>▪ Staff asks further questions when limited information is provided by the participant.</li> <li>▪ Questions asked in a neutral way.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Staff ask open-ended questions starting with who, what, where, when, why, or how that can't be answered with a simple "yes" or "no".</li> <li>▪ When further information is needed from the participant, staff seeks more information by asking questions that request further explanation on a particular point, for example, "Can you tell me more details?"</li> <li>▪ Questions asked in a way that is inviting and accepting.</li> </ul>
<ul style="list-style-type: none"> <li>❖ Actively listens, supports participant talk time</li> </ul>	<ul style="list-style-type: none"> <li>▪ Little to no engagement between staff member and participant.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Questions require participant to consistently repeat their responses.</li> <li>▪ Asks unproductive questions.</li> <li>▪ Does not allow time for questions and response.</li> <li>▪ Interrupts participant when speaking.</li> <li>▪ Unintentional judgmental responses.</li> <li>▪ Disregards opportunity to discuss participant's feelings.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Allows time for questions and response.</li> <li>▪ Courteous, doesn't interrupt when participant is speaking.</li> <li>▪ Avoids judgmental responses.</li> <li>▪ Reassures the participant that her/his feelings are okay.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Allows time for questions and response.</li> <li>▪ Courteous, doesn't interrupt when participant is speaking.</li> <li>▪ Avoids judgmental responses.</li> <li>▪ Help the participant identify her/his feelings.</li> <li>▪ Reassures the person that her/his feelings are okay.</li> <li>▪ Appropriately repeats what they feel they just heard the participant say.</li> <li>▪ Repeats an important thought—a key word, phrase or sentence. For example, if a participant says "I'm really worried!" Your response might be, "You're worried," which should be in a tone of voice which encourages the other person to tell you more.</li> </ul>
<ul style="list-style-type: none"> <li>❖ Gives affirmations</li> </ul>	<ul style="list-style-type: none"> <li>▪ No affirmations provided.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Minimal discussion between staff and participant to allow</li> </ul>	<ul style="list-style-type: none"> <li>▪ Staff is complimentary, supportive and uses reinforcing statements.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Staff is complimentary, supportive and uses reinforcing statements.</li> <li>▪ Focuses on successes and efforts.</li> </ul>



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		<p>complimentary, supportive or reinforcing statements.</p> <ul style="list-style-type: none"> <li>▪ No comments regarding successes or efforts.</li> <li>▪ Frequent use of “I” statements.</li> <li>▪ Disregards opportunity to validate participant’s feelings.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Focuses on successes and efforts.</li> <li>▪ Limits use of “I” statements.</li> <li>▪ Validates the participant’s feelings.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Avoids “I” statements.</li> <li>▪ Reassures the participant that feelings are okay, for example, “That must be very hard for you,” or “It sounds like a lot has happened to you.”</li> <li>▪ Validates the participant’s feelings in a sincere way.</li> </ul>
❖ Uses reflections	<ul style="list-style-type: none"> <li>▪ No use of reflections.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Minimal use of simple reflections.</li> <li>▪ Inappropriate use or timing of reflections.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Uses simple reflections, repeats or rephrases what the participant said in similar words.</li> </ul>	<ul style="list-style-type: none"> <li>▪ May use simple reflections, but skilled in use of deeper reflections, paraphrasing and reflecting a feeling. Requires staff to ask what they think the participant means, what they might be feeling. For example, “it sounds like you...”</li> <li>▪ Uses reflections to help further explore the participant’s thoughts and feelings.</li> </ul>
❖ Summarizes	<ul style="list-style-type: none"> <li>▪ No use of summarizing.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Minimal use of summarizing.</li> <li>▪ Inappropriate use or timing of summary.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Staff repeats back to the participant key points of what he/she has said to let the participant know they are involved, interested and listening.</li> <li>▪ Staff provides a brief summary.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Staff repeats back to the participant key points of what he/she has said to let the participant know they are involved, interested and listening.</li> <li>▪ At appropriate points rephrases or restates what they understood the participant said.</li> <li>▪ Staff provides a brief summary that is non-judgmental and refers directly back to the participant’s concerns. For example, “Let me see if I understand.”</li> <li>▪ Staff summarizes any action items that have been identified “You want to wean your toddler off of bottles.”</li> </ul>



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				<ul style="list-style-type: none"> <li>▪ Staff checks for understanding, for example “did I get it all?”</li> </ul>
<ul style="list-style-type: none"> <li>❖ Closes the conversation</li> </ul>	<ul style="list-style-type: none"> <li>▪ No closure to the conversation.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Brief discussion to close the visit, information may not be relevant to the next steps or success of the participant.</li> <li>▪ Closes conversation too soon.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Asks participant about next steps.</li> <li>▪ Summarizes what been discussed.</li> <li>▪ Reviews plan for follow-up.</li> <li>▪ Thanks them for coming.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Summarizes what been discussed</li> <li>▪ Staff explores the next steps, for example, “we’ve talked about ... what might you want to focus on?”</li> <li>▪ Embraces the different possibilities for a successful visit bed-sides action.</li> <li>▪ Reviews plan for follow-up.</li> <li>▪ Reviews any goal(s) the participant identified during the next steps discussion.</li> <li>▪ Affirms confidence in their ability to succeed.</li> <li>▪ Thanks them for coming.</li> </ul>



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<ul style="list-style-type: none"> <li>❖ Participant is actively involved</li> <li>❖ Tailored Nutrition messages</li> </ul>	<ul style="list-style-type: none"> <li>▪ No nutrition education provided.</li> <li>▪ Goals not offered or discussed resulting in no goals being set.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Education provided, participant not actively involved in topic selection.</li> <li>▪ Simple and clear language not used.</li> <li>▪ Uses words like “should, must, need to, don’t, can’t”.</li> <li>▪ Does not address participant’s interests or concerns.</li> <li>▪ Too many messages or concerns addressed during visit.</li> <li>▪ Irrelevant information supplied.</li> <li>▪ Participant not involved in selecting a measurable goal.</li> <li>▪ If gives pamphlet, participant not actively involved in topic selection or isn’t relevant.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Gathers information through the nutrition assessment process to Identify nutrition risks and the participant’s needs, interests, and goals.</li> <li>▪ Participant is actively involved in determining next steps for improving health outcomes.</li> <li>▪ Uses simple and clear language.</li> <li>▪ Minimizes or avoids words like “should, must, need to, don’t, can’t”.</li> <li>▪ Tailored nutrition message(s) based upon participants interests/concerns.</li> <li>▪ Limits number of nutrition messages discussed.</li> <li>▪ Identifies the most important topic or nutrition concern and prioritizes accordingly.</li> <li>▪ Discusses need-to-know information.</li> <li>▪ Involves the participant in selecting a measurable goal.</li> <li>▪ If needed, uses an appropriate pamphlet and personalizes it for that participant.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Gathers information through the nutrition assessment process to Identify nutrition risks and the participant’s needs, interests, and goals.</li> <li>▪ Participant is actively involved in education discussion and determining next steps for improving health outcomes.</li> <li>▪ Uses simple and clear language.</li> <li>▪ Avoids words like “should, must, need to, don’t, can’t”. Uses phrases like “research shows..., some parents have found..., a possible consideration is...”</li> <li>▪ Tailored nutrition message(s) based upon participants interests/concerns.</li> <li>▪ Limits number of nutrition messages discussed.</li> <li>▪ Identifies the most important topic or nutrition concern and prioritize accordingly.</li> <li>▪ Assesses the participant’s “Stage of Change.”</li> <li>▪ Discusses need-to-know information.</li> <li>▪ Involves the participant in selecting a measurable goal.</li> <li>▪ Allows time for the participant to practice knowledge or behavior.</li> <li>▪ Evaluates what the participant learned.</li> <li>▪ If needed, uses an appropriate relevant pamphlet and personalizes it for that participant. Asks permission before giving a pamphlet.</li> </ul>
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❖ Progress from previous visit(s)	<ul style="list-style-type: none"> <li>▪ No comments are made concerning progress or goals of last visit.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Staff asks questions that don't generate discussion from the participant about specific progress, for example, "How are you doing since your last visit."</li> </ul>	<ul style="list-style-type: none"> <li>▪ Staff discusses the goal(s) set at the last WIC appointment with the participant.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Comments are made concerning the progress of last visit.</li> <li>▪ Reviews the goal(s) set at the last WIC appointment.</li> <li>▪ Reviews if specific progress was made or barriers to progress.</li> <li>▪ Follow-up on referrals if applicable.</li> </ul>
<b>7. Benefit Issuance</b>	<b>(0)= Required Action</b>	<b>(1) = Needs Attention</b>	<b>(2) =Meets Requirements</b>	<b>(3) = Exceeds Requirements</b>
<ul style="list-style-type: none"> <li>❖ Food Package</li> <li>❖ Explains food package</li> <li>❖ Issue benefits</li> <li>❖ Authorized WIC vendor and food list</li> </ul>	<ul style="list-style-type: none"> <li>▪ Benefits not issued/incorrect issuance.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Issues benefits before or during nutrition assessment.</li> <li>▪ Participant is not asked about food benefits preferences.</li> <li>▪ Participant is not told to shop only at WIC approved stores.</li> <li>▪ Gives pamphlet for food list without explanation, of how to use the eWIC card, how to reset PIN, how to read receipts, that there is a WIC Shopper App, etc.</li> <li>▪ Not offering to set the PIN.</li> <li>▪ Not explaining ways to check balance, in stores, online, through the App, over the phone, etc..</li> </ul>	<ul style="list-style-type: none"> <li>▪ Issues benefits after nutrition assessment.</li> <li>▪ Participant is asked about food benefit preferences.</li> <li>▪ Staff member discusses why food benefits are prescribed.</li> <li>▪ Discusses how to use eWIC such as first and last day to use.</li> <li>▪ Discusses shopping only at WIC approved stores. Look for "WIC Accepted Here" signs.</li> <li>▪ Discusses and provides copy of food list pamphlet for WIC approved foods.</li> <li>▪ Offers to set the PIN to use eWIC card.</li> <li>▪ Discusses the WIC Shopper app and how to check eWIC balance.</li> <li>▪ If participant has a long history with WIC, asks if they have questions on how to use eWIC, understand which foods are approved and how to identify stores that are approved.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Issues benefits after nutrition assessment.</li> <li>▪ Participant is asked about food benefit preferences.</li> <li>▪ Staff member discusses why food benefits are prescribed.</li> <li>▪ Discusses that food benefits are supplemental.</li> <li>▪ Discuss how to use eWIC such as first and last day to use benefits.</li> <li>▪ Discusses shopping only at WIC approved stores. Look for "WIC Accepted Here" signs.</li> <li>▪ Discusses, provided, and shows participants how to use the food list pamphlet for WIC approved foods, how to use the eWIC card, how to use the WIC shopper app, how to read receipt, reset PIN, and how to check balance inquiries in various ways.</li> <li>▪ Set the PIN.</li> <li>▪ Discusses if there are any issues with stores or not receiving the benefits they should to contact the clinic.</li> <li>▪ If participant has a long history with WIC, asks if they have questions on how to use eWIC, understand which foods are approved and how to identify stores that are approved.</li> </ul>



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*Note: The information above provides guidance on policies and best practices for WIC visits. However, extenuating circumstances may arise where some actions may not be completed. The expectation is to document thoroughly to account for those situations (examples: missed appointment, participant refusal, no goal set, etc.).*

