

**Indiana WIC Program  
Indiana State Department of Health**

**Client File Contents**

**Policy Statement**

Local agency staff will manage client file information in a manner that minimizes duplication and allows information to be easily understood between staff.

**Authority**

Nutrition Services Standards Standard 14. Nutrition Services Documentation

**Procedure**

- I. Select information throughout the INWIC client file is required to be completed at certification or mid-certification before the user can advance through the screens.
- III. Subjective and objective information gathered within the INWIC client file during the client contact is not required to be restated in the client's Individual Care Plan, Breastfeeding Note or Nutrition Education Counseling Note.
- III. History buttons or history screens built into the INWIC system retain and display information collected during previous client certifications.
- IV. The method and topic of contact for individual and group class sessions will be documented in the Nutrition Education tab of the INWIC. A no-show or client refusal for Nutrition Ed must be documented in the Nutrition Education tab.
- V. The note system in the INWIC allows for copy and paste from one client chart to another (e.g., from mom to child). Copied notes, once pasted, must be edited to reflect information applicable to the client's category and specific steps to nutrition and behavior change.

- VI. Screen notes are built into the INWIC system in various places. Screen notes in the following locations are required for the following reasons:
- A. Justification for CPA assignment of a nutrition risk must be documented in the Nutrition Risk screen note.
  - B. Materials used to support Nutrition Education must be documented in the Nutrition Ed screen note.
  - C. Tailoring of a food package must be documented in the Food Package screen note. This includes for the following food package issuance:
    - 1. Less than a full food package;
    - 2. Higher or lower milk fat amount;
    - 3. Formula change; and/or
    - 4. Ready-To-Use formula.
- V. All INWIC client files contain the same category specific information gathered during the client contact.
- A. Household demographic and income information
  - B. Client demographic and category information;
  - C. Assessment information;
    - 1. Height and weight (anthropometric risks),
    - 2. Bloodwork (biochemical risks),
    - 3. Breastfeeding data and support (breastfeeding risks)
    - 4. Pregnancy data (prenatal breastfeeding decision making)
    - 5. Health data (clinical/health/medical risks)
    - 6. Nutrition data (dietary risks)
    - 7. Mid-certification (health/dietary risks)
    - 8. Client concerns/needs
  - D. Nutrition risk assignment and priority level
  - E. Nutrition education (including breastfeeding contacts)
    - 1. Date of contact
    - 2. Method of delivery (Certification Individual or Household; Follow-up Individual, Household, Group or Internet)
    - 3. Topic (e.g. anemia, weight gain, etc.)
    - 4. Materials provided to support nutrition education

F. Referrals

1. Type (household or individual)
2. Date of referral
3. Follow-up (participation/non-participation)

G. Food package prescription

H. Notes and Alerts file

1. Alerts
2. General Notes
3. Individual Care Plans
4. Nutrition Education Counseling Notes
5. Breastfeeding Notes

Information on use of notes is included in the Documentation of Client Contacts policy.