Indiana State Department of Health
Indiana WIC Program

Documentation of Client Contacts

Policy Statement

Documentation of client contacts provides valuable information to deliver nutrition services and continuity of care. Information should be organized, easily understood, concise and accurate.

Authority

Nutrition Services Standards: Standard 14. Nutrition Services Documentation

Procedure

I.   Documentation will be completed the day of the contact.

    A.   All staff will sign their note by typing their first initial and last name when entering a General Note, Nutrition Ed/Counseling Note, Breastfeeding Note or Individual Care Plan (ICP).

    B.   When abbreviating, only state approved abbreviations will be allowed. The State approved abbreviations list may be found in the forms section.

II.   All notes entered at Certification and follow-up contacts must include the required elements.

    A.   S: (Subjective)
- Information shared by the client during the participant centered contact that are not already entered elsewhere in the INWIC system; and
- Follow-up from the last visit.
  - Reinforce nutrition education; and
  - Update referrals.

    B.   A: (Assessment)
- CPA assessment of client's progress since last visit.
  - Recognize barriers to progress; and/or
  - Improve intervention as needed.

- CPA determination of client's <u>newly</u> identified primary health and nutrition concerns based on their nutrition risk assignment.
- CPA determination of client's <u>newly</u> identified primary personal concern based on their interaction and feedback.

C.   P: (Plan)
- CPA plan to support client's progress toward previous goal(s).
- CPA plan to address client's <u>newly</u> identified primary concerns (nutrition risk and/or personal) through education and/or referral.

D.   Next appointment with reminders to aid in follow-up.
E.   Staff signature at the end of the note using the CPA first initial and last name.

III.   The Individual Care Plan (ICP) note box must be used to document individual contacts for all high risk non-breastfeeding clients.

A.   The ICP note box will be initiated on the same date the client is assigned high risk.
B.   The ICP/Follow-up note boxes will be used to document individual contacts for the duration of the Certification, regardless of when or if high risk is resolved.

IV.   Either the ICP note box or the Nutrition Education/Counseling (NEC) note box must be used to document individual contacts for all low risk non-breastfeeding clients.

A.   To ensure consistency, the local agency must determine which note box staff will use for low risk non-breastfeeding contacts. All staff must follow their local agency practice.
B.   Agencies choosing to use the ICP note box for low risk clients must then use the ICP/Follow-up note boxes to document individual contacts for the duration of the Certification. This saves space on the Note screen by reducing the number of rows added.

V.   The Breastfeeding Note must be used to document individual contacts for all breastfeeding women and infants (high or low risk).

    A.   The INWIC system links the infant to the mom in the client information screen through the "Mother's ID" field.

    B.   For infants and mothers in a breastfeeding dyad, regardless of high risk status, a Breastfeeding Note entered in the mom's chart may be copied to the infant's Note screen through the "Link Baby" button on the <u>mom's</u> Breastfeeding screen.

VI.   The General Note must only be used for administrative communication. This may include, but is not limited to, documenting the following activities.

    A.   In-state transfers from clinic to clinic (system generated)

    B.   Certification completion notice (system generated)

    C.   Nutrition Education completed through WICHealth.org (for tracking purposes prior to CPA phone contact).

    D.   Refusal of second nutrition contact.

    E.   Amount of formula being returned (to verify return recorded on Destruction of Returned Formula Log).

    F.   Physician contacts.

    G.   Provider communications regarding prescriptions.

    H.   Issuance of Sanction Due to Program Violation form (accompanied by an Alert).