



Idaho WIC Training

Assigning Benefits and Special Authorization

Trainer



What Will They Learn?

- eWIC benefits
- Assigning Food Packages
- Tailoring Food Packages
- Prorating Food Packages
- Understand how special authorizations work within the food packages to support good nutrition as well as support and encourage breastfeeding
- Describe the three types of special authorizations

Instruction Level

Prerequisite for taking this course:

- WIC Food Package Guidebook,
- eWIC Card and Cardholders 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.

- Definitions and acronyms (located under the policy manual area)
- Idaho WIC Mother & Infant Food Issuance Grid, found at, Staff > Training > Breastfeeding
- Access to WISPr UAT to practice assigning and tailoring benefits and entering special authorizations
- QRC's on the WIC website found at staff > Training > QRC's
- Videos on the WIC website found at staff > Training > Food Benefits
- Your Clinic's Procedure Guides
- Formulary Handbook, found at Staff > Formulary Handbook > Product guide > Medical Documentation Form
- Idaho WIC Program Policy Manual (IWPPM), Chapter 7: Food Delivery and Chapter 6: Breastfeeding Promotion and Support found at Staff > Policy Manual
- RD vs. MD on the WIC website found at staff > Training > Food Benefits
- Summary of Milk Issuance on the WIC website found at staff > Training > Food Benefits

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



Activity 1

The learner will be asked to go to the WIC Website and review the QRC which shows how to assign, tailor, and issue benefits found at wic.dhw.idaho.gov, Staff > Training > QRC.

The learner will need to practice assigning and tailoring eWIC benefits by going to the WIC computer system training environment and practicing with participants of different ages and categories.

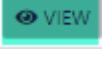
Please assist the learner with finding an active infant- any age, child -any age, and a Breastfeeding or Non-Breastfeeding woman participant (recommend searching by DOB).

(Write down the PID Number. This same participant will be used throughout this guidebook and in the Issuance Guidebook later.)

- PID: _____ Infant
- PID: _____ Child
- PID: _____ Women

Steps Outlined:

- NOTE: You will need to complete the BF% tab for the infant.
 - Go to Nutrition Assessment
 - Select Health Assessment
 - Select the Breastfeeding % tab
 - On the drop-down list, select 0%
 - Save
- Click on eWIC Benefits in the left navigation pane.
 - Note: if the participant has food packages already assigned for the current month please try to assign future months.
- Assign Food Package screen appears.
 - Assign the computer-generated base food package for the participant.
 - Click save and look at the name of the package after it's saved.
 - Practice tailoring with the Tailor button at the right side of the screen 
 - For the infant, practice replacing the standard infant formula with a soy-based formula in the tailor screen.

- Click save after tailoring (look at the name of the package after it's saved) and view  the food package after changes are made.
- For the child, practice replacing the current milk assigned for evaporated or powdered milk.
 - Click save after tailoring (look at the name of the package after it's saved) and view  the food package after changes are made.
- For the women, practice removing the cheese and yogurt and replacing it with more milk.
 - Click save after tailoring (look at the name of the package after it's saved) and view  the food package after changes are made.

Have the learner move on to the next module if no questions.

Module 3: MD Doc Special Authorization



Activity 2

The learner will be asked to go to the WIC Website and review the QRC for entering a Special Authorization into the WIC computer system. Found at WIC.dhw.idaho.gov at WIC > Staff > Training > QRC > Food Benefits. For a formula, nutritional, and/or food package changes that require an MD Doc only, the minimum documentation includes the diagnosis displayed on the MDF form.

The learner will ask for your assistance with finding a 4 m/o participant in the WIC computer system training environment to practice entering an MD Doc written and verbal special authorization (recommend searching by DOB, can use a three to five (3-5) m/o if needed).

Explain the products that require an MD Doc special authorization only:

1. VOC MDF (See policy IWPPM Ch. 7).
2. Removing baby food for ages 6 - 12 months.

Ensure the learner understands that some MD Docs require an RD Approval in combination to be issued and those products will be covered later in this guidebook.

Scenario: A four (4) m/o infant is having increased issues with gas and fussiness. The infant's medical provider completed an MDF for Similac Sensitive and the family brought in the MDF. This requires an MD Doc special authorization.

Assist the learner with finding an active infant participant that is four (4) m/o (recommend searching by DOB, can use a three to five (3-5) m/o if needed).

- PID: _____

Steps Outlined:

Have the learner complete the steps outlined below and be ready for questions if they have issues.

- Click on eWIC Benefits in the left navigation pane.
- NOTE: You will need to complete the BF% tab for the infant.
 - Go to Nutrition Assessment
 - Select Health Assessment
 - Select the Breastfeeding % tab
 - On the drop-down list, select 0%
 - Save
- Go to Special Authorization screen.
 - Click the button ADD SPECIAL AUTHORIZATION.
 - Create a special authorization for a verbal MD Doc first and then a written MD Doc. (The Verbal MD Doc will auto populate an expiration date for 30 days out. When entering the written MD Doc, ensure the effective date is 1 day after the inactive date of the verbal MD Doc.) *(Please ensure the learner entered the minimum required documentation into the MD Doc Special Authorization Screen.)*
- Ensure the learner practices completing both written and verbal MD Docs. The minimum documentation required to include in the Reason box is the diagnosis from the MDF. Optional documentation can include the name of the formula. If the name of the formula is documented, ensure the learner knows that a new MD Doc will have to be entered if a medical provider changes the formula or nutritional. Please check with your agency to determine how MD Docs should be documented. Some agencies may require other components in addition to the state requirements.

Add Special Authorization

Type*	Effective Date*
<input type="text" value="MD Doc"/>	<input type="text" value="12/30/2019"/>
MD Doc Status*	Inactive Date*
<input type="text" value="Written"/>	<input type="text" value="12/30/2020"/>
Reason*	
<input type="text" value="increased fussiness and gas"/>	

Add Special Authorization

Type*
MD Doc

Effective Date*
12/30/2019

MD Doc Status*
Verbal

Inactive Date*
01/29/2020

Reason*
increased fussiness and gas

SAVE CANCEL

Note: When you go to the Assign Food Package screen, and select a package from drop-down and click the Tailor button, boxes will display at the top with an **M**. Check this box and you will see items with a small **M** next to it in order to tailor the package with the special authorization selected used.

Have the learner move on to the next module if no questions.

Module 4: RD Approval Special Authorization



Activity 3

The learner will be able to refer to the QRC previously reviewed for entering special authorizations, if needed. Found at WIC.dhw.idaho.gov at WIC > Staff > Training > QRC > Food Benefits. For different milks, and ready-to feed-formulas that require an RD Approval special authorization only, the minimum documentation includes the diagnosis and the RD's names giving the approval. Ex. Lactose intolerant. Sally Sue RD, LD.

Ensure the learner understands the difference between the RD Approval Special authorization and RD Approvals.

Notes:

1. See the Summary of Milk Issuance document for details about different milk that are offered by the WIC program. WIC > Staff > Training > Special Authorization > Summary of Milk issuance. <https://healthandwelfare.idaho.gov/FoodCashAssistance/WIC/Staff/tabid/3350/Default.aspx>
2. Ready-to-feed contract formulas require an RD Approval special authorization, even though they are included on the options/tailoring for homeless food packages.

Clarification: An **RD Approval Special Authorization** and an **RD Approval** are two separate things. The medical foods/ exempt formulas and nutritionals are broken down into two subgroups **Low-Risk Food items and or formula** and **High-Risk Medical Foods/ exempt formulas/ nutritionals**.

1. **RD Approval Special Authorization**- is simply a special authorization entered into the WIC computer system.
2. **RD Approval**- is the RD's review of the participant and the proof (documentation) that they reviewed the participant's information.

The food items listed below require an **RD Approval Special Authorization** and an **RD Approval** and are considered **Low-Risk food items** when provided by themselves and when not in conjunction with high-risk NRC or referrals.

- soy-based beverage
- acidophilus milk
- goat's milk
- Lactose reduced/free milk
- 2% milk
- ready-to-feed (RTF) contract formula*

*Ready-to-feed (RTF) requires no mixing before feeding. Ready-to-feed should be issued very rarely.

RTF is only issued with Special Authorization- RD Approval from a local agency dietitian under specific circumstances. The reasons for providing the RTF are as follows:

- unsafe water supply
- lack of refrigeration
- the participant is homeless
- the infant's caregiver has difficulty correctly mixing concentrate or powder formula

The learner will ask for your assistance finding a 2 y/o participant in the WIC computer system training environment to practice entering an RD Approval special authorization (recommend searching by DOB.)

Scenario: A two (2) y/o participant is not tolerating cow's milk and mom has requested soymilk. You have RD Approval. Create a special authorization to include soymilk in their food package for future months.

Assist the learner with searching for an active 2 y/o C participant (recommend searching by DOB)

○ PID: _____

Steps Outlined:

Have the learner complete the steps outlined below and be ready for questions if they have issues.

- Note: You may need to void future benefits for all family members.
- Click on eWIC Benefits in the left navigation pane.

- Go to Special Authorization screen.
 - Click the button ADD SPECIAL AUTHORIZATION.
 - Create a special authorization for RD Approval (this will allow the RD Approval food package options in tailoring). (Please ensure the learner entered the minimum required documentation into the RD Approval Special Authorization Screen).

Please review how the RD Approval is documented in the WIC computer system. For different milks and ready-to feed formulas that require an RD Approval special authorization only, the minimum documentation includes the diagnosis and the RD's names giving the approval (ex. Lactose intolerant. RD Approval, Sally Sue RD, LD). Please check with your agency to see how RD Approvals should be documented if additional components are desired that are different from the state requirements.

Add Special Authorization

<p>Type*</p> <div style="border: 1px solid #ccc; padding: 2px;">RD Approval ▼</div>	<p>Effective Date*</p> <div style="border: 1px solid #ccc; padding: 2px;">12/30/2019</div>
	<p>Inactive Date*</p> <div style="border: 1px solid #ccc; padding: 2px;">06/30/2020</div>
<p>Reason*</p> <div style="border: 1px solid #ccc; padding: 2px;">Lactose intolerance, Sally Sue RD <u>LD</u></div>	

Note: When you go to the Assign Food Package screen, and select a package from drop-down and click the Tailor button, boxes will display at the top with an R. Check this box and you will see items with a small R next to it in order to tailor the package with the special authorization selected.

Have the learner move on to the next module if no questions.

Module 5: MD Doc Special Authorization and separate RD Approvals



Activity 4

Please ensure the learner understands the MD Doc Special Authorizations and separate RD Approvals.

The learner will be able to refer to the QRC previously reviewed for entering special authorizations, if needed. Found at WIC.dhw.idaho.gov at WIC > Staff > Training > QRC > Food Benefits.

The following food items below are consider High-Risk Medical Foods/ exempt formulas. These items will require an MD Doc Special Authorization and an RD Approval documented into the WIC computer system.

- Any exempt infant formula
- Any WIC-eligible nutritional
- Any authorized supplemental food outside the participants standard food package
- Infant formula prescribed to a child
- Tailoring with whole milk for children between 2 to 5 and women

Note: For whole milk to be issued to a child ages 2-5 or a woman, a formula and / or nutritional must also be issued. See the Summary of Milk Issuance document for details. WIC > Staff > Training > Special Authorization > Summary of Milk issuance. <https://healthandwelfare.idaho.gov/FoodCashAssistance/WIC/Staff/tabid/3350/Default.aspx>

The learner will ask for assistance with finding a 6 m/o infant.

Scenario: A six (6) m/o infant is not tolerating Similac Sensitive and needs a more specialized formula. The infant needs Similac Alimentum formula according to the medical provider's MDF. This formula requires both an MD Doc and an RD Approval Special Authorization.

Assist the learner with searching for an active infant participant that is six (6) m/o (recommend searching by DOB, can use a seven to eleven (7-11) m/o if needed).

- PID: _____

Steps Outlined:

Have the learner complete the steps outlined below and be ready for questions if they have issues.

- Click on eWIC Benefits in the left navigation pane.
- NOTE: You will need to complete the BF% tab for the infant.
 - Go to Nutrition Assessment
 - Select Health Assessment
 - Select the Breastfeeding % tab
 - On the drop-down list, select 0%
 - Save
- Go to Special Authorization screen.
 - Click the button ADD SPECIAL AUTHORIZATION.
 - Create a special authorization for RD Approval and MD Doc (this will allow the RD Approval and MD Doc food package options in tailoring).
 - Practice entering a dual special authorization both ways described above. (Please ensure the learner entered the minimum required documentation into the MD Doc Special Authorization Screen.)

When a product requires an MD Doc Special Authorization and an RD Approval, please ensure you pay close attention to how the special authorizations are documented in the WIC computer system.

1. The MD Doc special authorization required in conjunction with an RD Approval special authorization can be completed from the MD Doc screen. If this option is chosen the reason must include the diagnosis (on the MDF), RD approval, and the RD's name.

Add Special Authorization

Type*	MD Doc	Effective Date*	12/30/2019
MD Doc Status*	Written	Inactive Date*	12/30/2020
Reason*	FTT, GI Disorder <u>Crohn's</u> disease, RD Approval- Sally Sue RD <u>LD</u>		

Note: When you go to the Assign Food Package screen, and select a package from drop-down and click the Tailor button, boxes will display at the top with an **M** . Check these boxes and you will see items with a small **M** next to it in order to tailor the package with a special authorization selected.

Have the learner move on to the next module if no questions.

Module 6: Homeless Special Authorization



Activity 5

Ensure the learner understands the Homeless food package options. The learner can refer to the QRC previously reviewed for entering special authorizations, if needed. Found at WIC.dhw.idaho.gov at WIC > Staff > Training > QRC > Food Benefits.

Note: Ready-to-feed contract formulas require an RD Approval special authorization, even though they are included on the options/tailoring for homeless food packages.

The learner will ask for assistance with finding a (P) Pregnant participant (Try search by date of birth).

A pregnant participant is living with a friend in a temporary living situation and she may stay with another friend soon. She has limited refrigerator space at both places. Create a special authorization for a homeless participant and tailor a homeless food package.

Search for an active P participant (recommend searching by DOB).

- o PID: _____

Steps Outlined:

- o You will need to edit the family info to make the family Homeless.

Edit A Family

All required fields are marked with an asterisk(*).

Responsible Adult: This is a Foster family.

How did you learn about WIC?

First Name:* MI: Last Name:* Suffix: Maiden Name (if any): Date of Birth*:

Homeless?

- No
- Yes

Physical Address:

Street:* Zip:* City:* County:* State:*

RA Name: Betty Boop	DOB: 5/26/1992	Phone: (121) 212-1212	Address: 1234 The 50'S Cars Malad City, ID 83252	Authorized Signer:
Income Determination: 11/21/2019	Migrant: N	Foster Family: N	Homeless: Y	Referrals: RD, FS, AF, MA, SA

Edit Family Info

Add Participant

Income Determination

Transfer

Transfer History

Appointments

Clinic Transfer

Note: You may have to void future benefits for all family members in order to issue a new package.

- Click on eWIC Benefits in the left navigation pane.
- Go to Special Authorization screen
 - o Click the button ADD SPECIAL AUTHORIZATION.

- Create a special authorization for Homeless (this will allow the Homeless food package options in tailoring).

Note: When you go to the Assign Food Package screen and, select a package from drop-down and click the Tailor button, boxes will display at the top with a **H**. Check these boxes and you will see items with a small **H** next to it and this is how in order to tailor the package with a special authorization used. Remember you can tailor milks to another form of milk without a Homeless Special Authorization.

Have the learner move on to the next module if no questions.

Module 7: Proration



Activity 6

The learner will need to review the circumstances around when to prorate a food package at your clinic. Please provide them with your clinic's procedure and review it with them.

If it is after the midpoint of the month, have them try practicing prorating and not prorating a package with the participants above.