Planning Tool 9:

**Streamlining Certification**

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|  | PurposeSimplifying the certification process for adjunctively eligible WIC applicants can reduce barriers to enrollment and allow families to receive benefits with less effort. It also reduces administrative burden, so identifying areas where you can streamline the process is helpful to everyone involved. Use the steps below to identify when and how to reduce or eliminate application paperwork.**EXAMPLE**Two states that piloted targeted outreach simplified the certification process for respondents by relying on the documentation of adjunctive eligibility to meet additional documentation requirements. * In Massachusetts, families certified through the pilot did not need to provide any documents beyond identification because the WIC agency used the MassHealth ID obtained through the data match to confirm, before the certification appointment, that the applicant was still participating in MassHealth, which documented adjunctive income eligibility and residency.
* Montana developed special scripting for WIC staff to follow when calling back outreach applicants to schedule their WIC certification appointments. The script advised applicants that they only needed to bring identification to their certification appointment.
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More information about using documentation of adjunctive eligibility to document residency and identity is available in the “Documenting Eligibility” section of [Assessing Your WIC Certification Practices.](https://www.cbpp.org/research/food-assistance/assessing-your-wic-certification-practices#tab-eligibility)

1. **First, gather information to understand selected scheduling and certification practices and identify opportunities to streamline each step.**

Answer the initial question about the WIC scheduling and certification process to describe your current practices. Then consider how each of the steps in the certification process are or could be customized for WIC applicants from your outreach group.

| **Question** | **Your Answer** |
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| 1. Documenting adjunctive eligibility
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| Currently, when scheduling a WIC enrollment appointment, how do staff check whether an applicant is enrolled in Medicaid, SNAP, TANF, or another program that makes them adjunctively eligible for WIC? If they don’t check, how would it be possible to? |       |
| What options are available to make staff aware of an applicant who is known to be in the targeted outreach group, and thus adjunctively eligible, when they contact the applicant to schedule an appointment? |       |
| 1. Appointment scheduling
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| Currently, what information is given to applicants when they schedule their appointment, such as what to bring and expect? How does this information differ for applicants who are known or anticipated to be adjunctively eligible?  |       |
| If it doesn’t differ, how could it be customized for applicants who are adjunctively eligible*?* |       |
| 1. Appointment reminders
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| Currently, what information is included in reminders for certification appointments? How are reminders customized for applicants who are adjunctively eligible? |       |
| If they are not customized for adjunctively eligible applicants, how could they be? |       |
| 1. Determination of eligibility
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| Currently, what are the steps for determining and documenting income, residency, and identity during the certification appointment? How do the steps differ for applicants who are adjunctively eligible? |       |
| If they don’t differ, how could that be changed? For example,could adjunctive eligibility be documented in a participant’s record in advance of the certification appointment? If so, how and when can this occur? Could documentation of participation in a program that confers adjunctive eligibility also document residency, an option that some states have adopted? |       |

1. **Next, consider additional options to streamline the processes for scheduling and conducting certification appointments for adjunctively eligible families.**

Use these questions to brainstorm opportunities to simplify any certification processes that were not covered above.

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| **Question** | **Your Answer** |
| What additional steps of the certification process can be modified or simplified when applicants are adjunctively eligible?  |       |
| Are there other ways to streamline eligibility documentation in the WIC management information system for applicants who are adjunctively eligible?  |       |
| How are changes in scheduling or certification practices to be communicated to local staff?  |       |

1. **Plan for preparation of the materials, protocols, and staff training to implement streamlined processes for scheduling and conducting certification.**

Complete the table by adding items needed to implement streamlined processes and identifying who will be responsible. This step will help your team to identify where your needs are and what resources are required to support these changes.

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| **What change is proposed?** | **Who will develop the policies, processes, system updates, or communications that are needed?** | **Who else will contribute or offer guidance in this process?** | **What resources are needed to make this change possible?** |
| ***Example****: Customized pre-application form for individuals who respond to outreach.*  | *Outreach lead* | *IT department*  | *Planning and review time* |
| ***Example:*** *Sample script for staff who contact applicants from targeted outreach groups.* | *Training lead* | *Policy team and training team* | *Time and volunteer agencies to test messaging*  |
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