

WIC Directors' Planning Calendar of State Required Due Dates

FREQUENCY	ACTION	TO SA?	COMMENTS
Daily	Successful transfer of data each day the computer is used	Y	Automatic transfer to state. For network locations, the server and workstation 1 should be left running at the end of the day. Refer to TX WIN LA/Clinic Reference Manual. All standalone and laptop computers must run end of day processing each day clinic is held. Laptops connect to state via a Verizon wireless card plugged in to the laptop or if that is not available return to a permanent site and initiate end of day processing.
	Run foxfire report for participants certified that day who are under 17 years old. Check ineligible records for participants under 17 years old.	N	This is a recommendation to ensure compliance with reporting child abuse (Rider 14).
7 th working day	Performance Measures and Born-to-WIC breastfeeding (BF) rates for previous month	Y	Submit PM report to cdsb@dshs.state.tx.us no later than the 15 th of each month. Retain BTW BF rates by monthly participation documentation at the LA (BF: 08.0)
30th calendar day of month following reporting month	FSR-269A January 1 st quarter (Oct., Nov., Dec.) April 2 nd quarter (Jan., Feb., Mar.) July 3 rd quarter (Apr., May, June) October 4 th quarter (July, Aug., Sept.) November* 4 th quarter (July, Aug., Sept.) B-13 (Reimbursement Voucher) for previous month	Y	Submit to wicvouchers@dshs.state.tx.us by the 30 th calendar day of the month following the reporting month. (AC: 28.0) *(September [Final] - amended upon liquidation of all encumbrances due by November 14th)
Monthly	EBT reconciliation letters-10 day response (if applicable to your LA).	Y	Follow procedures in EBT reconciliation letter sent to your LA. For questions, email mark.morrow@dshs.state.tx.us
	Provide staff training/education.	N	Retain documentation at the LA including attendees, name and title of person presenting, date and outline of training. (TR:03.0)
	Provide in-service on breastfeeding topics for Breastfeeding Peer Counselors.	N	Retain documentation at the LA. (BF: 03.0 & 04.0). PC meetings can be conducted by conference call, if necessary. Attending Texas WIC Training as available is an option for meeting in-service requirements.
	Reconcile all SA purchased breast pump inventory against inventory logs	N	This should be done monthly, at minimum. (BF: 05.0 & 06.0)
Quarterly	Track Born-to-WIC breastfeeding rates by enrollment	N	Retain tracking chart at the LA. (BF: 08.0) BTW BF rates by enrollment reports can be found at DSHS WIC Gen Info http://www.dshs.texas.gov/wichd/gi/gi1.shtm
March 1 st	Annual Plan of Operations (APO) due for the following year	Y	Email APO spreadsheet to AnnualPlanforOPS@dshs.state.tx.us (GA: 13.0)
March (During month)	Collect data for the WISE Report	N	Due April 30th to the SA. (AC: 29.0)
April 30 th	WISE Report due	Y	Submit to Submit to yolanda.caad@dshs.state.tx.us (AC: 29.0)
June 15 th	Plan to Allocate Direct Costs (PADC) for the following Fiscal Year	Y	Submit to Contract Development and Support Branch (CDSB) at WICPADC@dshs.state.tx.us . (AC: 03.0)
Aug 31 st	Physical Inventory of Reportable Assets on GC-11	N	Retain documentation at the LA for use when submitting GC-11. (AC: 07.0)
Sept 30th	Submit a minimum of 5 continuing education credits/hours every fiscal year to maintain WCS certification	Y	Trainings may include SA trainings, LA trainings or subject appropriate trainings offered by outside entities. Send to tiffany.brown@dshs.state.tx.us (CS: 16.0)
Oct. 15th	List of all tangible personal property (GC-11) due	Y	Submit to DSHS Contract Oversight Section at COSequip@dshs.state.tx.us (AC: 07.0)
Oct. 30 th	FYXX Outstanding Obligations	N	Retain documentation at the LA. (AC: 02.0)
45 calendar days following contract term	Close Out Reports (Final FYXX billings)	Y	Submit to wicvouchers@dshs.state.tx.us . (AC: 32.0)

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Ongoing	Complete ADA or 504 Checklists and the Self-Assessment for Civil Rights Compliance for all new sites and sites that have changed location or have been remodeled.	N	Retain documentation at the LA for three years plus current year. (CR: 06.0) Self-Assessment for Civil Rights Compliance, http://www.dshs.texas.gov/qmb/contractor.shtm
	Renew CLIA certificate when needed.	N	The CLIA certificate or copy must be kept on file at the LA. (GA: 16.0)
	Submit clinic hour changes to SA.	Y	Email changes to: wicclinics@dshs.state.tx.us
	Maintain up to date local resource list of healthcare/drug/substance abuse counseling/treatment.	N	Retain documentation at the LA. (CS: 21.0)
	Maintain updated list of employees on WIC and/or their relatives & close friends on WIC.	N	Not required, but strongly recommended. (GA: 20.0)
	Submit all LA policies requiring SA approval prior to implementation.	Y	Submit to your LA's Clinic Services Liaison. Retain approvals/ waivers at the LA.
	Submit amendments to PADC as they become effective.	Y	Changes i.e. health & insurance rates, travel rates, other activity. Submit to CDSB at WICPADC@dshs.state.tx.us (AC: 03.0)
	Calibrate scales and hemoglobin/hematocrit equipment as needed per manufacturers' instructions.	N	Retain documentation of calibration at the LA. (CS: 17.0 & Guidelines for Nutrition Assessment)
	For an existing WCS Program, submit changes to Plan.	Y	Submit changes and names of new WCS candidates for SA approval prior to beginning the WCS Training Program. Send to Clinic Services Branch, tiffany.brown@dshs.state.tx.us (CS: 16.0)
	Ensure the LA has a designated NE, BF, Training, 504 coordinator (if 15 or more employees) and a NVRA Liaison.	N/Y	Only the name of the Training Coordinator needs to be submitted to Nutrition Services via Nutrition Education & Breastfeeding Plans. (NE: 02.0, BF: 02.0, TR: 03.0, CR: 06.0 and GA: 19.0).
	Provide training for <i>all</i> new employees during orientation: Child abuse training during orientation. BF Staff Referral Protocol within 1 month of employment. Security Awareness and Computer Usage training within 30 days of hire. Civil Rights, Customer Service, and job skills training within 3 months of employment.	N	Retain documentation at the LA including attendees, name and title of person presenting, date and outline of training. (AUT: 08.0, BF: 01.0, BF: 04.0, CR: 08.0 & TR: 03.0) http://www.dshs.texas.gov/wichd/tng/tng1.shtm Child Abuse http://www.dshs.texas.gov/childabusereporting/default.shtm
	CA/WCS staff complete Nutrition Modules and current staff complete revised modules as instructed by the State office.	N	Retain documentation at the LA. (TR: 03.0). Documentation should include dates of completion as well as the date of the revision of the module.
	Breastfeeding Coordinator and CA staff and staff who issue pump within 6 months of employment or prior to issuing pumps, receive breastfeeding training	N	Retain documentation at the LA (BF: 04.0)
	CAs complete one of the DSHS BF trainings within 12 months of employment & repeat no less than every 5 years	N	Retain documentation at the LA (BF: 04.0)
	Staff who issue nipple shield and supply supplemental nursers receive training prior to issuing supplies	N	Retain documentation at the LA (BF: 04.0)
	Ensure new employees have all required immunizations and/or documentation of declinations according to local agency's policies.	N	Retain documentation at LA. Standards for Public Health Clinic Services http://www.dshs.texas.gov/qmb/dshsstndrds4clinicsevs.pdf
	Ensure new employees have current registration/licensure and existing employees maintain current licensure.	N	Retain documentation at the LA. May use these websites for verification: Nurses www.bon.texas.gov/olv/verification.html ; RDs www.cdrnet.org/ ; LDs www.dshs.texas.gov/dietitian/default.shtm and LCs http://americas.iblce.org/find-an-ibclc

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Every 6 months	Food Delivery self-audit using worksheets FDA-1 and FDA-2	N	Self-audit at each clinic site (QA: 01.0) Worksheets located under Monitoring Tools & Instructions on DSHS QMB website at http://www.dshs.texas.gov/qmb/default.shtm
Bi-annually	Distribute outreach information to potentially eligible persons.	N	Retain documentation at the LA. (OR: 01.0)
	Clinic record reviews.	N	Retain documentation at LA. http://www.dshs.texas.gov/qmb/dshsstdrds4clincservs.pdf (QA: 01.0)
	Conduct QA evaluation of administrative, eligibility, clinical and to assure conformity to standards. (Self-audit)	N	Administrative evaluation should include reviewing local policies to update or delete those no longer current. Retain documentation at the LA including training and education based on QA results. (QA: 01.0)
Annually	Nutrition Education and Breastfeeding Plans must be submitted to the State office.	Y	Submit to your assigned NE liaison in the <i>Nutrition Education Branch</i> and keep on file at the LA. The due date will be provided in the plan. (NE: 03.0)
	Conflict of Interest statements to be signed by <i>each</i> employee	N	Retain documentation at the LA for audit/review. (GA: 20.0)
	Conduct civil rights, customer service and Security Awareness, and Computer Usage training for all employees.	N	Retain documentation at the LA including attendees, name and title of person presenting, date and outline of training. (AUT: 08.0, CR: 08.0 & TR: 03.0)
	Breastfeeding (BF) Coordinator to attend Nutrition/Breastfeeding (NBF) Conference.	N	Retain documentation at the LA. (BF: 02.0)
	Nutrition Education (NE) Coordinator to attend Nutrition/Breastfeeding (NBF) Conference.	N	Retain documentation at the LA. NE Coordinator may attend other conferences/training in lieu of the NBF conference with SA approval. (NE: 02.0)
	Annual breastfeeding update for <i>all</i> employees.	N	Retain documentation at the LA. (BF: 04.0)
	Maintain up-to-date outreach plan.	N	Retain documentation at the LA. (OR: 01.0)
	Maintain disaster plan and local point-of-contact list with information concerning staff and emergency resources/contacts, conduct/attend disaster training and maintain disaster kit.	N	Must be updated at least annually. http://www.dshs.texas.gov/wichd/gi/administrative.shtm
	Conduct QA evaluation of facility at <i>all</i> sites. (Self-audit)	N	Retain documentation at the LA. (QA: 01.0)
	Conduct performance evaluations on <i>all</i> employees	N	Retain documentation at the LA. DSHS for Public Health Clinic Services http://www.dshs.texas.gov/qmb/dshsstdrds4clincservs.pdf
	Distribute Client Satisfaction Surveys at <i>all</i> sites in the appropriate languages	N	Retain surveys and documentation of action taken to improve services at the LA. DSHS for Public Health Clinic Services http://www.dshs.texas.gov/qmb/dshsstdrds4clincservs.pdf
	List of all automated equipment provided by state management	Y	Submit the WIC Annual State Equipment Verification Form and send to rollie.hernandez@dshs.state.tx.us . SA will send notification to LAs.
	Fiscal self-audit using worksheet FA-1	N	Retain documentation at the LA (QA: 01.0) Worksheets found under Monitoring Tools & Instructions on DSHS QMB website at http://www.dshs.texas.gov/qmb/default.shtm
Every 5 Years	BF Coordinator and <i>all</i> CAs/WCS are required to retake breastfeeding training	N	Retain documentation at the LA. (BF: 04.0)