

Dyad, Certification and Issuance: Frequently Asked Questions

How do I...Create the Mother-Infant Dyad?

For information on how to create a mother-infant dyad, refer to ADP Manual, Chapter 1, Section 10.

As detailed above, the mother-infant dyad is a link that is set up in HSIS Screen 01-Patient Master in the Family ID field. The mother's Patient ID number can be entered or will be automatically populated into the mother's Family ID field. The user must enter the mother's Patient ID number in the infant's Family ID field on the infant's Patient Master.

- Create the Mother's WIC ADP System Patient Master Screen 01, including a Family ID, Then complete her WIC Certification Record Screen 20.
- Create the infant's Patient Master Screen 01, entering the same Family ID as his mother. This creates a link between the mother's and infant's records and establishes the dyad.
- Complete the infant's WIC Certification Record Screen 20, including entering a Feeding Option. The Feeding Option entered into the infant's WIC Certification record drives the infant and mother's food package.
- After the infant's WIC Certification Screen 20 is completed, go back into the mother's WIC Certification Screen 20 to confirm the feeding option. This is done by entering a C in the Action Code Field and pressing the **ENTER** key.

How do I...Change a Woman's Feeding Option from Partially to Fully Breastfeeding?

The mother's and infant's records are now part of a dyad, linked by the Family ID. When the infant's feeding option is changed on Screen 20, the mother's feeding option will reflect the change upon confirmation as reviewed above. Take the following steps to successfully change a woman from a partially to a fully breastfeeding food package:

1. Navigate to the infant's Screen 20 - HSA200B WIC Certification record:
 - a. Action field = C.
 - b. Enter C in the Action Code Field
 - c. Change the Feeding Option field from P for Partially Breastfeeding to F for Fully Breastfeeding
 - d. Delete any entry in the Formula Code and Formula Type Fields
 - e. Press the **ENTER** key when finished.

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HSA200B 07501 N.C. HSI - WIC FOOD/INFANTS AND CHILDREN ADDED: 10/02/10
10/02/10 NC03 CHANGED: 10/02/10
NEXT ENTRY=> COUNTY 085 SCREEN 20 ID DATE ACTION I
MESSAGE: 010 ENTER NEXT KEY

NAME: TEST INFANT PAT #: TI0627102H DOB: 06272010

FORMULA W/C FPIII ISSUE ODD/ SITE SOY LACTOSE TOFU VEGAN
CODE TYPE N DAY EVEN 01 BEVERAGE F/R N N
- - - - -

FAMILY ID GUARDIAN NAME
TM0717902H TEST, MOTHER

BIRTH WEIGHT FEEDING AGE BREASTFEED AGE FORMULA
LBS OZS GRAMS OPTION DISCONTINUES (WKS) GIVEN (WKS)
07 07 3374 F 04 04

BF UPDATE DATE
10 / 02 / 10
  
```

2. Next navigate to the mother's Screen 20 – HSA200D WIC Certification record:
 - a. Action field = C.
 - b. Enter C in the Action Code field to confirm the Dyad has changed from Partially to Fully Breastfeeding
 - c. Press **ENTER** when finished making changes.
 - d. The MESSAGE at the top of the page should display: 022 RECORD HAS BEEN CHANGED - ENTER NEXT KEY

The infant and mother will now be issued a Fully Breastfeeding Food Package as displayed below.

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HSA200D 07501 N.C. HSI - WIC FOOD/PREGNANT OR POSTPARTUM ADDED: 10/02/10
10/02/10 NC03 CHANGED: 10/02/10
NEXT ENTRY=> COUNTY 085 SCREEN 20 ID DATE ACTION C
MESSAGE:

NAME: TEST MOTHER PAT #: TM0717902H DOB: 07171990

FORMULA W/C FPIII ISSUE ODD/ SITE SOY MOM LACTOSE TOFU VEGAN
CODE TYPE N DAY EVEN 01 BEVERAGE MULTI F/R N N
- - - - -

PREGNANT WOMEN
EST DATE PN CARE PREG WT PRE-PREG HABITS CURRENT HABITS DECR
DELIVERY ENTRY DATE LBS CIGS DAYS DRINKS CIGS DAYS DRINKS SMOKE
062510 041510 125

POST PARTUM WOMEN
DATE OF DELIVERY DEL WEIGHT OUTCOME NUMBER INFANTS INF BIRTH WT FEEDING
LBS LBS LBS INFANTS LBS OZ GR OPTION
062710 145 L 1 07 07 3374 F

AGE BFEED AGE FORMULA DECR BF UPDATE
DISC (WKS) GIVEN (WKS) SMOKE DATE
04 04 8 10 / 02 / 10
  
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Infant Participant Changed from a Partially to a Fully Breastfeeding Food Package

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HSA211H                NORTH CAROLINA HSIS - WIC SYSTEM
                        STANDARD VOUCHER ISSUANCE
MESSAGE: 738 NO PACKAGE FOR FULLY BFEED INFANT UNDER 6 MOS

NAME: TEST, INFANT          PGM/SITE: 07501      WIC ID: 062710
FORM OF FORMULA            OCTOBER 10  NOVEMBE 10  DECEMBE 10  CVV
FOOD OR FORMULA            DEL   1  2  3  4  5  6  7  8  9 10 11 12 13 14 15

-

FI STATION: 99  1ST FI: 90035545  PRINTER: NDFP0040  PRINT:OVERRIDE? N OK? N
  
```

Mother Participant Changed from a Partially to a Fully Breastfeeding Food Package

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HSA211H                NORTH CAROLINA HSIS - WIC SYSTEM
                        STANDARD VOUCHER ISSUANCE
MESSAGE: 231 VERIFY - CHG IF NEEDED - ANSWER QUESTIONS - "ENTER" OR PF2 TO EXIT

NAME: TEST, MOTHER          PGM/SITE: 07501      WIC ID: 023123
FORM OF FORMULA            OCTOBER 10  NOVEMBE 10  DECEMBE 10  CVV
FOOD OR FORMULA            DEL   1  2  3  4  5  6  7  8  9 10 11 12 13 14 15
MILK - GALLON              -    02 02 02      02 02 02      02 02 02
CEREAL - OUNCES            -    36                36                36
48 OUNCE JUICE              -    01 01 01      01 01 01      01 01 01
CHEESE                      -    01                01                01
EGGS - DOZEN                -    01 01          01 01          01 01
FISH                        -    30                30                30
BEANS/PEAS                  -    01                01                01
PEANUT BUTTER                -    01                01                01
WHOLE GRAINS                 -    01                01                01
FRUITS & VEGETABLES        -                               10 10 10

      CHEESE      _  _  _  TOFU
      UHT         _  _  _  EVAP MILK  _  _  _  WHL MILK  _  _  _  INCRSD TOFU  _

FI STATION: 99  1ST FI: 90035545  PRINTER: NDFP0040  PRINT:OVERRIDE? N OK? N
  
```

How do I...Issue to an Infant if the Mother is NOT on WIC?

It is possible to issue to an infant if the mother is not on WIC. No dyad will be established.

- Begin by adding the infant's Master Screen 01 and leaving the Family ID blank.
- Press the **ENTER** key.
- An informational message "Family ID Invalid – Please enter Mom's ID" will appear at the top of screen and "NO MOM ID" will appear in Family ID field.
- The informational message above will continue to display at the top of the following WIC screens – 20, 21, 18, and 53.

To confirm that the infant is alone on WIC, press **ENTER** again and an informational message will be displayed at the top of the screen as follows "Family ID Invalid – Please enter Mom's ID". Assign and issue food package based on feeding option.

How do I...Issue to a Mother that Cannot Yet Certify her Infant, but is Fully or Partially Breastfeeding?

If a mother is on WIC alone there is not a dyad to establish. Add the mother's Master Screen 01 and the mother's Patient ID will auto-populate as her Family ID. The Feeding Option will automatically be assigned N for non-breastfeeding. When issuing, the WIC ADP System only prints the post partum food package.

However, if a mother is fully or partially breastfeeding and her infant is still in the hospital, issue her the appropriate preprinted FIs for a fully or partially breastfeeding woman.

How do I...Establish the Dyad when the Mother is not Yet Due for Postpartum Recertification?

If a mother is a WIC participant but not yet due for postpartum recertification, follow these steps to enroll her newborn infant on WIC.

Infant

- Add the newborn infant, but do not enter a FAMILY ID on Screen 01
- Certify the infant and enter the FEEDING OPTION
- Issue the food package

Mother

- Keep the mother certified on prenatal A- codes
- Do not enter pregnancy outcome data or FEEDING OPTION
- Issue FIs (will print with prenatal food package)
- Give an appointment for postpartum recertification

How do I...Issue Formula and Other Products?

Refer to the Screen 20 – WIC Certification Required Fields Reference above to better understand appropriate Formula Code and Type Field entries.

Some simple issuance rules to remember:

- The WIC ADP System will automatically prorate late issuance of formula and foods.
- The WIC ADP System will assign exact number of containers for full nutritional benefit, when necessary alternating number of containers by odd and even months.
- Based on the CPA's assessment of the participant's need, the WIC ADP System provides the option to issue 1/3 or 2/3 of the maximum monthly allowable amount of formula. Enter Issue 1/3 Max or Issue 2/3 Max on the Issuance Screen (21) for an infant, a woman on FP III or child on FP III when the CPA has prescribed a reduced food package.

Do not use the 1/3 or 2/3 issuance feature as a means to prorate issuance for late pickup.

For additional information on Contract and Exempt Formulas, please refer to the WIC Program Manual Chapter 7, Attachment I.

How Do I...Review the Past Food Instrument Issuance?

It is a best practice to review past FI issuance before issuing more FIs to a participant. The WIC ADP System provides this functionality on Screen 21-HSA214A – Voucher Inquiry Screen.

Screen 21 – HSA210A – is the first Screen you see when you enter Screen 21. To Display vouchers issued, type the letter X on the line next to the “DISPLAY VOUCHERS ISSUED” option and press the **ENTER** key.

Screen 21 – HSA210A – Voucher Issuance

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HSA210A  00302          NORTH CAROLINA HSIS - WIC SYSTEM          SCCA
08/27/09          VOUCHER ISSUANCE

NEXT RECORD: COUNTY: 060  SCREEN: 21  ID:          DATE:          ACTION: I
MESSAGE

NAME: TEST, MOM          PGM/SITE: 00302  WIC ID: 432789
CYCLE: 2 DAY: 10 LAST DATE ISSUED 08/10/09 THRU 10
ACTION DUE: 02/01/10 T  HIGH RISK:  DOB: 07251972  MSG:

PLACE AN 'X' BY MENU ITEM CHOICE:

- STANDARD VOUCHER ISSUANCE STARTING AT MONTH __ FOR __ MONTHS
- REPLACE VOUCHER(S) _____
- VOID VOUCHER(S) _____ REASON _ _____ REASON _
  _____ REASON _ _____ REASON _
x DISPLAY VOUCHERS ISSUED
= NOT AVAILABLE - RESERVED FOR FUTURE USE
- PREPRINTED MANUAL FOOD INSTRUMENT ISSUANCE
- NOT AVAILABLE - RESERVED FOR FUTURE USE
- NUTRITIONAL EDUCATION DOCUMENTATION
- ISSUANCE PICKUP
- DISPLAY VOUCHER _____
- UNVOID NON-ISSUED PREPRINTED MANUAL FOOD INSTRUMENT _____
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Screen 21 – HSA214A – Voucher Inquiry

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HSA214A  04801      NORTH CAROLINA HSI - WIC SYSTEM
09/05/09      VOUCHER INQUIRY
SCCA
NEXT RECORD: COUNTY: 096  SCREEN: 21  ID: _      DATE:      ACTION: I
MESSAGE: 014 NO MORE RECORDS ON FILE - ENTER NEXT KEY

NAME: SHOE, OLD WOMAN      PGM/SITE: 04801  WIC ID: S34567
CYCLE: 3 DAY: 08 ACTION DUE: 09/02/10 T  LAST ACTION: 09/04/09 A

      GIVEN  FIRST FI #      MONTH 1      MONTH 2      MONTH 3      #VOID WMRX
09/05/09  19176048 A      09/08      10/08      11/08
      COMMENT: SCHEDULED      NUTRI EDU: Y  TYPE: STD ISSUE
  
```

Screen 21 – HSA214A shows:

- Dates FIs were issued to this participant. Below each date is a line that displays any issuance comments, an indication of nutrition education given, and the type of issuance.
- The first FI number issued on that date.
- Three columns listing the issue month (1, 2, 3), date that a FI was issued.
- To review more detail about the foods issued and/or invalidations place the cursor under the issuance date and press the **ENTER** key.

Screen 21 – HSA214B – Voucher Inquiry

Screen 21 HSA214B or the Voucher Inquiry B Screen displays the details of the issuance that user has requested to review.

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HSA214B  04801      NORTH CAROLINA HSI - WIC SYSTEM
09/05/09      VOUCHER INQUIRY
SCCA
NEXT RECORD: COUNTY: 096  SCREEN: 21  ID: _      DATE:      ACTION: I
MESSAGE: 011 RECORD REVIEW ONLY

NAME: SHOE, OLD WOMAN      PGM/SITE: 04801  WIC ID: S34567
FOOD VOUCHERS FOR ISSUE DATE 09/08/09  NUTRI EDU: Y CODE: 12 STF: RKB 090409

      ITEM      F11 F12 F13 F14  CVV  TOTAL
19176048 A      MILK - GALLON      02      02      04
19176049 A      EGGS - DOZEN      01      01      01
19176050 A      CEREAL - OUNCES      36      36
      JUICE      01 01 01      03
      BREAD/TORTILLA/RICE      01      01
      BEANS      01      01
      PEANUT BUTTER      01      01
      MILK - 1 1/2 GALLON      01      01
      CVV - FRUITS VEGS      08
  
```

Screen 21 – HSA214B – provides an issuance record review which includes information regarding the participants:

- Issue date
- If Nutrition Education was provided and education code
- Initials of staff member who provided education
- FIs and Cash-Value Vouchers (CVV) numbers
- Food items issued and how they were distributed across FIs and CVVs
- Total quantity of each food items issued

How Do I...View the Family WIC Participants?

The participant's WIC Summary Page – Screen 24 provides information from the participant's Patient Master (Screen 01), WIC Certification (Screen 20), Issuance (Screen 21) and Appointments Records (Screen 18) in one report. In addition to printing, the user can now display the participant's WIC Summary Sheet; this allows the user to review all WIC participants linked to the same Family ID on the Screen, without having to print.

```
HSA240F  SCCA  NORTH CAROLINA HSI - WIC SUMMARY PAGE  
08/25/09  SELECTION SCREEN  
  
NEXT RECORD: COUNTY: 060  SCREEN: 24  ID:  DATE:  ACTION: S  
MESSAGE: 111 PRESS "ENTER" TO PRINT WIC SUMMARY PAGE -OR- ENTER NEXT KEY  
733 ENTER ACTION = S TO VIEW SUMMARY ON SCREEN  
  
PRINTER: NAAP855E
```

To display the WIC Summary Page or WIC Summary Sheet, enter the following information on the control line:

- Screen = 24
- ID = Participant's Patient Master ID number, or two-digit WIC program number plus six-digit WIC ID number (with 9th position spaced)
- Date may be left blank
- Action Code = S

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- Press the **ENTER** key.

Press F8 to page down to review the Family Member Listing:

APPT	DATE	TIME	A/P	TYPE	ATTENDED
NOTICE TYPE FAMILY MEMBERS FIRST WIC ID ISS. DUE					
	SHOE			AMANDA	A45678 04 3 09/02/10
	SHOE			JIMMY	J56789 04 3 03/04/10
	SHOE			OLD WO	S34567 08 3 09/02/10

SUMMARY PRINTED 09/05/09

PRESS PF3 TO RETURN TO HS24 PRESS PF7 FOR PRIOR SCREEN

How do I...Preprint FIs and CVVs on Screen 26?

To navigate to the Screen 26 HSA264A to preprint FIs and CVVs:

- Navigate to Screen 26 (HSA260A) on the WIC Special Site Menu
- Enter P in the Action field
- Enter X on the line next to PREPRINT MANUAL FIS
- Press the **ENTER** key.

Screen 26 – HSA260A – WIC Special Site Menu

HSA260A	00302	NORTH CAROLINA HSIS - WIC SYSTEM		SCCA	
08/27/09		WIC SPECIAL SITE MENU			
NEXT RECORD:	COUNTY: 060	SCREEN: 26	ID:	DATE:	ACTION: P
MESSAGE:					
—	ISSUANCE BY MONTH FOR PROGRAM: ___ SITE: ___ OR STATE: ___ FOR TIME PERIOD YYMM THRU YYMM (SUMMARY)				
—	ISSUANCE BREAKDOWN FOR TIME PERIOD YYMM THRU YYMM FOR PROGRAM: ___ SITE: ___ OR STATE: ___				
—	VOUCHER INVENTORY - PROGRAM/SITE INQUIRY/UPDATE				
—	VOUCHER FORMS ALIGNMENT/VERIFICATION FOR STATION: ___				
x	PREPRINT MANUAL FOOD INSTRUMENTS				
=	SPECIAL FORMULA INVENTORY (NOT AVAILABLE)				

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HSA264A  07501  NORTH CAROLINA AUTOMATED WIC SYSTEM  NC03
10/16/10  PREPRINT MANUAL FOOD INSTRUMENTS

NEXT RECORD: COUNTY: 085  SCREEN: 26  ID:  DATE:  ACTION: P
MESSAGE:

OPTION  ALLOWED MAXIMUM
-  INFANT FULLY FORMULA FED(BIRTH - 3 MONTHS) POWDER  FORMULA CODE  --  13
-  INFANT FULLY FORMULA FED(4 - 5 MONTHS) POWDER  FORMULA CODE  --  13
-  INFANT FULLY FORMULA FED(6 - 11 MONTHS) POWDER/FOOD  FORMULA CODE  --  06
x  INFANT PARTIALLY FORMULA FED(BIRTH - 1 MONTH) POWDER  FORMULA CODE  B1  27
-  INFANT PARTIALLY FORMULA FED(1 - 3 MONTHS) POWDER  FORMULA CODE  --  13
-  INFANT PARTIALLY FORMULA FED(4 - 5 MONTHS) POWDER  FORMULA CODE  --  13
-  INFANT PARTIALLY FORM FED(6 - 11 MONTHS) POWDER/FOOD  FORMULA CODE  --  06
-  INFANT FULLY BREASTFED (6 - 11 MONTHS) FOOD  13
-  CHILD FP IV W/CVV (WHLMLK _ ) 09
-  PREGNANT/PARTIALLY BREASTFEEDING WOMAN FP V W/CVV (WHLMLK _ ) 06
-  POSTPARTUM WOMAN FP VI W/CVV (WHLMLK _ ) 09
-  FULLY BREASTFEEDING OR PREGNANT W/MULTIPLES FP VII W/CVV (WHLMLK _ ) 06

NUMBER OF PACKAGES TO PRINT: 27  NOT TO EXCEED ALLOWED MAXIMUM
FI STATION: 99  PRINTER: NDFP0040
1ST FI NUMBER: 90035539  OK TO PRINT? Y  PRINT OVERRIDE? N
  
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Remember to do the following:

- Replace short receipt paper with plain 8 1/2 x 11 size paper in the receipt tray.
- Enter X on the line next to the preprint option you require
- If needed, enter the 2-digit formula code of the approved contract formula to the right of the preprint option selected. Note the formula options that can currently be preprinted include: N1 = Enfamil PREMIUM, B1= Enfamil ProSobee, M1 = Enfamil Gentlease.
- If you would like to print less than the maximum number of Preprinted Food Packages, indicated to the right of the Food Package description, type in the 2-digit number of desired food packages next to Number of Packages to Print towards the bottom of the Screen. The maximum number corresponds with the number of food packages that will completely fill one page of an issuance log.
- Enter Y beside the WHLMLK for all food packages to print with the whole milk option.
- Enter Y next to OK to Print and press the **ENTER** key.
- FIs will print, but the printer will beep for the feed button to be pushed so the printer can start printing the preprinted log page.
- FIs will print first, from the first MICR tray.
- CVVs will print next, from the second MICR tray.
- Log will list each set of FIs (and the CVV for that package, if included)
- Store each set of FIs and CVV together

For additional information about food packages, refer to the WIC Program Manual, Chapter 7: Food Package, Attachment 2.

Note: Printer override is only used if the MICR printer node name needs to be changed.

How do I...Order Formula from the Nutrition Services Branch (NSB)?

There are two different situations where a formula would be ordered from NSB; when a formula cannot be issued through the ADP System and must be ordered from NSB, or when a local agency chooses to order the formula from NSB because the product cannot be obtained from a local WIC vendor.

Formula that must be ordered from NSB cannot be issued by the ADP System. When these formulas are selected on Screen 20, Screens HSA211A and HSA211C will display the following “formula must be obtained from the state office”.

When a local agency chooses to order a formula from NSB, enter an X on the ORDER FR NSB indicator line on Screen 21 – HAS211H.

In both situations the ADP System will:

- Display formula quantity of 99 for any product ordered from NSB on Screen 21 HSA211H
- Print one FI listing “issued product obtained from state office”
- Print a receipt for participant to sign.

How do I...Issue a Food Package when a Participant is 10-19 or 20 or More Days Late?

In cases where the participant picks up late, when a new participant is added 10 or more days past the family issuance date, or when formula in FP III is changed 10 or more days past the original issued date, the ADP System will automatically prorate the issuance. The participant will receive approximately 2/3 of a package when 10-19 days late and approximately 1/3 of a package when 20 or more days late.

How do I...Issue to a Participant at the End of Categorical Eligibility?

If a participant is at the end of categorical eligibility and the participant’s certification will expire in less than one month, the system will not automatically prorate. The user must:

- Prorate the number of FIs issued, until the recertification due date or the initial scheduled recertification appointment.
- Issue the CVV for the month.

If a participant is at the end of categorical eligibility which will expire in less than one month:

- Prorate the number of FIs issued, until the Termination Due date.
- Issue the CVV for the month.

Any unissued FIs must be voided in the ADP System. Stamp FIs void and document the void on the receipt.

How do I...Issue Less than the Maximum for a Partially Breastfed Infant?

If indicated by the CPA, to issue less than the maximum amount of formula for a partially breastfed infant, the user can select the 1/3 or 2/3 indicators on Screen 21 or issue the appropriate preprints from Screen 26.

How do I...Understand How the ADP System Calculates the Amount of Formula to Issue to an Infant?

The ADP System calculates the amount of infant formula to issue based on the infant's age at issue date:

Fully Formula Fed Infant Ages:

- 0-3 months (birth through end of 3rd month of life)
- 4-5 month (age 4 months through end of 5th month)
- 6-11 months (age 6 months through end of 11th month)

Partially Breastfed Infant Ages:

- 0-1 month (the initial month after birth)
- 1-3 months (age one month through end of 3rd month)
- 4-5 months (age 4 months through end of 5th month)
- 6-11 months (age 6 months through end of 11th month)

Refer to the WIC Program Manual Chapter 7, Attachment 1 for additional policy guidance.

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