

**GENERAL WIC Local Agency Management Evaluation Office Review Checklist/Documents**

√	<b>Administrative</b>	<b>Notes/follow-up required</b>
	NH <b>Policy &amp; Procedure</b> Manual _____ release _____ is available for staff	
	Local Agency(LA) Policy & Procedure Manual (if applicable)	
	<b>Federal Regulations</b> _____ version _____ is available for staff	
	State Agency <b>Numbered Policy Memos</b>	
	<b>Time Study</b> —physical hard or electronic copies of approved staff time studies.	
	Job descriptions (only new staff not included in most recent contract)	
	Staff resumes on file (only new staff not on in most recent contract)	
	Agency WIC/BFPC staffing attachment.	
	<b>Civil Rights</b> training attendance and local agency procedure	
	Conflict Resolution & Customer Service training attendance	
	<b>Respect and Civility in the workplace training attendance</b>	
	<b>Agency website</b> —How to request free language services	
	<b>Agency website</b> –Non-discrimination statement	
	<b>Civil Right complaint log</b>	
	<b>TOM Log</b> (Training/Outreach/Meeting)	
	<b>Outreach</b> Plan— (TOM log) discuss progress [Caseload Mgt #1 Question]	
	LA outreach materials- check Non-Discrimination statement	
	<b>Local Agency Referral sheet</b>	
	Local Agency WIC clinic schedule	
	<b>Workplan</b> goals and objectives-discuss progress	
	LA <b>Conflict of Interest</b> statement and policy if different from SA; signed annually [Certification #12 Question]	
	LA <b>Confidentiality</b> statement and policy including vendors if different from SA; signed annually. (Agreement-7/2015)	
	LA <b>Separation of Duties</b> policy if different from SA; signed annually. Review any tracking log if available.	
	LA <b>Computer security policy and procedure</b> —passwords, log-on and logging off the network	
	LA <b>Remote Benefit Loading</b> policy --standard situation used—procedures	
	<b>Program Operations</b>	
	<b>Rights &amp; Rules-</b> Review manual signature report (Print report at SA)	
	<b>No proof forms-</b> review 5 files for documentation of self-declaration (0 income/identity/residency) from ME report <b>ID#/ or NAME TO BE PROVIDED by the State Agency</b>	
	Participants Found <b>Ineligible/ Over-income</b> – review 5 files for proper documentation from ME report <b>ID# or NAME TO BE PROVIDED by the State Agency</b>	
	<b>Participant Suspensions/DQ</b> – If applicable, review all files for proper documentation (Fran to print list) (view LA letter sent to participants)	
	<b>Participant Warnings</b> – review 5 files for proper documentation	
	eWIC card manual signatures (Print report at SA) <b>ID#/ NAME TO BE PROVIDED by the State Agency</b>	
	Mailed eWIC cards log- review documentation	
	Agency closure log/ clinic mailed cards (any large mailing in last 12m)	
	Computer Inventory, Maintenance Anti-virus software updates and Security log	
	Updated Inventory Report to conduct physical inventory	
	Card Inventory/reconciliation/clinic issuance log	
	List of Homeless facilities contacted with dates and document used	
	Authorized Store List	
	All staff meeting agenda/minutes.	
	<b>Nutrition</b>	
	Nutrition <b>Risk Criteria</b> Manual	

	Training log for nutrition staff CEUs (TOM Log)	
	Local Agency developed Nutrition Education Materials including newsletters, pamphlets, board display	
	FUN Second Contact Scripts	
	Special formula documentation folder for WIC issued and/or Medicaid issued formula participants	
	Formula donation/destroyed log	
	Local Agency policy (if applicable) for outside agency's providing nutrition services/certification	
	Local Agency High Priority Procedure, if different from State Agency	
	Agency nutrition meeting agenda/minutes.	
	<b>Breastfeeding</b>	
	Electric Breast Pump follow up and tracking tool	
	Breastfeeding Inventory: Electric, Single User and Manual Pumps	
	Agency BF meeting agenda/minutes (if BFPC meetings separate agenda/minutes)	

Updated 07/2022