

WIC Directors' Planning Calendar of State Requirements

Quarter 1 (Oct. & Dec.)

October	Description	SME/Contact
2 nd Quarter Funding Survey	Complete this survey for 2nd quarter funding (this survey is available only when additional funds are available).	Tammye.FarmerHolloman@hhs.texas.gov
Submit the 4 th quarter FSR.	FSR for July, August and September (AC: 28.0)	WICInvoices@hhs.texas.gov
Review the 4 th Quarter Performance Measures.	Review performance measures using Power BI (Families NE Refused, Certified 1 st Trimester and Active Participants) and Qualtrics (Customer Service).	Paula.kanter@hhs.texas.gov
December	Description	SME/Contact
Close out all reports by December 29th (90 days following contract term).	Close Out Reports (Final FYXX invoices and FSRs) (AC: 28.0)	WICInvoices@hhs.texas.gov

Quarter 2 (Jan., Feb., Mar.)

January	Description	SME/Contact
Submit the 1 st Quarter FSR.	FSR for October, November and December (AC: 28.0)	WICInvoices@hhs.texas.gov
Review the 1 st Quarter Performance Measures.	Review performance measures using Power BI (Families NE Refused, Certified 1 st Trimester and Active Participants).	Paula.kanter@hhs.texas.gov
February	Description	SME/Contact
1st Quarter (Initial) Funding Survey	Complete this survey for the following fiscal year funding.	Tammye.FarmerHolloman@hhs.texas.gov
March	Description	SME/Contact
By March 1 st , submit the Certification of LA Hours of Operation form .	The form submitted is a verification that permanent business hours are listed correctly in TXIN.	AnnualPlanforOPS@hhs.texas.gov
During March, track expenses by Client Services, General Administration, NE and BF. This activity is for the WIC Report due April 30th to the SA.	Follow the instructions provided in the annual memo.	Shery.Gurguis@hhs.texas.gov

Quarter 3 (April, May, June)

April	Description	SME/Contact
Submit the 2nd Quarter FSR.	FSR for January, February and March (AC: 28.0)	WICInvoices@hhs.texas.gov
Submit the WISE Report by April 30th.	Follow the instructions provided in the annual memo.	Shery.Gurguis@hhs.texas.gov
Review the 2 nd Quarter Performance Measures.	Review the performance measures using Power BI (Families NE Refused, Certified 1 st Trimester and Active Participants).	Paula.kanter@hhs.texas.gov
May	Description	SME/Contact
By May 31 st , update the Appendix B Disaster Point of Contact Information and local point of contact list with information concerning staff and emergency resources/contacts, conduct/attend disaster training and maintain the disaster kit.	The plan must be updated annually in TXIN. Refer to the Annual Disaster memo for processing disaster victims.	WICClinics@hhs.texas.gov Tiffany.brown@hhs.texas.gov
June	Description	SME/Contact
By June 15 th , submit the Plan to Allocate Direct Costs (PADDC) for the following fiscal year.	Submit amendments to PADDC as they become effective (AC: 03.0).	WICPADDC@hhs.texas.gov

Quarter 4 (July & Sept.)

July	Description	SME/Contact
Submit the 3rd Quarter FSR.	FSR for April, May and June (AC: 28.0)	WICInvoices@hhs.texas.gov
Review the 3 rd Quarter Performance Measures.	Review performance measures using Power BI (Families NE Refused, Certified 1 st Trimester and Active Participants).	Paula.kanter@hhs.texas.gov
September	Description	SME/Contact
By September 30 th , submit a minimum of 5 continuing education credits/hours every fiscal year to maintain WCS certification for LAs with WCS Programs.	Trainings may include SA trainings, LA trainings or subject appropriate trainings offered by outside entities that fall within the WCS CEC guidelines (CS: 16.0).	WCSProgram@hhs.texas.gov
By September 30 th , FYXX outstanding obligations.	Retain documentation at the LA (AC 02.0).	
By September 30 th , complete Physical Inventory of Reportable Assets in WIC Asset Management System (WAMS) AssetTiger or other inventory system comparable to WAMS.	Ensure WAMS or other inventory system comparable to WAM is updated with new assets, anything removed (disposed of, etc.), transferred to another LA or moved to another site (AC: 07.0).	Amber.oltmann@hhs.texas.gov Noemi.hernandez2@hhs.texas.gov (Disposition)

Monthly

Action	Description	SME/Contact
Submit WIC invoices by the last business day of the month following the reporting month.	Reimbursement invoices (AC: 28.0)	WICInvoices@hhs.texas.gov
Provide monthly staff training/education.	Retain documentation at the LA, including attendees' names, job titles, training topics and the date the training was completed (TR 03.0).	Angela.Gil@hhs.texas.gov
Conduct monthly meetings or trainings for Breastfeeding Peer Counselors.	Retain documentation at the LA, including attendees' names, topics and the date the meeting or training was completed (BF 03.0 and 04.0).	Asia.Sartor@hhs.texas.gov
Reconcile all SA-purchased breast pump inventory against the Texas MIS system breast pump inventory.	The reconciliation should be done monthly, at a minimum (BF 03.0 and BF: 06.0).	Lost or stolen breast pumps Leticia.delaRosa@hhs.texas.gov System issues WICClinics@hhs.texas.gov

Once per Fiscal Year

Action	Description	SME/Contact
Conduct QA evaluation of the facility at all sites using the facility section of the Local Agency Self-Audit Clinical Monitoring Tool .	If errors are identified, a Corrective Action Plan must be developed. Retain documentation of the self-audit and corrective actions electronically at the LA. If LA uses a different form/checklist, they must include all review criteria listed on the current fiscal year Quality Management checklists (QA: 02.0).	QMB@hhs.texas.gov
Conduct Food Delivery self-audit at all clinic sites using SA worksheets FDA-1 and FDA-2 .	If errors are identified, a Corrective Action Plan must be developed. Retain documentation of the self-audit and corrective actions electronically at the LA. If LA uses a different form/checklist, they must include all review criteria listed on the current fiscal year Quality Management checklists (QA: 02.0).	QMB@hhs.texas.gov

Twice per Fiscal Year

Action	Description	SME/Contact
Conduct multi-disciplinary quality management committee meetings .	Retain documentation at the LA (QA 02.0).	QMB@hhs.texas.gov

Twice per Calendar Year

Action	Description	SME/Contact
Distribute outreach information to organizations and agencies that serve potentially eligible persons.	Retain documentation at the LA (OR: 01.0).	Jessica.leyendecker@hhs.texas.gov

Annually

Action	Description	SME/Contact
Conflict of Interest statements are to be signed by each employee (new employees upon employment).	Retain documentation at the LA (GA: 20.0).	Paula.kanter@hhs.texas.gov
Trainings: Complete Civil Rights, Cybersecurity Awareness (replaces Security Awareness and Computer Usage training), Hospitality, Human Trafficking and Intimate Partner Violence trainings for all employees.	Retain documentation at the LA, including attendees' names, job titles, training topics and the date the training was completed (AUT: 08.0, CR: 08.0 & TR: 03.0). DIR website: Statewide Cybersecurity Awareness Training Texas Department of Information Resources.	Angela.Gil@hhs.texas.gov

<p>NE Coordinator and BF Coordinator attend the Texas Nutrition and Breastfeeding Conference.</p>	<p>Retain documentation at the LA. With SA approval, coordinators may attend other conferences/trainings in lieu of the NBF conference (NE: 02.0 and BF: 02.0). Contact SAP for these circumstances.</p>	<p>Akata.Sanghani@hhs.texas.gov (NE) Safia.Hussain@hhs.texas.gov (BF)</p>
<p>Submit the LA NEBF Plan.</p>	<p>Submit plans including class schedule, staff BF referral protocol, client BF resource list and outreach plan (NE: 2.0, BF: 2.0, OR 1.0). Follow the instructions in the memo, which is usually sent in May/June, with plans due in July.</p>	<p>Akata.Sanghani@hhs.texas.gov (NE plan) Safia.Hussain@hhs.texas.gov (BF plan) Jessica.Leyendecker@hhs.texas.gov (Outreach plan)</p>
<p>Annual breastfeeding updates for all employees</p>	<p>Retain documentation at the LA (BF: 04.0).</p>	<p>Safia.Hussain@hhs.texas.gov</p>
<p>Contact each homeless facility where current WIC participants reside to verify that the required conditions are being met.</p>	<p>Contact is only applicable if LA or clinic has a homeless facility in the area served (OR: 01.0).</p>	<p>Tiffany.Brown@hhs.texas.gov</p>
<p>Fire extinguisher inspection</p>	<p>Occupational Safety and Health Administration e-CFR for portable fire extinguishers</p>	<p>QMB@hhs.texas.gov</p>

Every 2 Years

Action	Description	SME/Contact
<p>Renew the CLIA Certificate of Waiver when needed.</p>	<p>The CLIA Certificate of Waiver or copy must be kept on file at the LA (GA: 16.0). A Certificate of Waiver is valid for two years.</p>	<p>Leona.duong@hhs.texas.gov</p>
<p>Conduct clinical self-audits using the Local Agency Self-Audit Administrative, Clinical Monitoring and Record Review Tools and Record Review worksheets.</p>	<p>If errors are identified, a Corrective Action Plan must be developed. Retain documentation of self-audits and corrective actions electronically at the LA. If LA uses different form/checklist for self-audits, they must include all review criteria listed on current fiscal year Quality Management Monitoring Tools (QA 02.0).</p>	<p>OMB@hhs.texas.gov</p>
<p>Conduct financial management self-audit using the Local Agency Self-Audit Fiscal Monitoring Tool and worksheet FA-1.</p>	<p>If errors are identified, a Corrective Action Plan must be developed. Retain documentation of self-audits and corrective actions electronically at the LA. If LA uses different form/checklist for self-audits, they must include all review criteria listed on current fiscal year Quality Management Monitoring Tools (QA 02.0).</p>	<p>OMB@hhs.texas.gov</p>

Every 5 Years

Action	Description	SME/Contact
BF Coordinator and all Cas/WCS are required to retake HHSC BF training.	Retain documentation at the LA, including the attendees' names, job titles, training topics and the date the training was completed (BF 04.0).	Safia.Hussain@hhs.texas.gov (BF Coordinator) Paula.kanter@hhs.texas.gov (Cas) Tammy.jimenez@hhs.texas.gov (WCS)

Ongoing

Action	Description	SME/Contact
Complete the 504 Checklist for all new sites, sites that have changed location or have been remodeled.	Retain the documentation at the LA for three years plus current year (CR 06.0).	Paula.kanter@hhs.texas.gov
Email changes to permanent clinic hours by attaching the updated Certification of LA Hours of Operation form .	List the new clinic hours in the body of the email.	AnnualPLanforOPS@hhs.texas.gov
Email changes to temporary clinic hours or closures to the state agency.	Examples: staff meetings, emergency situations, etc.	WICClinics@hhs.texas.gov
Submit the Clinic Site Justification Form for approval when opening, closing or relocating a clinic.	Form found at WIC Directors Texas Health and Human Services Site Justification Forms (GA: 21.0).	ClinicSiteRequests@hhs.texas.gov

Maintain up-to-date local resource list of healthcare/drug/substance abuse counseling/treatment.	Retain documentation at the LA (CS: 21.0).	Leona.duong@hhs.texas.gov
Calibrate scales and hemoglobin/hematocrit equipment as needed per manufacturers' instructions.	Retain documentation of calibration at the LA (CS: 17.0 and Guidelines for Nutrition Assessment).	Tiffany.Brown@hhs.texas.gov
For an existing WCS Program , submit changes to WCS Plan (CS: 16.0).	Submit changes and names of new WCS candidates for SA approval prior to beginning the WCS Training Program.	WCSProgram@hhs.texas.gov
Ensure the LA has designated NE, BF, Training, 504 Coordinators (504 if 15 or more employees) and a NVRA Liaison .	The names of the NE, BF, and training coordinators need to be submitted to Nutrition Services with NE & BF Plans. (NE:02.0, BF:02.0, TR:03.0, CR: 06.0 & GA:19.0).	
Employees complete required trainings. Refer to Training Requirements Chart for ongoing training requirements for all staff based on staff role.	Retain documentation (AUT: 08.0, BF: 01.0, BF: 04.0, CR: 08.0, GA:24.0 and TR: 03.0).	Angela.gil@hhs.texas.gov
Ensure new employees have current registration/licensure and existing employees maintain current licensure.	Retain documentation at the LA. May use these websites for verification: Nurses www.bon.texas.gov/licensure_verification.asp.html ; RDs www.cdrnet.org/ ; LDs https://vo.licensing.tdlr.texas.gov/datamart/login.do and LCs https://iblce.org/public-registry/ .	