



Memorandum

TO: WIC Regional Directors
WIC Local Agency Directors **#08-019**

FROM: Linda Brumble, Unit Manager **(Original Signed)**
Nutrition Education/Clinic Services Unit
Nutrition Services Section

DATE: February 8, 2008

SUBJECT: *FY 2008 WISE Cost Report*

This is a reminder that March is the data collection month for the *WISE Report, Form WIC-227A*. Information from this report is used to fulfill the United States Department of Agriculture (USDA) federal reporting requirements. A packet of *WISE Reporting Information* is included for your use (this information is also available on the WIC web page). The packet includes:

- *A WISE Cost Report Form (WIC-227A)*
- *Examples of Activities for WISE Report Categories*
- *WISE Cost Report Policy*

Each local agency must report expenditures broken down into the five categories required for the *WISE Report* during the month of March. This may entail tracking time spent on duties associated with the different categories for some of your staff during this time period in order to accurately allocate salaries and benefits. If your March billing will include pay periods for a different month, then you may choose to track staff time associated with the time period billed **or** actual staff time for the calendar month of March. If the latter option is selected, then indicate in the remarks section that salary costs included on this report will differ from those included on your March billing.

Careful review of the document entitled *Examples of Activities for WISE Report Categories* is required, since some Immunization related costs are allowable WIC expenditures through the effort of coordination. The WIC immunization number reported in block #11 should only include shots given by WIC staff in WIC clinics.

Again, this data is an important part of our federal reporting to USDA. It is your responsibility to make sure that this report reflects expenditures divided into these five functional categories as accurately as possible. **The *WISE Report* must be submitted to the State Agency by April 30, 2008.** Any delays in reporting will hold up the fiscal year 2009 contract process.

If you have any questions, or require additional information, please contact Kim Jackson, Grant Reporting, at (512) 458-7111, extension 3436, or via e-mail at Kim.Jackson@dshs.state.tx.us.

Attachments (4)

INSTRUCTIONS FOR WISE COST REPORT FORM WIC-227A

Block 1: Enter the organization name and address (local agency or public health region).

Block 2: Enter the WIC local agency number.

Block 3: Has been completed for you.

Block 4: Enter the fiscal year applicable to the month and year being reported.

Blocks 5

Thru 10: Enter the dollar amount expended during the report month for each one of the five functional categories of NSA expenditures including indirect costs applicable for each category. Include all special funding (Peer Counseling, Registered Dietician Consultants, Lactation, Vendor Liaison, Dietetic Internship, etc.) Attached are more detailed explanations of cost categories.

General Administration: Expenditures generally considered to be overhead or management costs.

Nutrition Education: Expenditures for general nutrition education. Do **not** include breastfeeding expenditures.

Breastfeeding: Expenditures for breastfeeding promotion and support.

Client Services: Expenditures for certification, food delivery and other client services and benefits.

Immunizations: Expenditures for providing immunizations to WIC participants and their siblings.

Block 11: Enter the total number of WIC immunizations given at your local agency for this month.

Block 12: The original signature (no rubber stamps allowed) of the designated official (Local Agency or Regional WIC Director).

Block 13: Print or type the name and title of designated official.

Block 14: Enter the date the report is submitted to the State Agency.

Block 15: Enter the telephone number of designated official.

EXAMPLES OF ACTIVITIES FOR WISE REPORT CATEGORIES

General Administration:

- General management (majority of the local agency director's salary)
- Salaries of accountant, program specialist, and ADP specialist for time spent on general admin activities
- Outreach
- Program reporting
- Vendor contracts/evaluations
- Vendor monitoring
- Food vouchers security and accountability
- Food voucher reconciliation
- Payroll and employee time accounting
- Personnel counseling, performance evaluation, monitoring
- Accounting, audits, self audits (not NE or BF portion)
- Financial or legal services
- Clerical support for accountants program specialists, director
- Prevention of fraud
- Office equipment, furnishings, supplies used to support general admin activities
- Data processing (ADP) costs, associated with general admin activities
- Portion of office space/utilities, telephone, fax services, postage/freight & travel to support general admin activities
- Completing locally generated reports (Immunizations)
- Immunization outreach
- Immunization personnel activities (hiring, evaluating, etc...)

Client Services:

- Obtaining/assessing height, weight, and blood samples for certification
- Obtaining/assessing diet recall information
- Explanation of eligibility to applicants
- Issuance of food vouchers
- Training participants on how to use their food vouchers
- Referrals to other health care and social services
- Coordination with other agencies/programs to obtain services for WIC clients
- Participation in activities which promote a broader range of health and social services for participants
- Participation in surveys/studies which evaluate the impact of WIC on its participants
- Medical supplies and equipment necessary to conduct required diet and health assessments
- Portion of office space/utilities, phone, fax services, postage/freight & travel used to conduct clients service activities
- Clerical support for clinic operations associated with serving clients
- Scheduling of appointments
- Income screening and verification
- Screening shot records
- Reminder cards/calls for shots
- Pulling immunization records
- Entering shots into Texas WIN system

Nutrition Education:

- Teaching nutrition education classes (not BF)
- Individual counseling (not BF)
- Documenting NE contracts
- NE portion of self audit
- Preparation/planning for NE classes or individual counseling sessions
- Developing and providing NE materials
- Attendance of NE training sessions (to include travel, course fees, tuition)
- NE training of other staff
- Completing NE modules
- Interpreter/translator services to facilitate NE
- Enclosure of NE materials in advance/triple envelopes
- Scheduling of NE classes
- Equipment and furnishings used to conduct NE activities
- NE supplies/materials such as brochures, incentive items of nominal cost, demonstration food item
- Evaluation or monitoring of NE
- Portion of office space/utilities, telephone, fax services, postage/freight & travel used to conduct NE activities
- ADP services which provide nutrition education (multi-media units), track nutrition risk or NE contacts

Breastfeeding:

- Teaching, planning and preparing for BF classes
- Individual counseling on breastfeeding
- Interpreter/translator services to facilitate breastfeeding education
- Peer counseling to include scheduling and coordination
- Developing and providing BF materials
- Breastfeeding materials/supplies such as brochures & breastfeeding aids used in BF promotion and support
- Attendance of BF training sessions (to include travel, course fees, tuition)
- Self audit to assess adherence to BF policies
- Scheduling of BF sessions
- Evaluation or monitoring of BF
- Portion of office space/utilities, telephone, fax services, postage/freight & travel used to conduct BF activities
- Equipment and furnishings used to conduct BF activities
- ADP services which track breastfeeding rates

Immunizations:

- Completing, reviewing and/or explaining forms
- C109 encounter form (if applicable)
- C100 consent form
- C102 given to parent
- C105 refrigerator temperature form
- C88 tally sheet
- Batch header form (if applicable)
- VFC eligibility screening form

<p style="text-align: center;">Nutrition Services Department of State Health Services</p>

Effective October 1, 2001

Policy No. AC:29.0

WISE Cost Report, WIC-227A

Purpose

To provide the state agency (SA) with the necessary breakdown of all local agency (LA) costs into the four categories as mandated by federal nutrition services and administrative costs (NSA) reporting requirements and to comply with a federal mandate to conduct an annual cost per shot calculation.

Authority

7 CFR Part 3016

Policy

LAs shall report their expenditures for the month of March of each contract year in the four functional categories mandated by the United States Department of Agriculture (USDA), plus an additional fifth category mandated by the SA. Federal regulations require LA costs to be categorized as: nutrition education, breastfeeding, general administration, and client services. The SA designates the cost of providing immunizations as the fifth category. All expenditures shall be reported by the SA as an addendum to the year-end closeout report.

Procedures

- I. The LA shall follow the instructions attached to or on the reverse side of the SA supplied WISE cost report, WIC-227A form. This form may be located at: <http://www.dshs.state.tx.us/wichd/fin/wiseform.pdf>.
- II. The LA shall submit the annual WISE cost report to the SA by April 30th of each year.

Guidelines

A detailed explanation of the activities and types of costs that fit into each of the five categories is provided in the Appendices.

Immunizations: continued

- C5 monthly reports
- C33 monthly reports
- C33a monthly reports
- VFC provider enrollment forms by site
- Provider profile form

Traveling/Training (specifically required for Immunizations):

- Traveling to training
- Providing, attending, or preparing for in-service and/or monthly meetings
- Reviewing and/or implementing new policies
- Providing, attending, or preparing for CPR training

Vaccine Administration:

- Preparing vaccine
- Administering vaccines
- Monitoring post injection
- Patient education
- Reviewing consent forms
- Valid/invalid contraindications
- Adverse reactions
- Showing video – "Precious chance"
- Dealing with an emergency response

Inventory Control:

- Ordering vaccine, syringes and other medical supplies
- Monitoring refrigerator temperature
- Storing and handling vaccine, syringes, and other medical supplies

Other Immunization Activities:

- Calling professionals / physicians
- Providing professional support
- Conducting self-audits
- Supervising clerks
- Coordinating records with other programs (local and/or MCH)

Medical Supplies specifically for providing immunizations (syringes, vaccines, etc.)

Refrigerators & other immunization related equipment

Note: these examples are not all inclusive