



GROUP SESSION LEADER’S GUIDE – VERIFICATION OF CERTIFICATION POLICY UPDATE 2016

Session Focus:

Target Audience: WIC staff who process incoming or outgoing Verification of Certifications (VOC).

Session Goal: To update guidance for VOC processes.

Session Objectives: By the end of the session staff will be able to...

- Objective 1: Describe what to do if an incoming VOC arrives at an Idaho WIC clinic without a VOC paper or card.
- Objective 2: Identify what information is required for a VOC paper or card to be valid.
- Objective 3: Determine what information is needed to provide an incoming VOC with an exempt infant formula.

Session Planning:

Materials Needed:

Staff handouts:

- Practice Case Studies

Additional materials for session leader:

- WIC Connects Group Session Leader’s Guide – VOC Update Policy Update 2016
- VOC Policy Update Training 2016 PowerPoint
- Practice Case Studies Answers

Preparation Needed:

- Review materials in advance of the group training session.

Prior to leading the in-service session, spend time reflecting on how you can ‘model’ participant centered services (PCS) skills throughout the session. Read the in-service outline below and think about where you might use open-ended questions (see the activities), affirmations (affirm staff for their comments/answers during the session), reflections (acknowledge when the group seems apprehensive, excited, confident, etc.), and summarizations (anywhere it seems to fit during the session discussions). At the conclusion of the power point presentation session, determine the “next steps” (see slide 22 below) and summarize.

Session Outline:

Facilitator notes – (total time needed about 60 to 75 minutes)

PPT Slide:	Important concepts to cover, learning activities
Slides 1	The United States Department of Agriculture (USDA) Food and Nutrition Services (FNS) has updated Verification of Certification (VOC) policy guidance to help ensure seamless continued participation of certified participants who move during their certification period. This will help make the transferring process easier for participants and local agencies by ensuring all states are following the same VOC guidelines.

<p>Slides 2, 3</p>	<p>VOC related wording in the Rights, Responsibilities and Consent form has been updated. Participants need to be educated on the process and purpose of VOC. Staff are to ensure this in the following ways:</p> <ul style="list-style-type: none"> • By describing the VOC availability and process on the Rights, Responsibilities, and Consent form. • By routinely asking participants if they plan to move during the certification period – this needs to be done at the local agency during each certification appointment.
<p>Slide 4</p>	<p>VOC’s must be provided to every participant who is a member of a migrant family and any other participant who is likely to relocate during a certification period (such as homeless participants).</p>
<p>Slide 5</p>	<p>The state office made updates to the VOC printed in WISPr and the VOC form in the computer down kit to include the following items:</p> <ul style="list-style-type: none"> • <i>State and local agency contact information</i> • <i>Issue date and VOC ID number</i> • <i>WIC participant name and ID number</i> • <i>Category and priority</i> • <i>Staff person name and signature</i> • <i>Begin and end certification dates</i> • <i>Income eligibility date</i> • <i>Period of check issuance</i> • <i>Nutrition risk criteria code(s) and title(s)</i> • <i>Nondiscrimination statement</i>
<p>Slide 6</p>	<p>When a participant moves out of a local agency’s area:</p> <ul style="list-style-type: none"> • If a participant has a current medical documentation form on file then include a copy with the outgoing VOC form. • A VOC doesn’t need to be issued if the participant is staying in Idaho.
<p>Slide 7</p>	<p>Each state is required to have one central contact phone number that WIC clinics in other states can call to get participant transfer information. In Idaho this will be our Help Desk number.</p> <ul style="list-style-type: none"> • When another state calls requesting a VOC, the Help Desk will connect the caller with the appropriate local agency. • Requested information must be provided to the receiving agency no later than the next business day.
<p>Slide 8</p>	<p>The minimum information that needs to be included on an incoming VOC in order to consider it valid is:</p> <ul style="list-style-type: none"> • Participant’s name • Date of certification • Date current certification expires
<p>Slide 9</p>	<p>If an incoming VOC doesn’t have a nutritional risk(s) listed, staff are to use risk 502 Transfer of Certification (VOC).</p>
<p>Slide 10</p>	<p>There may be times when information on a VOC form is hand written (such as when a computer system is down, etc.) This is acceptable. However if the information on an incoming VOC appears questionable, then staff should contact the sending agency to verbally verify the VOC is valid.</p>
<p>Slide 11</p>	<p>Each state’s VOC contact phone number is now listed on this national website: http://www.fns.usda.gov/wic/wic-contacts</p> <ul style="list-style-type: none"> • Contact other states when an incoming participant arrives with no VOC, or if the minimum required information is incomplete, or if the information on the VOC appears questionable. • If the participant has the clinic’s contact information, try calling the clinic first before calling the State’s VOC contact phone number. Staff will probably receive the needed information quicker by calling the local agency clinic first.

Slide 12	<p>States are no longer allowed to require participants to sign a release form in order to get a VOC. This was never a requirement in Idaho, but many Idaho WIC staff experienced this barrier when trying to get VOC's from other states in the past. Per federal policy:</p> <ul style="list-style-type: none"> • WIC agencies can't require a participant to sign a release of information to share VOC information with another state's WIC program. • HIPAA requirements don't apply to WIC VOC information shared between WIC programs. • If there's concern if it's really another state requesting VOC information, the caller may be requested to fax agency letterhead as verification of who they are.
Slides 13, 14	<p>If a participant was receiving an exempt infant formula or nutritional product from WIC before they moved, staff are to assist the incoming VOC towards continuing to receive it:</p> <ul style="list-style-type: none"> • Another state's medical documentation form (WIC exempt formula/nutritional with medical diagnosis) will be accepted by Idaho WIC for the remainder of that certification (unless the form end date is sooner). The incoming VOC participant doesn't need to get an Idaho health care professional to complete medical documentation until the certification ends. • If a VOC participant was receiving an exempt infant formula/nutritional before moving and doesn't bring the medical documentation form, staff will contact the out-of-state agency to request the form be faxed or sent electronically.
Slide 15	<p>Another state's medical documentation form for a non-contract standard formula won't be accepted. Staff will need to assist the participant with transitioning to a contract formula (just as the process is now).</p>
Slide 16, 17	<p>Remind staff that incoming VOCs don't need to be re-certified by Idaho WIC staff to transfer. The only thing staff need to check is:</p> <ul style="list-style-type: none"> • the VOC paper/card • the participant's identity • the participant's proof of residency <p>If the certification on an incoming VOC expires within 30 days, staff may complete a certification at that time if it's more convenient for the participant.</p> <p>If the participant voluntarily reports a change of income within the last 90 days of the certification, staff don't need to reassess income and the participant may receive benefits for the remainder of the certification.</p>
Slide 18, 19	<p>Each individual situation needs to be considered when staff are deciding what food package to issue to an incoming VOC during the month they transfer:</p> <ul style="list-style-type: none"> • If the participant brings all of their unredeemed checks or an electronic benefit transfer (EBT) card from the other state, staff are to destroy the checks/card and issue a full food package. (With EBT cards, if possible staff are to ask participants to pull up the EBT balance on their phone or have them call the 1-800 # on the back of the EBT card for staff to verify there are unredeemed benefits before issuing a full food package). • If the participant brings part of their checks and says they redeemed the other checks or part of their EBT card benefits, destroy the checks/card and issue a half food package. (With EBT cards, if possible staff are to ask participants to pull up the EBT balance on their phone or have them call the 1-800 # on the back of the EBT card for staff to verify there are unredeemed benefits before issuing a half food package). • If the participant has used all of their checks or EBT card and the VOC form shows a benefit end date that's mid-month, staff are to issue a half food package. • If the participant doesn't bring any checks or EBT card, staff are to contact the transferring state and ask if benefits were redeemed. Based on redemption, issue the appropriate package as previously described. • If the participant redeemed all their benefits, consider the situation. If a participant moved from a nearby area (such as a neighboring community on a state border) and says they took their food

	with them, don't issue a food package. If the participant moved a long distance (such as from Texas to Idaho) and couldn't take perishable foods, issue a half package.
Slide 20	<p>The final step with the VOC transfer process is staff documentation in WISPr:</p> <ul style="list-style-type: none"> • Valid VOC was obtained: participant information, certification dates and nutrition risk(s) were entered • Identity was verified • Residency was verified • Any information relevant to the food package staff issued (or didn't issue) was noted
Slide 21	<p>(Leader hands out the <i>Practice Case Studies</i> sheet. Have staff discuss how they would respond to the different scenarios. Use the information on the <i>Practice Case Studies Answers</i> sheet as a guide.)</p> <p>Questions? Thank you for participating in this training!</p>

Facilitator review:

How well did the session support understanding of the VOC policy?

What suggestions do you have for the State Office regarding future training and related materials?

Feedback may be given to:

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