

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 (PADC) for the following fiscal year.	Submit amendments to PADC as they become effective (AC: 03.0).	WICPADC@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)