

## **2.22            Emergency Certifications and WIC Operations**

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### **POLICY:**

In certain emergencies, including but not limited to disasters, inoperable clinic facilities, and critical staffing shortages, the Nutritionist/Nutrition Associate (CPA) can complete certifications, including initial certifications and subsequent certifications, without physical presence. See **Policy 2.01 Certification of WIC Participants**. An emergency is an event that is outside of the Local Agency's control and creates ongoing barriers to in-person service. It is the State Agency's discretion to waive physical presence and approve length of time, for providing clinic services.

**This policy can ONLY be utilized with State Agency Approval.** The Local Agency Director must keep the completed Request for Emergency Certifications and WIC Operations approval form (see **Attachment #1, Emergency Services Certification and Operations Approval Form**) on file at the Local Agency. The following steps must be taken in order to seek approval for Emergency Certification:

1. The Local Agency Director must complete **Attachment #1, 2.22 Emergency Services Certification and Operations Approval Form**.
2. The form must be sent to the State Agency Deputy Director for approval.
3. Once it is granted by the State Agency, the Local Agency Director and the SA Help Desk will be notified of the approval.

All face-to-face follow-up appointments, including mid-certification follow-ups and high-risk follow-ups, can be completed without physical presence.

1. The Nutritionist/Nutrition Associate (CPA) will complete nutrition counseling over the phone. For example, when conducting an appointment for a high-risk follow-up participant due to low hemoglobin, the nutritionist may discuss the importance of consuming iron-rich foods, foods high in vitamin C, etc. OR using VENA principles, allow the participant, parent/guardian or caretaker to determine the topic of discussion for nutrition education.
2. Food benefits will be issued, and the next appointment will be scheduled.
3. The Nutritionist/Nutrition Associate (CPA) will document in the care plan that the appointment was completed without physical presence due to Emergency Certification approval.

Nutrition Education and breastfeeding contacts can be done remotely, either online or over the phone. *Note:* Any refusal of Nutrition Education must be documented on the Nutrition Education screen in Crossroads.

### **PROCEDURE:**

- A. WIC staff will use a state-approved phone system (i.e. Google Voice, agency issued cell phone or iPad, etc.) to complete the certification.

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1. Before starting any appointment, WIC Staff must verbally verify that they are speaking with the participant, parent/guardian, or caretaker.
  - a. Staff must ask three (3) identifying questions – birthday, child or children’s birthdays, address, last four (4) digits of Social Security Number, etc.
2. WIC staff will explain to the participant/parent/guardian that you will be asking questions about income and other personal information to complete the certification.
3. WIC will explain to the participant/parent/guardian that you will be entering information into the **Crossroads Computer System**, so they are aware of what is happening during the appointment.
4. The CPA will contact the interpreter service for a participant with Limited English Proficiency (LEP).

**B. WIC staff will verify the identification, residency and income of the participant and parent/guardian or caretaker.**

1. Documentation of Participant and Parent/Guardian or Caretaker identification, residency and income must be provided to the certifying WIC clinic at every certification appointment (initial and subsequent certifications).
  - a. Documentation can be mailed, emailed, faxed, photographed, and texted to a WIC-owned cell phone, etc. to the certifying WIC clinic.
  - b. If using Medicaid for adjunct eligibility, WIC staff must utilize the West Virginia MMIS System to verify Medicaid eligibility on the day of the appointment.
2. If the participant, parent/guardian, or caretaker is unable to provide all proofs and is not adjunctively eligible, WIC staff will complete a temporary certification.
  - a. A temporary certification is a shortened, thirty (30) day certification period, where the applicant is lacking one (1) of the three (3) required components of determining eligibility (identification, residency and income).
  - b. Documentation will need to be provided to the WIC clinic within 30 days. If documentation is not provided, certification will expire.
  - c. A temporary certification can only be used once per certification.
    - i. A temporary certification can only be used again if a full certification was completed in between temporary certifications.
    - ii. A temporary certification **cannot** be used again if a full certification

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was not completed.

3. All WIC staff should review:
  - a. **Policy 2.04** Residency Requirements
  - b. **Policy 2.06** Income Eligibility Requirements
  - c. **Policy 2.17** Identification of the Applicant/Participant and Parent, Guardian or Caretaker

### **C. Participant Demographics Screen**

1. WIC staff will document the required information on the **Participant Demographics Screen**.
  - a. Under **Physical Presence**, select “no.”
  - b. Select the **Physical Presence Exemption Reason**, “State Agency Approved Emergency.”

### **D. Complete the Income Information Screen**

1. If the participant or parent/guardian or caretaker is not adjunctly eligible and cannot email income documentation (i.e. paystubs), enter “**XXXXXX**.”
  - a. **Crossroads** will require income source, frequency, and gross income amount; the participant will self-declare these items for temporary certification only.
  - b. This will give the participant a temporary, 30-day certification.

### **E. Issuing an EBT Card Remotely**

1. If the participant or WIC family needs a new EBT card, it can be mailed:
  - a. The envelope cannot have any WIC logos or identifying information on it.
  - b. The envelope cannot have a window.
  - c. Do not put return to sender on the envelope.
  - d. Confirm the address on file.
  - e. Document mailing in the family record.

### **F. Certification Signature**

1. The Remote Services Acknowledgement Form, The Participant Agreement, and the Authorization for Release of Health Information, (ARHI) will be sent to the participant or parent/guardian/caretaker via DocuSign. The participant, the parent/guardian, or caretaker must read and sign the document. Ensure for all initial certifications that the participant agreement is addressed to the parent/guardian 1 and that the signature that is on the document is the

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parent/guardian 1. The Participant Agreement for a sub-certification appointment can be the parent/guardian 1/parent/guardian 2/caretaker.

- a. WIC staff will scan The Participant Agreement into the participant's Crossroads file.
2. WIC staff will verbally review the required parts of the Participant Agreement.
3. WIC staff will click Capture Signature and write "See Scanned Document" and sign in the Certification Signature box.
  - a. WIC staff must sign using their complete signature, not their initials.
5. If the participant, parent/guardian, or caretaker lacks internet access or prefers a paper copy, WIC staff will offer to mail a copy of the Participant Agreement.

### **G. Anthro/Lab Screen**

1. Collect height/length and weight from the Health Information Network (WVHIN) or physician's office. Height/length and weight must have been measured within the past 60 days.
2. If applicable, collect a hemoglobin (hgb) value and lead value from the Health Information Network (WVHIN) or physician's office. Hemoglobin values must be measured within the past 90 days, and taken in the participant's current category. Lead values must be measured within the last year.
3. Only accept any measurements that are from a healthcare provider.
  - a. You must receive verbal or written verification from the healthcare provider; *the WVHIN is written verification.*
  - b. Measurements must be documented correctly in the **Crossroads Computer System.**
  - c. Do NOT scan documentation into the **Crossroads Computer System.**

*Note: Documenting the participant as not physically present removes the requirement to enter measurements, hemoglobin values and lead values.*

### **H. Nutrition Assessment Screens**

1. The Nutritionist/Nutrition Associate (CPA) will utilize VENA to assess for all potential nutrition risk codes for the participant's category and age.
  - a. Utilize the WV WIC website for handouts that can be shared electronically with participants/parents/guardians: WIC Nutrition and Breastfeeding Handouts

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- b. WIC staff will offer to mail or email nutrition education materials to participants.
  - c. If applicable, WIC staff will encourage downloading the WICSmart App.
- 2. Promote breastfeeding to pregnant participants by exploring questions and concerns about breastfeeding.
  - a. Offer breastfeeding peer support if available.
  - b. Offer information to address concerns; document in the participant's file.
  - c. WIC staff will offer to mail breastfeeding education materials to participants.
- 3. Immunization Documentation: All participants under the age of two (2) will be asked to show documentation of their immunization record, specifically DTaP; immunization documentation is located on the **Health Information Screen**. Immunization records can be electronic records (WVSIIS).
  - a. If documentation shows they are up-to-date, mark **Up-to-date**.
  - b. If documentation shows they are NOT up-to-date, mark **them as Not Up-to-date** and refer the participant to their healthcare provider or local health department.
  - c. If there is no documentation available, mark **Unknown** and if necessary, refer the participant to their healthcare provider or Local Health Department.
  - d. Review **Policy 2.20 Immunization Screening and Referral**.
- 4. Document answers to questions in the **Crossroads Computer System**.
- 5. Assign all appropriate Risk Factors.
- 6. Discuss and document referrals.
  - a. Example: all participants age 3 and older must be referred to Head Start. *Reminder:* go to the pencil and mark the referral as "Kept."
- 7. Discuss and assign goals.
- 8. Complete a Nutrition Care Plan on the **Care Plan Screen**.
  - a. "Remote Certification due to State Agency Approved Emergency" must be documented in the Nutrition Care Plan.

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### **I. Prescribe and Issue Food Benefits**

1. Issue benefits for the appropriate number of months.
2. WIC staff will discuss the food package and the WV WIC Shopping Guide with the participant or parent/guardian/caretaker.
3. WIC staff will encourage participants to download the WIC Shopper App.
  - a. WIC staff will also encourage the downloading of the WIC Smart App.
4. WIC staff will offer to mail WV WIC Shopping Guide, Food Benefit Shopping List and Technology Brochure (if applicable).
5. WIC staff will select their user ID for signing; sign for benefits and will write "RBI" for Remote Benefit Issuance.
  - a. WIC staff must sign using their complete signature, not their initials.

### **J. Make Future Appointment**

1. Make a future appointment and let the participant or parent/guardian, or caretaker know what documents will be needed.
2. Most participants will be scheduled every 3-months as:  
**Initial Certification – Nutrition Education – Mid-Certification Follow-Up – Nutrition Education – Subsequent Certification**
3. The Nutritionist/Nutrition Associate (CPA) may use slight discretion when scheduling appointments:
  - a. If the participant needs a follow-up appointment in place of nutrition education, the Nutritionist may schedule a remote follow-up appointment.

### **K. Appointment Reminders**

1. Upon approval of an Emergency Certification, the Local Agency will be responsible for participant appointment reminders.
2. The State Agency will not provide notification reminders during the period where physical presence has been waived at an approved Emergency Certification and WIC Operations WIC Clinic or Local Agency

### **ATTACHMENTS:**

1. Emergency Certification and Operations Approval Form

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**REFERENCES:**

1. USDA - Certification and Eligibility Resource and Best Practices Guide
2. West Virginia Service Delivery Redesign Document, 2023.