



Idaho WIC Training

Issuing Benefits



WIC is an equal opportunity provider.

What Will You Learn?

- Issuing eWIC Food benefits
- eWIC Balance
- Voiding eWIC Benefits
- Retailoring a Food package
- Reissuing Formula

Instruction Level

Prerequisite for taking this course:

- WIC Food Package Guidebook
- eWIC Card and Cardholders Guidebook
- Assigning Benefits Guidebook

Items Needed for this Course

The Idaho WIC website wic.dhw.idaho.gov houses all the online materials for staff under the Staff training page.

- Idaho WIC Food List (their location in your clinic)
- Idaho WIC Mother & Infant Food Issuance Grid at Staff > Training > Breastfeeding
- Access to the WIC website for the Reasons Document at Staff > Training > Basics
- Access to WISPr UAT to practice issuing, voiding, and reissuing benefits
- eWIC Card Brochure
- First and Second Cardholder Job Aid
- Trouble shooting shopper issues Job Aid
- WIC Shopper Presentation at Staff > Training > Food Benefits
- Your Clinic's Procedure Guides

Recommended Time

- Approximate time it takes to complete the WIC course: 2-4 hours
- Approximate time it takes to complete the activity and discussion: 1-2 hours

Module 1: Food Package Issuance Overview

Food package Issuance

You learned how to assign and tailor food packages in the Assigning Benefits and Special Authorization guidebook. This guidebook will show you how to issue these benefits.

Note: When there are multiple participants on an account, staff can issue benefits to all participants at once or one at a time.

The issuance screen provides staff a final chance to make sure the food package that was assigned and tailored (if applicable), is correct. Use the View button to review the foods assigned before issuing them.

Note: Remember that different letters and symbols will display next to the food package name if changes have been made to the base food package such as:

- P = Prorated
- T = Tailored
- S = Special Authorization
- (RD) = RD Approval
- (MD) = MD Doc
- (H) = Homeless
- RT = Retailored
- R* = Reissued Formula

Formula Issuance

When a participant receives infant formula and / or a nutritional from a food package, it is important to educate the first cardholder that they do not need to purchase all formula at once.

If there are concerns with tolerance or possible need to transition formula, participants should be encouraged to redeem a few cans at a time until tolerance is confirmed. If it is determined that changes are needed, staff can change the formula under the Reissue Formula screen. (See Reissue Formula module below.)

This allows staff to make an easier exchange without returning formula or the participant having more than they need.

Note: This may not work for all participants if a grocery store is not easily accessible.

Client Not Present/ Remote Loading benefits

If a First Cardholder or Second Cardholder are not physically present when benefits are issued, there is a checkbox on the issuance screen that should be marked to indicate that the benefits were remotely loaded.

Please follow your clinic's procedure for remote loading when a client is not present at their appointment.

Issuance History

The Issuance History screen shows the benefits that have been issued for past, current, and upcoming months. It indicates the food package issued, date food package was issued, when it was valid through, who issued the package and what foods were provided.

eWIC Balance

The eWIC Balance screen displays what food items were issued on a participant's account. If there are multiple participants on a family account, the balance will display the total for all participants combined. The eWIC Balance screen will reflect changes such as redemptions and voiding and will display what is left to be redeemed on an account. The benefits are listed separately for each month. The eWIC balance can be printed and it is recommended that staff ask the First Cardholder/Second Cardholder if they want the balance printed out.

Note: There are two dates: First Day to Use and Last Day to Use. The current month of eWIC food benefits can be used starting on the date of the First Day to Use or the first day of the month and is good through the last day of that month. Remind the participant of the start and end dates to use their eWIC food benefits.



Complete Activities 1 - 3 in your Activities Workbook

Module 2: Voiding Benefits Overview

Voiding Benefits

Participants may call or come into the clinic and request changes to benefits that have been issued. To allow voiding of benefits for the current month, there cannot be any redemptions on the family

account. When a food package is voided, it provides a clean slate to allow special authorizations to be added and base food packages tailored to meet participants' needs.

Staff should check the eWIC Activity section to verify if redemptions have occurred in the current month.

If redemptions have occurred on the account, benefits cannot be voided, and staff will need to use the retailer screen or reissue formula screen to make changes for the current month. (Reminder: there is a limit of one retailer per family per month. Reissue formula can occur unlimited times.)

Staff will need to void future months' benefits and tailor (if applicable) new base food packages to meet participants' needs for the future months.

Participant category changes and providing benefits

A participant's category may change during the month. These changes can require a change in food package. If a participant's category changes to a smaller food package, leave the benefits for the current month, void Future Active Benefits only, and issue the smaller package for the future months. Tailor as applicable.

Situations that require a change to a smaller package include a decrease in breastfeeding percentage or going from pregnant to not breastfeeding.

Some changes require a larger food package. If a participant's category changes to a larger food package, void the current month (if benefits have not been redeemed) and issue the larger package. If benefits have been spent, the current month cannot be voided staff will need to issue a bonus food package.

To issue a bonus package, a message will pop up in the Assign Food Package screen to notify staff that the participant qualifies for a bonus food package. On the Issuance screen there will be an Issue Bonus button to select that will allow a bonus food package to be issued.

Situations that require a larger package may include a breastfeeding percent increase or switching from pregnant to fully breastfeeding.

For more details and a guide to assist staff with which identifying the correct food package, see the Idaho WIC Mother & Infant Food Issuance Grid. Found at wic.dhw.idaho.gov WIC > Staff > Training > Breastfeeding.

Note: If a participant had a tailored food package and a bonus food package is issued, the bonus food package will not be tailored. The foods provided in a bonus food package are the same foods as a base food package. To provide the tailored food package, staff will have to retailer the bonus food package. See Retailor below for more information on retailoring rules and restrictions.

- Practice voiding food packages, with activity 3, either individually, with other learner(s), or with your trainer.

- Meet with your trainer to discuss what you learned.



Complete Activity 3 in your Activities Workbook

Module 3: Retailoring

Retailoring is used when a participant asks for or requires a change in their current month's food package and some benefits have been spent. The participant may need a change because of allergies, food intolerances other medical needs, living situation changes, store availability, and more. When a base food package is retailored an "RT" will display in front of the food package name, which indicates change.

The food package will need to be retailored when benefits have been redeemed for the current month. This will affect all members on an account. Retailoring a food package does have a limit, one participant per family per month.

If benefits have not been spent on the account, the WIC computer system will display a message that says, "There are no redemptions against the family account for the current month." If this message displays, please void the current month's benefits and tailor the food package to meet the participant's needs.

Note: There is no change to policy for obtaining a Medical Documentation form. A verbal may be accepted and then the written Med Doc must be collected within 2 weeks in order to continue issuing product for subsequent months. If a special authorization is needed these must be entered into the system to allow for the products to be available for selection. Also, if a participant/family needs their food packages retailored and formula reissued, staff must retailor first then reissue formula.

One thing to remember when retailoring a food package- make a note of the number in the "Current" column before making changes. This ensures the participant is getting the correct amount of food. The "Current" column reflects changes you make to the basket. Work with the other food item amounts to get the current total back to the original "Current" amount. Remember to use the upper limit since some baskets will also have a lower limit to accommodate for unit equivalencies that do not balance exactly. (The basket limits that are listed in the limit column are stationary and always show the full month basket limits for that base food package.)



Complete Activity 4 in your Activities Workbook

Module 4: Reissuing Formula and / or Nutritionals

Reissuing formula is used when a participant's formulas and / or nutritionals require a change based on their current nutritional needs (MDF, preference, allergies, living situations, etc.). Reissuing is needed when all or some benefits have been used for the current month. There are no limits on the number of times formulas and / or nutritionals may be reissued. When a formula or a nutritional has been reissued an "R*" will display in front of the base food package name, which indicates change.

Staff may need to complete a mix of voiding future benefits and using the reissue screen. For example: If participants have 3 months of benefits and the current month has redemptions, and they need to change the formula, the current month would be adjusted under the reissue formula screen. The future months would be voided, assigned/tailored as applicable, and issued.

If no benefits have been spent, void the current month's benefits and tailor the package to include the formula and / or nutritional.

To add formula and / or a nutritional to a child's or woman's base food package, without formula currently provided, use the Reissue Formula screen. Keep in mind what was said above. If all or some benefits were spent, use the Reissue Screen. If no benefits have been spent, void the current month's benefits and tailor the package to include the formula and / or nutritional.

Note: There is no change to policy for obtaining a Medical Documentation form. A verbal may be accepted, and the written MD Doc must be collected within 2 weeks in order to continue issuing product for subsequent months. If a special authorization is needed these must be entered into the system to allow for the products to be available for selection.

Some situations may need to be assessed on a case-by-case basis. Reissuing formula provides flexibility to meet participants' needs. Staff should refer to their Coordinator and / or supervisor for more guidance.

For infants, formula may be their sole source of nutrition and medical formulas can be costly. WIC is supplemental meaning that caregivers may still need to purchase additional formula needed to meet the nutritional needs for the infant. Infants needing special formula beyond the standard milk-based

products WIC offers may be at higher nutritional risk. This should all be taken into consideration when deciding how much formula to reissue, up to the maximum amount of their original package.

- There is more flexibility with how much formula to reissue when there have been redemptions for the current month.
 - When a package is reissued, the final amount you reissue should account for returned formula, how much the mom is breastfeeding, the container size, and age of the infant. We want to make sure the infant has the formula they need. Utilize the special authorizations when applicable.

The Reissue Formula screen has three required fields: Notes, Quantity to Void, and Select Formula to Reissue.

- In the Notes section staff should document the situation briefly - essentially why they are making the change and how they determined how much formula to reissue.
- In the Quantity to Void field, a value must be entered ranging from zero to the maximum number of cans available to the participant. Example: a participant was issued 11 cans of Similac Advanced Pwd and had not redeemed any formula. However, other redemptions had occurred on the account. The staff can void up to 11 cans because none were spent.
- In the Select Formula to Reissue field a value must be entered which selects a different formula.
 - The WIC computer system assists staff with the section at the bottom; Replace Formula. The system filters the Containers to Reissue number based on what staff have entered. Staff can change the amount of formula to reissue in the I Containers to Reissue field as long as it doesn't exceed the max amount displaying in the Total Equivalent Containers to Reissue field.
 - Staff can determine based on the situation to reissue up to the max amount.

The Reissue Formula screen has an optional field which allows staff to enter Returned Formula.

- If formula redemptions occurred, staff should always ask if participants have cans to return. However, this is not a requirement to make a change to their package or potentially get their full benefits reissued.
 - In some instances, they may have already donated the formula because they couldn't use it or may not have known they could receive the medical formula from WIC.
- If formula is returned to the clinic it must be destroyed based on clinic policy.
 - If participants had a full package at the beginning of the month and redeemed some/all of the benefits but the circumstances would support reissuing the full package, staff may reissue a full package. Remember to document in the notes area of the reissue screen why you took the actions you did.
- Staff can reissue (make changes when the current month has redemptions) to allow for more than one formula type to be issued in a current month. This includes formulas, exempt formulas, and nutritionals with applicable special authorizations.
 - The maximum allowed amount of formula cannot be exceeded (the WIC computer system will flag this). For example, if the participant needs soy formula and has a partial

package with 5 cans, they could be issued 2 cans soy-based and 3 cans milk-based formula to trial and transition, if applicable.

- If a participant requires multiple formulas with an MD Doc special authorization for trialing, best practice would be for staff to obtain verbal consent from the Health care provider initially, then obtain the MDF for the formula that has been selected/tolerated. Staff may enter one (verbal) MD Doc Special Authorization into the WIC computer system for both formulas. Once the healthcare provider determines the appropriate formula and staff receive the MDF, enter one (written) MD Doc Special Authorization into the WIC computer system. For example, the Health care provider is not sure if Similac Total Comfort or Similac for Spit Up will work and wants the participant to trial both for one month.
- If a participant requires continued issuance of multiple exempt formulas or nutritionals, staff need to obtain an MDF for each product. Staff may enter one (written) MD Doc Special Authorization into the WIC computer system for both products. The MDF must be kept onsite (hard copy or electronic).

Q: When reissuing formula, the number of cans redeemed/voided is higher than what I just entered. Why?

A: On the Reissue Formula screen, the "Client Issued" amount includes any past benefits for the month. In the example below a full formula package of Similac Advance was issued for June and then voided. Then, a partial package was issued by mistake and then voided. The 14 cans reflect the initial 10 voided plus 4 that were reissued and voided. On the first line with Nutramigen, the participant was issued a full package of a specialized formula because they had not used any of the prior formula benefits. The participant then used 3 cans and had 6 cans remaining.

Note: The "redeemed/voided" area will include omission of any voided benefits and/or prorated benefits (if it is after the 15th/16th) for the month.



Complete Activity 5 - 7 in your Activities Workbook