

Increase or Add Formula After Issuance

After Food Instruments (FIs) have been issued and one or more FIs have been **redeemed** for the current month, the **Exchange/Increase Formula** quick link and screen will allow users to increase the amount of formula or WIC Eligible Nutritionals (WEN) provided to a participant for the current month or add a new formula/WEN for the current month. This feature will not be available on the same day the original food prescription is created, but can be used on the next day.

Scenario #1: Issuing Formula to a Fully Breastfed Infant

A dyad-linked mother whose Breastfeeding Status is Fully Breastfeeding received and used one or more food instruments during the current issuance month. Formula can be issued during the same issuance month to her infant whose Breastfeeding Status is Fully Breastfed.

Step 1: CPA updates Breastfeeding Information on the **Health Information** screen to include information on supplementation.

Step 2: CPA updates Infant's Food Prescription on the **Prescribe Food** screen. In this example, the infant's Breastfeeding Status is changing to Fully Formula Fed. It could have changed to Partially Breastfed ≤ MMA or Partially Breastfed > MMA.

▼ Food Prescription ?

11/28/2016 1 to 3 Months | **11/29/2016 1 to 3 Months** | 2/1/2017 4 to 5 Months | 4/1/2017 6 to 11 Months | 10/1/2017 12 to 23 Mo

Food Prescription Date 11/29/2016 + **WIC Category** Infant **Age Category** 1 to 3 Months **Breastfeeding Status** Fully Formula Fed **Family Issuance Day** 28 **Issuance Frequency** 1 Month(s)

▼ Food Prescription Items Total Items: 1 ?

Category	Subcategory	Quantity	Category Max Quantity	UOM
✖ Infant Formula (IF)	ABC milk-based powder 14 oz	806	806	Ounces

Step 3: CPA updates Woman's Food Prescription. In this example, Breastfeeding Status for the woman is now Fully Formula Fed.

▼ Food Prescription ?

11/28/2016 B | **11/29/2016 B**

Food Prescription Date 11/29/2016 + **WIC Category** Breastfeeding **Breastfeeding Status** Fully Formula Fed **Family Issuance Day** 28 **Issuance Frequency** 1 Month(s)

▼ Food Prescription Items Total Items: 6 ?

Category	Subcategory	Quantity	Category Max Quantity	UOM
Eggs	Grade "A" Large White Eggs	1	1	Dozen
Cereal (Adult)	Breakfast Cereal	36	36	Ounces
Legumes	Peanut Butter 16 - 18 oz	1	1	Containers
Fruit & Vegetables Cash Value	Fruit and Vegetables - Cash Value Voucher	\$11.00	\$11.00	\$\$\$
Juice - 48 oz	Juice 48 oz. or 11.5 - 12 oz. Concentrate	2	2	Containers
Milk Low Fat/fat free	Skim or 1% Milk	4	4	Gallons

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Step 4: Support Staff completes the **Exchange/Increase Formula** screen.

- Complete the **Select the Formula Being Returned** Food Category and Food Subcategory even though the participant is not returning any cans of formula or FIs. In this scenario, “Formula Being Returned” refers to the formula being added.
- **Enter Returned FIs** remains blank (the participant is not returning FIs).
- Complete the **Select the Replacement Formula** container, which includes the: **Food Category** and **Food Subcategory** dropdowns. In this scenario, “Replacement Formula” refers to the formula being added.
- Cans Originally Issued, Total Returned Cans, RFO Newly Prescribed, Cans Newly Prescribed, Cans After Proration, Total Cans, Maximum Prescribed RFO and Total RFO auto-populates.
- **Total Replaced Cans** auto-populates with the number of cans to be issued.

Step 5: Once the Support Staff selects **Save**, the user is given the option to use the Formula Wizard if product is in inventory. If product is not in inventory, the FIs with the added formula will automatically print. Support Staff obtains signature for new benefits.

Step 6: Support Staff returns to **Food Instrument List** and voids and reissues future months’ benefits for the entire family.

Increase or Add Formula After Issuance

Scenario #2: Issuing Additional Formula to an Infant Partially Breastfed < MMA

A dyad-linked mother with a Breastfeeding Status of Partially Breastfeeding < MMA received and used one or more food instruments during the current issuance month. Additional formula up to category max quantity can be issued during the same issuance month to her infant whose Breastfeeding Status is Partially Breastfed < MMA.

Step 1: CPA updates Breastfeeding Information on the **Health Information** screen.

Step 2: CPA prescribes additional infant formula on the **Prescribe Food** screen. In this example, formula increases from 200 ounces to 325 ounces. This changes the Breastfeeding Status of the infant from Partially Breastfed ≤ MMA to Partially Breastfed > MMA.

Food Prescription						
11/28/2016 6 to 11 Months		11/29/2016 6 to 11 Months		5/6/2017 12 to 23 Months		
Food Prescription Date	WIC Category	Age Category	Breastfeeding Status	Family Issuance Day	Issuance Frequency	
11/29/2016	Infant	6 to 11 Months	Partially Breastfed > MMA	28	1 Month(s)	
Food Prescription Items						
Category	Subcategory	Quantity	Category Max Quantity	UOM	Total Items: 3	
Infant Cereal	Infant Cereal, Plain, Dry	24	24	Ounces		
Infant Fruits and Vegetables	Infant Fruits & Vegetables	128	128	Ounces		
Infant Formula (IF)	ABC milk-based powder 14 oz	325	624	Ounces		

Step 3: CPA updates Woman's Food Prescription. Breastfeeding Status is now Partially Breastfeeding > MMA for future months' issuance.

Food Prescription						
11/28/2016 B		11/29/2016 B				
Food Prescription Date	WIC Category	Breastfeeding Status	Family Issuance Day	Issuance Frequency		
11/29/2016	Breastfeeding	Partially Breastfed > MMA	28	1 Month(s)		
Food Prescription Items						
Category	Subcategory	Quantity	Category Max Quantity	UOM	Total Items: 6	
Eggs	Grade "A" Large White Eggs	1	1	Dozen		
Cereal (Adult)	Breakfast Cereal	36	36	Ounces		
Legumes	Peanut Butter 16 - 18 oz	1	1	Containers		
Fruit & Vegetables Cash Value	Fruit and Vegetables - Cash Value Voucher	\$11.00	\$11.00	\$\$\$		
Juice - 48 oz	Juice 48 oz. or 11.5 - 12 oz. Concentrate	2	2	Containers		
Milk Low Fat/fat free	Skim or 1% Milk	4	4	Gallons		

Increase or Add Formula After Issuance

Step 4: Support Staff completes the **Exchange/Increase Formula** screen.

- Complete the **Select the Formula Being Returned** Food Category and Food Subcategory even though the participant is not returning any cans of formula or FIs. In this scenario, “Formula Being Returned” refers to the formula being increased.
- **Enter Returned FIs** remains blank (the participant is not returning FIs).
- Complete the **Select the Replacement Formula** container, which includes the: **Food Category** and **Food Subcategory** dropdowns. Since the participant is receiving an increased amount of formula, “Replacement Formula” refers to the type of formula being increased.
- Cans Originally Issued, Total Returned Cans, RFO Newly Prescribed, Cans Newly Prescribed, Cans After Proration, Total Cans, and Total RFO auto-populates.
- **Total Replaced Cans** auto-populates with the number of cans to be issued.

The screenshot displays the 'Exchange or Increase Formula' interface. The left sidebar contains a navigation menu with categories: Certification, Care Plan, Issue Benefits, Journal of Transactions, and Subsequent Certification. The main content area is titled 'Exchange or Increase Formula' and includes the following sections:

- Select the Formula Being Returned:** Features dropdowns for 'Food Category' (Infant Formula (IF)) and 'Food Subcategory' (ABC milk-based powder 14 oz), and a 'Quantity' field.
- Enter Returned Food Instrument(s):** A section for entering returned items, currently empty.
- Returned Food Instruments:** A table with columns for 'Serial #', 'Subcategory', and 'Quantity'. The table is currently empty, and the total items are 0.
- Select the Replacement Formula:** Features dropdowns for 'Food Category' (Infant Formula (IF)) and 'Food Subcategory' (ABC milk-based powder 14 oz), and a 'Total Replaced Cans' field showing '1'.
- Summary Statistics:** Cans Originally Issued: 3, Total Returned Cans: 0, RFO Newly Prescribed: 55.00, Cans Newly Prescribed: 1, Cans After Proration: 1, Total Cans: 1, Total RFO: 90.00.
- Buttons:** Formula Wizard, Save, and Cancel.

Step 5: Once the Support Staff selects **Save**, the user is given the option to use the Formula Wizard if product is in inventory. If product is not in inventory, the FIs with the increased formula will automatically print. Support Staff obtains signature for new benefits.

Step 6: Support Staff returns to **Food Instrument List** and voids and reissues future months' benefits for the entire family.

Increase or Add Formula After Issuance

Scenario #3: Issuing Additional Formula to an Infant Partially Breastfed > MMA

A dyad-linked mother with Breastfeeding Status Partially Breastfeeding > MMA received and used one or more food instruments during the current issuance month. Additional formula up to category max quantity can be issued during the same issuance month to her infant whose Breastfeeding Status is Partially Breastfed > MMA.

Step 1: CPA updates Breastfeeding Information on the **Health Information** screen.

Step 2: CPA prescribes additional infant formula on the **Prescribe Food** screen. In this example, formula increases from 600 ounces to 806 ounces. This changes the Breastfeeding Status of the infant from Partially Breastfed > MMA to Fully Formula Fed.

The screenshot shows the 'Food Prescription' interface. At the top, a navigation bar includes dates: 11/28/2016 (1 to 3 Months), 11/29/2016 (1 to 3 Months), 2/1/2017 (4 to 5 Months), 4/1/2017 (6 to 11 Months), and 10/1/2017 (12 to 23 Mo). Below this, the 'Food Prescription Date' is 11/29/2016. The 'WIC Category' is Infant, 'Age Category' is 1 to 3 Months, and 'Breastfeeding Status' is Fully Formula Fed. The 'Family Issuance Day' is 28 and 'Issuance Frequency' is 1 Month(s). The 'Food Prescription Items' table below shows one item: 'Infant Formula (IF)' with a quantity of 806, a category max quantity of 806, and a UOM of Ounces.

Category	Subcategory	Quantity	Category Max Quantity	UOM
Infant Formula (IF)	ABC milk-based powder 14 oz	806	806	Ounces

Step 3: CPA updates Woman's Food Prescription. Breastfeeding Status is now Fully Formula Fed for future months' issuance.

The screenshot shows the 'Food Prescription' interface after the update. The 'Food Prescription Date' is 11/29/2016, 'WIC Category' is Breastfeeding, and 'Breastfeeding Status' is Fully Formula Fed. The 'Family Issuance Day' is 28 and 'Issuance Frequency' is 1 Month(s). The 'Food Prescription Items' table below shows six items:

Category	Subcategory	Quantity	Category Max Quantity	UOM
Eggs	Grade "A" Large White Eggs	1	1	Dozen
Cereal (Adult)	Breakfast Cereal	36	36	Ounces
Legumes	Peanut Butter 16 - 18 oz	1	1	Containers
Fruit & Vegetables Cash Value	Fruit and Vegetables - Cash Value Voucher	\$11.00	\$11.00	\$\$\$
Juice - 48 oz	Juice 48 oz. or 11.5 - 12 oz. Concentrate	2	2	Containers
Milk Low Fat/fat free	Skim or 1% Milk	4	4	Gallons

Increase or Add Formula After Issuance

Step 4: Support Staff completes the **Exchange/Increase Formula** screen.

- Complete the **Select the Formula Being Returned** Food Category and Food Subcategory even though the participant is not returning any cans of formula or FIs. In this scenario, “Formula Being Returned” refers to the formula being increased.
- **Enter Returned FIs** remains blank (the participant is not returning FIs).
- Complete the **Select the Replacement Formula** container, which includes the: **Food Category** and **Food Subcategory** dropdowns. Since the participant is receiving an increased amount of formula, “Replacement Formula” refers to the type of formula being increased.
- Cans Originally Issued, Total Returned Cans, RFO Newly Prescribed, Cans Newly Prescribed, Cans After Proration, Total Cans, and Total RFO auto-populates.
- **Total Replaced Cans** auto-populates with the number of cans to be issued.

Exchange or Increase Formula

Select the Formula Being Returned

Food Category: Infant Formula (IF) | Food Subcategory: ABC milk-based powder 14 oz | Quantity: _____ Cans

Enter Returned Food Instrument(s)

Serial #: _____ | Add | Clear

Serial #	Subcategory	Quantity
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Total Items: 0

Cans Originally Issued: 7 | Total Returned Cans: 0
RFO Newly Prescribed: 206.00 | Cans Newly Prescribed: 3 | Cans After Proration: 3
Total Cans: 3
Total RFO: 270.00

Select the Replacement Formula

Food Category: Infant Formula (IF) | Food Subcategory: ABC milk-based powder 14 oz | Total Replaced Cans: 3

Formula Wizard | Save | Cancel

Step 5: Once the Support Staff selects **Save**, the user is given the option to use the Formula Wizard (if product is in inventory) OR the FIs with the increased formula will automatically print. Support Staff obtains signature for new benefits.

Step 6: Support Staff returns to **Food Instrument List** and voids and reissues future months’ benefits for the entire family.

Increase or Add Formula After Issuance

Scenario #4: Issuing Newly-Prescribed WEN to a Woman or Child

A woman or child has already received and used one or more food instruments for the current issuance month. Newly-prescribed WIC Eligible Nutritionals (WEN) can be issued during the same issuance month. In this example, WEN is added to a pregnant woman's food package. Follow the same steps if adding WEN to a child's food package.

Step 1: CPA adds WEN to the pregnant woman's food package and completes Medical Documentation screen.

Stone Family
Family ID: F04900006504
 146 Quartz Drive
 RURAL HALL, NC 27045



Sandy

Sandy T. Stone
Participant ID: 954492234M
Age: 26 years and 1 month
WIC Category: Pregnant

Food Prescription ?

11/28/2016 11/29/2016

Food Prescription Date
 11/29/2016

WIC Category
 Pregnant

Family Issuance Day
 28

Issuance Frequency
 3 Month(s)

Food Prescription Items Total Items: 9 ?

Category	Subcategory	Quantity	Category Max Quantity	UOM
Eggs	Grade "A" Large White Eggs	1	1	Dozen
Cereal (Adult)	Breakfast Cereal	36	36	Ounces
Legumes	Peanut Butter 16 - 18 oz	1	2	Containers
Legumes	Beans/Peas (1)-16 oz Bag Dry or (4) 15-16 oz Cans	1	2	Containers
Bread/Whole Grains	Whole Wheat Bread or Whole Grains	16	16	Ounces
Fruit & Vegetables Cash Value	Fruit and Vegetables - Cash Value Voucher	\$11.00	\$11.00	\$\$\$
Juice - 48 oz	Juice 48 oz. or 11.5 - 12 oz. Concentrate	3	3	Containers
Milk Low Fat/fat free	Skim or 1% Milk	5.50	5.50	Gallons
X WIC Eligible Nutritionals	Boost RTF 8 oz.	904	904	Ounces

Increase or Add Formula After Issuance

Step 2: Support Staff completes the **Exchange/Increase Formula** screen.

- Complete the **Select the Formula Being Returned** Food Category and Food Subcategory even though the participant is not returning any cans of formula or FIs. In this scenario, “Formula Being Returned” refers to the formula being added.
- **Enter Returned FIs** remains blank (the participant is not returning FIs).
- Complete the **Select the Replacement Formula** container, which includes the: **Food Category** and **Food Subcategory** dropdowns. In this scenario, “Replacement Formula” refers to the formula being added.
- Cans Originally Issued, Total Returned Cans, RFO Newly Prescribed, Cans Newly Prescribed, Cans After Proration, Total Cans, and Total RFO auto-populates.
- **Total Replaced Cans** auto-populates with the number of cans to be issued.
- **Proration** will occur when the max quantity is prescribed.

Stone Family
Family ID: F04900006504
146 Quartz Drive
RURAL HALL, NC 27045

Sandy T. Stone
Participant ID: 954492234M
Age: 26 years and 1 month
WIC Category: Pregnant

Exchange or Increase Formula

Select the Formula Being Returned

Food Category: WIC Eligible Nutritionals
Food Subcategory: Boost RTF 8 oz.
Quantity: _____ Cans

Enter Returned Food Instrument(s)

Serial # [] [Add] [Clear]

Serial #	Subcategory	Quantity
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Total Items: 0

Cans Originally Issued: 0 Total Returned Cans: 0
RFO Newly Prescribed: 904.00 Cans Newly Prescribed: 113 Cans After Proration: 113
Total Cans: 113
Total RFO: 904.00

Select the Replacement Formula

Food Category: WIC Eligible Nutritionals
Food Subcategory: Boost RTF 8 oz.
Total Replaced Cans: 113

[Formula Wizard] [Save] [Cancel]

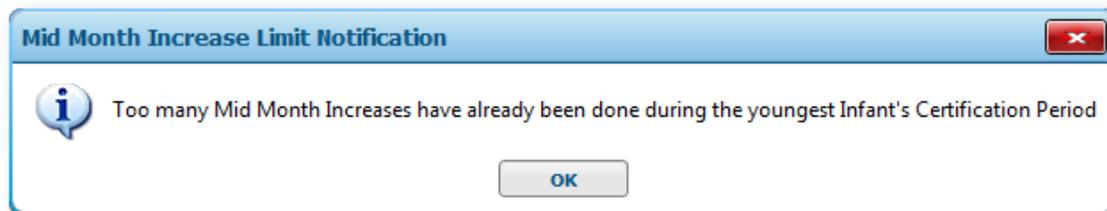
Increase or Add Formula After Issuance

Step 3: Once the Support Staff selects **Save**, the user is given the option to use the Formula Wizard if product is in inventory. If product is not in inventory, the FIs with the added WEN will automatically print. Support Staff obtains signature for new benefits.

Step 4: Support Staff returns to **Food Instrument List** and voids and reissues future months' benefits for entire family.

Additional Information Related to Exchange/Increase Formula:

1) There is a **limit of two dyad mismatches** between the infant and the mother per certification period. For example, a fully breastfeeding woman with redeemed food instruments for the current month comes into clinic to receive infant formula for the current month. The woman's Breastfeeding Status changes to Partially Breastfeeding \leq MMA at that time. Two months later, the same Partially Breastfeeding \leq MMA woman with redeemed food instruments for the current month comes into clinic to receive more infant formula for the current month. The woman's Breastfeeding Status changes to Partially Breastfeeding $>$ MMA at that time. This is the 2nd time within the certification period that there is a mismatched dyad. If the woman comes in a third time to get increased formula for her infant and there is a mismatched dyad, the system will not allow the user to issue the increase. The following message will appear:



NOTE: In this message, "youngest infant" refers to the infant(s) that are dyad-linked to mom.

2) For women and children, there is **no limit** to the number of times WIC Eligible Nutritionals (WEN) can be exchanged or increased, up to the category maximum.