

Providing Nutrition Education

The content of and method used to provide nutrition education must be relevant to the participant's age, nutritional needs, interests, household situation, cultural preferences, language spoken and any special considerations the participant might have such as being a migrant; being homeless; having vision, hearing or learning impairments; and/or having limited English proficiency. Nutrition education should be offered to all adult participants and to parents/guardians/caretakers of infant and child participants as well as child participants whenever possible. A proxy may receive nutrition education when appropriate for the participant's plan of care.

■ **Nutrition Education At Certification/Subsequent Certification**

When nutrition education is part of the nutrition assessment and certification process, the education must be provided directly to a participant/parent/guardian/caretaker on an individual basis by a competent professional authority (CPA). Refer to Chapter 6C for information on who qualifies to be a CPA.

■ **Follow-Up Nutrition Education**

A nutrition assessment helps to determine a participant's nutritional status and degree of nutritional risk and subsequently, the nutrition plan of care and the nature of the required follow-up nutrition education; specifically, "low risk" or "high risk". Refer to Chapter 6C for more information on nutrition assessments. There is required minimum frequency of nutrition education for certification periods for participants. Refer to Section 2 for more information.

- ▶ **Low-Risk Follow-Up.** Low-risk nutrition education generally focuses on anticipatory guidance such as complementary infant feeding practices, avoiding tobacco smoke exposure or the recommended schedule for immunization for young children. It can also focus on public health nutrition messages that promote lifelong positive dietary and physical activity habits such as eating more fruits and vegetables, choosing lower fat foods, increasing physical activity or limiting TV and screen time.

Low-risk follow-up nutrition education may be provided:

- by a CPA to any participant.
- by trained non-CPA staff (i.e., WIC management support staff) or by another approved method (see discussion later in this section) when a CPA determines it appropriate for:
 - a postpartum non-breastfeeding woman,
 - a non-breastfeeding infant on a contract standard milk- or soy-based infant formula, or
 - a child.

▶ **Methods For Providing Low-Risk Follow-up Nutrition Education**

Following are methods for providing low-risk, follow-up nutrition education. Staff who want to use educational methods other than those listed are encouraged to consult with their Regional Nutrition Consultant.

- **Individual Education.** Individual education is provided directly to an individual or family. There are a variety of ways that individual education can be provided. When possible, staff should provide education directly to child participants.
 - **With a Competent Professional Authority**
 - Face-to-face: Individual nutrition education by a CPA is usually done face-to-face at the local WIC agency.
 - Telephone/mobile device: A conversation via telephone or mobile device with a CPA can qualify as a nutrition education follow-up contact. The content must be documented in the participant’s record. Staff must ensure that follow-up nutrition education is offered and documented, including any materials or additional resources mailed or emailed as part of the nutrition education contact. Refer to Chapter 8, Sections 2 &3 for guidance on NC eWIC issuance.
 - **With Management Support/non-CPA Staff.** Staff, other than CPAs in the agency, who have been trained can provide face-to-face education on simple nutrition or physical activity-related information referred to as “mini lessons.” These are single objective, brief communications which are developed by a nutritionist. Each mini-lesson used in an agency must have a written outline which includes the target audience, one educational objective, an outline of the information to be communicated to the participant, and a copy of the educational handout to be given to the participant, if applicable. Mini lessons may not be provided via telephone.

Local agencies that use WIC management support or other non-CPA staff to provide mini-lessons must have a written local agency policy which includes:

- the specific staff, or groups of staff, that will be trained to provide nutrition education;
 - who will be responsible for training management support staff and other non-CPA staff;
 - how the training will be provided on an ongoing basis to assure staff maintain current knowledge of the nutrition subject(s);
 - how and where documentation of training will be maintained including the dates of the training, content of the training, names of staff participating in the training, and name and title of trainer;
 - how it is communicated which participants will receive a mini-lesson and when the mini-lesson is to be provided; and,
 - how it is documented that mini-lessons have been provided to participants. Refer to Section 4 for information on documentation of nutrition education contacts.
- **Online.** Online nutrition education provides independent learning opportunities for participants and allows them to complete follow-up nutrition education contacts at a time of their choosing on a computer or mobile device. This option should be offered to all low-risk participants.

wichealth.org. The Nutrition Services Branch subscribes to wichealth.org, an online nutrition education system. This system allows participants to complete web-based educational modules on a variety of relevant topics from which the participant can choose. If participants choose this method of education, they do not need to be physically present for issuance. Staff may issue benefits once the nutrition education contact has been confirmed and documented in the participant's record. Refer to Chapter 8 sections 2 & 3 for guidance on NC eWIC issuance.

If the local agency desires to have other online or electronic nutrition education resources, they must be approved by the Nutrition Services Branch (NSB) prior to purchase. Refer to Chapter 12 for more information on obtaining prior approval.

- **Group Education.** Agencies providing group education must have written class outlines on file. Each outline must include at a minimum: the target audience, objectives, content of the presentation, and any activities/materials used. An evaluation of classes is optional. These outlines should be reviewed periodically and updated as needed to assure they are relevant and accurate.

Staff may also choose to coordinate with other group education services in the agency such as, but not limited to, childbirth education, breastfeeding, or parenting classes. These classes may qualify as nutrition education contacts if they include a clear nutrition component, and a copy of the lesson plan or outline is on file.

- **Nutrition Education Provided Outside The Local Agency.** Follow-up nutrition education may be provided by individuals who work outside the local WIC agency. Staff who work in programs such as the Expanded Foods and Nutrition Education Program (EFNEP) and the Head Start Program and who are trained to provide general nutrition education may provide low-risk nutrition education through these programs to individuals who also participate in WIC. Refer to Section 4 for information on the communication and documentation of nutrition education provided by staff outside of the local agency.
- **High-Risk Follow-Up.** High-risk nutrition education generally is focused on education or counseling specific to a nutrition-related health/medical condition and is generally provided on an individual basis. A high-risk follow-up must be provided for:
 - all pregnant women,
 - all breastfeeding mother-infant dyads,
 - all infants receiving any formula other than the contract standard milk- or soy-based infant formula, and
 - any participant identified as high risk through the nutrition assessment.Participants who have already had the required number of nutrition education contacts with a CPA may choose to participate in any of the low-risk nutrition education activities when it is of interest to them.

► **Methods For Providing High-Risk Follow-up Nutrition Education**

Following are methods for providing high-risk, follow-up nutrition education.

■ **Individual Education at/by the Local Agency**

- Face-to-face: individual nutrition education by a CPA is usually done face-to-face at the local WIC agency.
- Telephone/mobile device: A conversation via telephone or mobile device with a CPA can qualify as a nutrition education follow-up contact. The content of the communication must be documented in the participant's Crossroads record. This method may be used due to participant hardship circumstances such as illness, confinement to bedrest, weather conditions or transportation limitations. Staff must ensure that follow-up nutrition education is offered and documented, including any materials or additional resources mailed or emailed as part of the nutrition education contact. Participants do not need to be physically present for issuance. Staff may issue benefits once the nutrition education contact has been confirmed and documented in the participant's record. Refer to Chapter 8 sections 2 & 3 for guidance on NC eWIC issuance.

■ **Nutrition Education Provided Outside The Local Agency.**

A nutritionist, registered dietitian, dietetic technician registered (DTR), registered nurse, nurse practitioner, physician assistant, or physician who works in a setting outside of the local WIC agency may provide specialized nutrition education and counseling to high-risk WIC participants. Typical settings apart from WIC where specialized nutrition education and counseling may occur include Children's Developmental Services Agencies (CDSAs), metabolic centers, hospital outpatient clinics, high-risk maternity clinics, and private physicians' offices.

■ **Participant Input**

To help assure that the agency's approach to nutrition education is relevant and meeting the needs and interests of participants, staff are encouraged to obtain input from WIC participants. Examples of areas for input include nutrition education topics, barriers to attending nutrition education sessions, preferred methods of nutrition education instruction, and/or effectiveness of breastfeeding promotion and support activities.

When gathering input, staff may establish a system just for WIC or coordinate their efforts with other programs in the agency. Participant input can be gathered in a variety of ways including surveys, focus groups, an advisory board comprised of participants, and/or an ongoing suggestion box located in the agency.

Documentation of Nutrition Education

All nutrition education provided to participants must be documented in the Crossroads system. A participant/parent/guardian/caretaker's refusal or inability to take part in educational activities also must be documented.

■ Nutrition Education Provided By Agency Staff

- **Initial Nutrition Education.** All initial education contacts must be documented by the CPA in the Crossroads system, as part of the participant's nutrition assessment and plan of care that is completed during certification. Documentation should include at a minimum:
 - The person(s) who received the nutrition education
 - Nutrition education topic(s)/content
 - Method of delivery
 - Date of contact and identification of individual providing the nutrition education which will be captured automatically during certification in the system.
- **Follow-Up Nutrition Education.** Follow-up nutrition education contacts provided to participants/parents/guardians/caretakers must be documented in the Crossroads system. Refer to Section 3 for more discussion of providing low-risk and high-risk nutrition education.
 - **Low-Risk Nutrition Education.** Documentation of follow-up, low-risk nutrition education must include at a minimum: person(s) who received the nutrition education, the nutrition education topic and the method of delivery. Low-risk nutrition education contacts, including the documentation of group education and mini-lessons must be documented on the Nutrition Education screen.
 - **High-Risk Nutrition Education.** Documentation of follow-up, high-risk nutrition education or counseling, which is individualized to the participant's health or medical condition must include the nutrition education topics and content of the nutrition education/counseling, and plans for follow-up. High-risk nutrition education contacts must be documented on the Care Plan Summary screen in the Nutrition Assessment text box for the individual participant to whom the nutrition education was provided.

■ Nutrition Education Provided By Staff Outside The Local Agency

When nutrition education and counseling provided outside the local WIC agency is counted toward required nutrition education for a participant, these services must be documented by the outside agency provider. A copy of the documentation of the services provided must be sent to the local WIC agency. This documentation should be scanned into the participant's Crossroads record and a note made on the Care Plan Summary screen in the Nutrition

Assessment text box for the individual participant to whom the nutrition education was provided. The note should state that the participant received the nutrition education/ counseling from the source outside the agency that provided it and refer to the scanned document.

- **Low-Risk Nutrition Education.** There should be a written agreement between the local WIC agency and any outside agency routinely providing nutrition education to WIC participants. The agreement must include arrangements for documenting and communicating information to the local WIC agency about the date, content or topic, and participant receipt of nutrition education.
 - **High-Risk Nutrition Education.** Health professionals outside of the local WIC agency who provide specialized nutrition education and counseling to high-risk WIC participants, should send written documentation of the service (including the date, content, and provider) to the local WIC agency for inclusion in the participant's health record as outlined above.
- **Non-Participation In Nutrition Education**
The inability or refusal of a participant to participate in nutrition education must be documented in the Crossroads system in the Nutrition Education Refusal section on the Nutrition Education screen. Individual participants shall NOT be denied supplemental foods for failure to attend or participate in nutrition education activities.

ALLOWABLE PROOFS FOR IDENTITY AND RESIDENCE**

| Integrity Document (must be original documents, not copies) | Proof of Identity (Must be in applicant's name) | Proof of Residence (Must include current physical address*) |
|--|--|--|
| Bill, account statement, or receipt less than 60 days old (e.g., bank, credit card, loan papers, mortgage/ rental, utility) | ✓ | ✓ |
| Birth Certificate | ✓ | ✓ |
| Blank Check | ✓ | ✓ |
| Check cashing, credit, or bank ATM card | ✓ | |
| Letterhead correspondence < 60 days old (with address and telephone number of source. (Note: postmarked forwarded mail and WIC generated correspondence is acceptable) | ✓ | ✓ (only if in applicant's name) |
| Food and Nutrition Services certification letter | ✓ | ✓ |
| Foster Child placement letter | ✓ | ✓ |
| Hospital crib card or discharge papers | ✓ | ✓ |
| Hospital ID Card or Bracelet | ✓ | ✓ |
| Immunization Record | (only for Infants & children) | ✓ |
| Income tax filing for the most recent tax year | ✓ | ✓ |
| Insurance Card or Insurance Policy | ✓ | ✓ |
| LES (military Leave and Earnings Statement) | ✓ | ✓ |
| Marriage License less than 60 days old | ✓ | ✓ |
| Medicaid or Medicaid Presumptive Eligibility (Must first verify current eligibility) | ✓ | ✓ |
| Mother's Verification of Facts (MVF) signed and dated' less than 12 months old | (only for infants) | ✓ |
| Paycheck stub or direct deposit notification <60 days old ** | ✓ | ✓ |
| Permanent Residence Card ("green card") | ✓ | ✓ |
| Photo ID (current): DMV, US governmental agency, US passport, military, school | ✓ | ✓ |
| Property tax statement | ✓ | ✓ |
| Social Security card | ✓ | |
| Unemployment letter/notice | ✓ | ✓ |
| Verification of certification (VOC) (for current certification period) | ✓ | |
| Voter registration card for NC | ✓ | ✓ |
| Work ID card | ✓ | ✓ |
| Only at Recertification | | |
| Visual Recognition | ✓ | |
| NC eWIC Card | ✓ | |

* When the applicant/participant only has items listing a post office box staff must document the physical address as well as the mailing address in the Crossroads system.

** May use image accessed from the internet and displayed on a smart phone if: a) applicant is observed accessing the image, and b) local agency staff can read the image and judges it to be authentic. Staff may decline to accept an electronic image and require original documentation (hard copies) if there is any question about the authenticity of the electronic image.

**MAXIMUM MONTHLY ALLOWANCES OF SUPPLEMENTAL FOODS
FOR FOOD PACKAGES I - VII**

■ **Food Package I, II, III**

▸ **Fully Breastfed Infants**

| 0 through 5 months (Food Package I) | |
|--|-----------------------------------|
| Foods | Maximum Monthly Allowances |
| None | |
| 6 through 11 months (Food Package II) | |
| Foods | |
| Infant cereal | 24 ounces |
| Infant fruits and vegetables | 256 ounces |
| Infant meats | 77.5 ounces |

▸ **Partially Breastfed Infants**

| 0 months (Food Package I & III) | |
|--|-----------------------------------|
| Foods | Maximum Monthly Allowances |
| Similac Advance Powder | 1 Can |
| 1 through 3 months (Food Package I & III) | |
| Foods | |
| Similac Advance Powder | 5 Cans |
| 4 through 5 months (Food Package I & III) | |
| Foods | |
| Similac Advance Powder | 5 Cans |
| 6 through 11 months (Food Package II & III) | |
| Foods | |
| Similac Advance Powder | 4 Cans |
| Infant cereal | 24 ounces |
| Infant fruits and vegetables | 128 ounces |

▸ **Fully Formula Fed Infants**

| 0 through 3 months (Food Package I & III) | |
|--|-----------------------------------|
| Foods | Maximum Monthly Allowances |
| Similac Advance Powder | 9 Cans |
| 4 through 5 months (Food Package I & III) | |
| Foods | |
| Similac Advance Powder | 10 Cans |
| 6 through 11 months (Food Package II & III) | |
| Foods | |
| Similac Advance Powder | 7 Cans |
| Infant cereal | 24 ounces |
| Infant fruits and vegetables | 128 ounces |

**MAXIMUM MONTHLY ALLOWANCES OF SUPPLEMENTAL FOODS
FOR FOOD PACKAGES I - VII**

■ **Food Package IV**

▸ **Children**

| 1 through 4 years | |
|---|---|
| Foods | Maximum Monthly Allowances |
| Juice | 128 fluid ounces |
| Milk | 4 gallons |
| Breakfast cereal | 36 ounces |
| Eggs | 1 dozen |
| Fruits and vegetables | \$8.00 in cash value vouchers |
| Whole wheat bread or whole grains | 32 ounces |
| Dry or canned beans, peas or lentils OR peanut butter | 1 container beans/peas:16-ounce bag dry or (4) 15-16-ounce cans or peanut butter 16-18 ounces |

■ **Food Package V**

- **Pregnant women**
- **Pregnant women who are fully formula feeding an infant**
- **Pregnant women who are breastfeeding (single or multiple infants) > MMA**
- **Partially breastfeeding women ≤ MMA**

| Up to 1 year postpartum | |
|--------------------------------------|--|
| Foods | Maximum Monthly Allowances |
| Juice | 144 fluid ounces |
| Milk | 5.5 gallons |
| Breakfast cereal | 36 ounces |
| Eggs | 1 dozen |
| Fruits and vegetables | \$11.00 in cash value vouchers |
| Whole wheat bread or whole grains | 16 ounces |
| Peanut butter | (1) 16-18-ounce container |
| Dry or canned beans, peas or lentils | 1 container beans/peas:16-ounce bag dry or (4) 15-16-ounce cans |

MAXIMUM MONTHLY ALLOWANCES OF SUPPLEMENTAL FOODS FOR FOOD PACKAGES I - VII

■ Food Package VI

- ▶ Non-breastfeeding postpartum women
- ▶ Partially breastfeeding women (single or multiple infants) >MMA

| Up to 6 months post-partum | |
|---|---|
| Foods | Maximum Monthly Allowances |
| Juice | 96 fluid ounces |
| Milk | 4 gallons |
| Breakfast cereal | 36 ounces |
| Eggs | 1 dozen |
| Fruits and vegetables | \$11.00 in cash value vouchers |
| Dry or canned beans, peas or lentils or peanut butter | 1 container beans/peas:16-ounce bag dry or (4) 15-16-ounce cans or peanut butter 16-18 ounces |

■ Food Package VII

- ▶ Fully breastfeeding women whose infant does not receive formula from WIC
- ▶ Partially breastfeeding multiple infants (from the same pregnancy) who receive formula amounts \leq MMA;
- ▶ Pregnant and fully breastfeeding;
- ▶ Pregnant and partially breastfeeding \leq MMA
- ▶ Pregnant with multiples AND fully breastfeeding, or partially breastfeeding \leq MMA or $>$ MMA, or fully formula feeding

| Up to 1 year postpartum | |
|--------------------------------------|--|
| Foods | Maximum Monthly Allowances |
| Juice | 144 fluid ounces |
| Milk | 6 gallons |
| Breakfast cereal | 36 ounces |
| Cheese | 1 pound |
| Eggs | 2 dozen |
| Fruits and vegetables | \$11.00 in cash value vouchers |
| Whole wheat bread or whole grains | 16 ounces |
| Fish | 30 ounces |
| Peanut butter | (1) 16-18-ounce container |
| Dry or canned beans, peas or lentils | 1 container beans/peas:16-ounce bag dry or (4) 15-16-ounce cans |

**MAXIMUM MONTHLY ALLOWANCES OF SUPPLEMENTAL FOODS
FOR FOOD PACKAGES I - VII**

■ **Food Package VII x 1.5**

▸ **Fully breastfeeding multiple infants who do not receive formula from WIC**

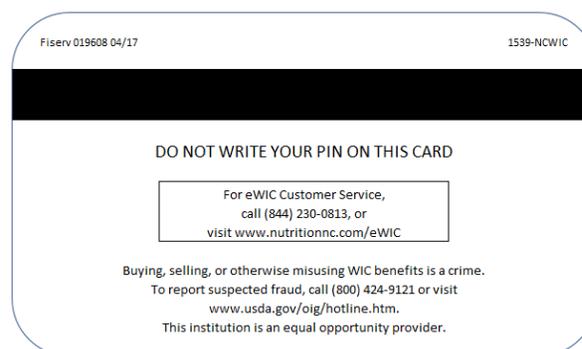
| Up to 1 year post-partum | |
|--------------------------------------|---|
| Foods | Maximum Monthly Allowances |
| Juice | 216 fluid ounces |
| Milk | 9 gallons |
| Breakfast cereal | 54 ounces |
| Cheese | 1.5 pounds |
| Eggs | 3 dozen |
| Fruits and vegetables | \$16.50 in cash value vouchers |
| Whole wheat bread or whole grains | 24 ounces |
| Fish | 45 ounces |
| Peanut Butter | (1.5) 16-18-ounce container |
| Dry or canned beans, peas or lentils | 1.5 container beans/peas: 16-ounce bag dry or (4) 15-16-ounce cans |

Electronic Benefit Transfer and NC eWIC

Electronic Benefit Transfer (EBT) is a food benefit delivery system that permits electronic access to WIC food benefits using a plastic card with a magnetic stripe. In North Carolina, the WIC EBT system is called eWIC. Each eWIC card has a 16-digit Primary Account Number (PAN) that is linked to the family's Electronic Benefit Account (EBA). The card becomes active when food benefits are issued to the EBA. The card can be used to purchase food benefits after the cardholder self-selects a four-digit Personal Identification Number (PIN). The PIN is a numeric password used to authenticate the individual to the eWIC system. The PIN acts as an electronic signature at the point of purchase.

Local agency staff initiate the EBT process through the Crossroads Management Information System (MIS). Each family is assigned a PAN and an eWIC card is issued. Aggregated food benefits for the family are issued to the PAN and the food benefits are purchased by the cardholder at WIC-authorized vendors and pharmacies. All food benefits, including supplemental foods prescribed to each participant, infant formulas and WIC-eligible nutritionals (WEN), and/or a fixed-dollar amount to purchase fruits and vegetables (Cash Value Benefit or CVB) are listed on a family shopping list called Shopping List Remaining Benefits. Only the prescribed foods, formula and WEN on the Shopping List may be purchased using the eWIC card.

Sample NC eWIC Card



(Blank page)

Food Benefit Issuance

Local agency staff must complete the following activities when food benefits are issued. Procedures may vary as noted in the content of this section. The activities in this section assume required nutrition education contacts have been completed. Refer to Chapter 5: Nutrition Education.

■ Proof of Identity

- **Issuance of NC eWIC Card:** The individual who receives a NC eWIC card (initially or as a replacement) must be the WIC participant, parent/guardian 1, parent/guardian 2 or caretaker. Refer to Chapter 6A on representatives for infants and children. Before issuing a NC eWIC card, local agency staff must view proof of identity of the individual. If the individual cannot verify their identity then NC eWIC card issuance cannot occur. Selecting the radio button corresponding to the individual's name on the Issue EBT Card screen in Crossroads indicates that staff has viewed the proof of identity. Refer to Chapter 6A, Attachment 1 for acceptable proofs of identity.
- **Food Benefit Issuance:** Before issuing food benefits, local agency staff must view proof of identity of the individual. If a participant/parent/guardian/caretaker/proxy cannot verify their identity then food benefit issuance cannot occur. Refer to Chapter 6A, Attachment 1 for acceptable proofs of identity.

■ Issuance Frequency

In most situations, food benefits are issued for three months. Local agency staff may assign a different issuance frequency in the Crossroads system when needed. Refer to Chapter 8, Section 3 for additional information.

■ Documentation of Issuance

The Crossroads system automatically documents issuance in the participant's record.

■ Obtain a Signature

At each food benefit issuance, local agency staff must obtain the signature of the participant/parent/guardian/caretaker/proxy by signing the electronic signature pad. The individual's signature indicates that staff has viewed the individual's proof of identity.

▸ Failure to obtain a Signature

- If staff fails to obtain the signature of the individual, staff must select their own name on the Print Food Instruments and Sign box in the Crossroads system, sign their own name, and write "forgot to sign." An entry should be made in the participant's record in Crossroads as to why staff is signing for the food benefit issuance.
- If the individual cannot write his/her name, instruct the individual to make his/her "mark" on the electronic signature pad. If the individual does not have a usual "mark" staff must have the individual make an "X." Staff then must print the person's name on the signature pad, initial and date this entry.

■ **Offer the Option of Naming a Parent/Guardian 2 and/or Caretaker**

Staff should explain the role of the parent/guardian 2 and caretaker as being able to perform all the functions of the parent/guardian 1 as the representative for an infant or child. Naming a second or third representative provides convenience to the parent/guardian 1 by allowing them to bring the infant/child to mid-certification and subsequent certification appointments, as well as signing for food benefits. Refer to Chapter 6A, on representatives for infants and children.

■ **Explain How to Select a Personal Identification Number (PIN)**

To use the NC eWIC card, a PIN must be assigned. Staff should provide instructions on PIN self-selection. Only the participant/parent/guardian/caretaker can select the PIN.

■ **Review Food Benefits and Print the Shopping List.**

At initial issuance, staff must explain to the participant/parent/guardian/caretaker that supplemental foods issued are provided for each eligible participant and aggregated (combined) into family based benefits. Review the aggregated food benefits on the Food Instrument List screen with the participant/parent/guardian/caretaker/proxy and print the Shopping List Remaining Benefits prior to issuing food benefits.

■ **Issue Electronic Food Benefits**

Local agency staff issue food benefits to the participant from the Issue Food Instruments screen in Crossroads. The food benefits are issued to the participant's Electronic Benefits Account (EBA) and the eWIC card is used to access those benefits at authorized vendors or pharmacies.

■ **Food Benefit Issuance to a Proxy**

The participant/parent/guardian/caretaker must be offered the option of appointing up to two proxies. A proxy is any individual appointed by a participant/parent/guardian or caretaker of an infant or child. A proxy must be 18 years of age and is only authorized to pick up food benefits and use the NC eWIC card on behalf of the family. A proxy is not authorized to act as the parent/guardian/caretaker of an infant or child at certification or mid-certification assessments. A proxy must read or have read to them in their language of preference, the statements of rights and responsibilities under the WIC Program. Refer to Chapter 6D, Section 1, on rights and responsibilities. A proxy who has not been previously appointed must have a dated note signed by the participant/parent/guardian/caretaker giving him/her the authority to receive food benefit issuance for the participant-

When a local agency staff person who is authorized to provide food benefit issuance also serves as a proxy, then issuance must be performed by a different staff person.

A proxy is limited to signing for one month's food benefit issuance when a pregnant woman is within two weeks of her expected delivery date (EDD).

■ **Explain How to Use the NC eWIC Card**

Local agency staff must provide written information on using electronic food benefits.

■ **Explain How to Select WIC Approved Foods**

At initial certification, staff must instruct the participant/parent/guardian/caretaker on how to select the food items specified on the “Shopping List Remaining Benefits.” Staff should provide the brochure “North Carolina WIC Program Shopping Guide.” Staff must also explain the use of the Cash Value Benefit. If the cost of the approved fruits and vegetables exceeds the maximum amount, the participant/parent/guardian/caretaker may pay the difference or return item(s). Payment can be made using any form the vendor accepts, including Food and Nutrition Services EBT cards. No tax can be charged on payments made with an EBT card. Tax will be charged on payments made by cash, debit or credit card.

At any subsequent issuance, staff should ask if a review of how to select WIC approved foods is needed or if there are any questions on how to select or about the WIC approved foods.

■ **Explain How to Use the App**

Staff should provide instructions on Solutran’s eWIC phone app, “Bnft.”

■ **Explain How to Use Coupons, “Valued Customer” Cards, and “In-Store Specials”**

Staff must instruct the participant/parent/guardian/caretaker/proxy that they are entitled to use coupons (i.e. manufacturer or store coupons), “valued customer” cards, and “in-store” specials for WIC approved foods just as they would use them with any other purchases. The participant/parent/guardian/caretaker/proxy is not responsible for paying tax on the value of the coupon or “in-store special.”

At any subsequent issuance, staff should ask if a review is necessary or if there are any questions pertaining to the use of coupons, valued customer cards or in-store specials.

■ **Provide Information on NC eWIC Card Replacement**

Staff must explain the policy on replacement of the NC eWIC card. The eWIC card can be replaced in person by the participant/parent/guardian/caretaker at the local clinic. Replacement cards may not be issued to proxies. The eWIC card can also be replaced by mail if the cardholder calls the eWIC Customer Service system (also known as the Interactive Voice Response (IVR) system). Mailed cards may take up to 7 days to be received. Local clinic staff may not mail replacement cards.

The eWIC card may be replaced if destroyed, damaged, stolen or lost. Examples include but are not limited to: fire, flood, repossessed or totaled car, housing eviction, domestic violence. The reason (self-reported or verified by a third party) must be documented in the Crossroads system.

Replacing the NC eWIC card does not change the amount of food benefits not already redeemed in the family EBA. The PIN for the card remains the same as the previous card. Any current food benefits reported as missing or stolen from an eWIC card cannot be reissued.

An eWIC card may be replaced as many times as needed. Families who need their card replaced more than three times should be encouraged but are not required to use the eWIC

Customer Service system for a mailed replacement. Local staff can use the Issue EBT Card screen to view reasons for multiple (excessive) replacements and discuss ways to reduce card replacement with the cardholder as needed.

Note: In a major natural disaster affecting an entire community, WIC is not considered the first-line of defense to respond to the nutritional needs of mass disaster victims when emergency services such as the Red Cross are available. In times of natural disasters such as a hurricane, the State WIC Program will provide guidance on handling replacement of destroyed NC eWIC cards.

■ **Provide a List of Authorized WIC Vendors and Pharmacies**

At NC eWIC card issuance, staff must provide a list of currently authorized NC eWIC vendors and pharmacies in their service area to the participant/parent/guardian/caretaker/proxy. Staff should provide an updated list of authorized vendors and pharmacies as needed.

■ **Exchange of WIC Food Benefits**

At all issuances, staff must instruct the participant/parent/guardian/caretaker/proxy that exchanging the NC eWIC card, WIC foods and/or formula, for cash, credit, non-food items, or non-WIC food, is a violation subject to federal and state sanctions. Refer to Chapter 6F for further guidance on program abuse by participants.

■ **Provide Appropriate Notice**

At any issuance, staff must provide the appropriate notice to all applicable family members. Refer to Chapter 6D, Section 2.

■ **Determine the Next Appointment**

Staff should determine the next appointment type and either schedule a day and time or instruct the participant/parent/guardian/caretaker/proxy when to return. For subsequent food benefit issuance, the participant/parent/guardian/caretaker/proxy should return no earlier than seven days prior to the family issuance day or no later than ten days after the family issuance day to allow for full benefit issuance.

Food Benefit Issuance Variances

There are a variety of situations where food benefit issuance may vary from the issuance described in Section 2. These may include but are not limited to: monthly issuance, prescription changes, primary caretaker changes and circumstances that prevent or do not require physical presence.

■ **Monthly Issuance**

There are times when monthly issuance is either required or preferred.

- **Required Monthly Issuance.** Situations when staff must keep a family on monthly issuance include:
 - A pregnant woman within two weeks of her expected date of delivery (EDD)
 - A participant/parent/guardian/caretaker who informs the local agency staff that he/she is moving out-of-state within one month. Staff also should issue a Verification of Certification (VOC) sheet and remind the participant/parent/guardian/caretaker that the NC eWIC card cannot be used outside of NC. (See Chapter 6E for information on Transfer of Certification.)
- **Preferred Monthly Issuance.** Staff and/or a participant/parent/guardian/caretaker may request monthly or bi-monthly issuance.

■ **Type of infant formula or WIC-eligible nutritional (WEN) changes**

Food benefits may be replaced when the type of infant formula or WEN changes on the participant's food prescription. Once staff receives appropriate medical documentation (if required) for the new formula and/or WIC-eligible nutritional, the new product should be provided to the participant as soon as possible. The food benefits should be adjusted on the Prescribe Food screen and using the Exchange/Increase Formula feature in Crossroads.

■ **Incorrect food package was issued**

Food benefits may be reissued if an incorrect food package was prescribed and issued.

■ **Amount of formula changes**

If formula or WEN amounts are added or increased, the CPA must make the appropriate prescription changes in Crossroads. Staff should reissue new food packages to both the woman (if additional food benefits are prescribed) and her infant(s).

■ **Food subcategory change**

In the current month, replacement can occur when a food item subcategory changes. The CPA must enter a new food prescription prior to staff replacing the food package. Examples include: milk changed to lactose-reduced, legumes changed from peanut butter to beans/peas.

■ **Proration of benefits**

The Crossroads system automatically prorates a participant's food package according to the following principles:

- The cash value benefit is not prorated. The maximum value is always issued each month.

- Some types of foods cannot be partially provided. Bread, rice, tortillas, pasta, eggs, cheese, and yogurt will be provided in full.
- The remaining food package is prorated as follows:

| Number of Days remaining to the last date to spend (inclusive) | Food Package Size |
|--|-------------------|
| 11 – 19 | 2/3 Package |
| 1 – 10 | 1/3 Package |

Proration rules apply to any situation when the family issuance day is fixed and the provision of a full food package is not indicated. Examples: a participant receives food benefit issuance with fewer than 19 days before the last date to spend or a newborn is added to the program and given the same family issuance day as the rest of the family and there are 9 days remaining to the last date to spend. The family issuance date should never be changed to avoid proration. A family issuance date may be changed before issuance occurs if a family re-enrolls after more than three months off the program and has no unexpired food benefits.

■ **Primary Caretaker of Infant or Child Changes**

Each situation should be evaluated individually when the primary caretaker of an infant/child has changed due to abandonment, incarceration, death, a legal change of custody, or a change in foster care and that infant/child's food benefits cannot be retrieved from the person to whom they were issued.

Staff must document the change of primary caretaker, after verifying through written documentation or verbal confirmation from an agency such as the police or sheriff's department, or the Department of Social Services; or by a legal document or a public record such as a newspaper; or by self-report from the new primary caretaker.

Staff should try to retrieve any redeemed infant formula and/or WEN. If the infant or child is in the custody of the Department of Social Services, staff should ask the appropriate social worker for assistance. If the food benefits are not retrievable, staff should deactivate the previous card and issue a new NC eWIC card to the new primary caretaker and replace any unredeemed food benefits. Staff must document the situation for replacement in the participants record in Crossroads. When an infant requires an exempt formula or a child requires a WEN, staff should order these products from NSB.

■ **Issuing in the Last Month of Certification or Categorical Eligibility**

The Crossroads system issues to a participant in the last month of his/her certification period when the family issuance day is prior to the end of the certification period. Crossroads determines whether issuance can occur and how much to issue. If a subsequent certification is not completed, further issuance is not allowed.

The Crossroads system issues to a participant in his/her last month of categorical eligibility when the family issuance day is prior to the date of the end of the categorical eligibility. Further issuance is not allowed.

■ **Issuing When the Certification Period is Extended**

Issuance of one month of food benefits is allowed if an infant or child's certification period is extended. The Crossroads system will issue one month of food benefits beginning with the family issuance day. No further issuance is permitted. Refer to Chapter 6A, Section 8, Certification Periods.

■ **Issuance When the Cardholder is Not Physically Present**

Local agencies may provide food benefits to cardholders when they are not physically present for the reasons defined in this section. Procedures may vary as noted in the content of this section. The activities in this section assume required nutrition education contacts have been completed and other appropriate issuance activities as described in Section 2 (for example, provision of required notices) have been completed. Staff must ask the individual who is requesting issuance to state their name, date of birth and address including zip code. If the individual cannot provide the information requested, issuance may not occur and the individual must present in person with a valid proof of ID. During issuance, staff must select their own name on the Print Food Instruments and Sign box in the Crossroads system and sign their own name. Selecting the radio button corresponding to the staff's name on the Print Food Instruments and Sign box in Crossroads indicates that staff has confirmed the proof of identity. Staff must document the reason for the issuance without physical presence in the participant's Crossroads record.

▸ **Participant hardship**

Examples may include but are not limited to:

- Participant/parent/guardian/caretaker illness, quarantine, communicable disease, immune disorder
- Participant confinement to bed rest for pregnancy complications
- Inclement weather conditions
- Transportation limitations

▸ **Coordination with other services**

If nutrition education is being provided to a participant by other providers or programs (examples include but are not limited to: EFNEP, WICHealth.org), staff may issue food benefits. Nutrition education must be verified and documented in the participant's record before issuance can occur. Refer to Chapter 5 for guidance on nutrition education provision and documentation.

▸ **Local agency is experiencing a time limited hardship**

Examples of a time limited hardship would include but are not limited to agency flooding/structural damage, agency is moving or undergoing significant construction, or a disease outbreak. Prior to issuance, staff must inform their Regional Nutrition Consultant. The local agency must:

- Describe the reason for issuance
- State the projected period
- Outline plans to ensure nutrition education requirements are met (for both low risk and high-risk participants)
- Describe how participants will be notified of when their food benefits have been issued

▸ **Food Package Changes**

Food package changes that do not require medical documentation or nutrition assessment (for example, food subcategory changes) may be completed without the cardholder's physical presence. Formula exchange or increases must be assessed on a case-by-case basis (for example, whether products must be returned or medical documentation required and documented).

■ **Exchange of WIC Food Benefits**

At all issuances, staff must remind the participant/parent/guardian/caretaker/proxy that exchanging the NC eWIC card, WIC foods and/or formula, for cash, credit, non-food items, or non-WIC food, is a violation subject to federal and state sanctions. Refer to Chapter 6F for further guidance on program abuse by participants.

■ **Issuing during Fair Hearings**

Refer to Chapter 14 Administrative Appeals for guidance on food benefits issuance when an applicant/participant/parent/guardian/caretaker has requested a fair hearing.

eWIC Card Orders, Storage And Security

To maintain security and accountability of NC eWIC cards, local agencies must follow procedures for storage and security of eWIC cards.

■ Initial eWIC Card Order

The Nutrition Services Branch (NSB) will initiate and coordinate eWIC card orders for each local WIC agency. Initial card order and replenishment threshold amounts will be determined by NSB. The number of initial cards ordered is determined by the number of WIC families each agency supports, with additional amounts ordered to cover up to three (3) months of new WIC families and card replacements.

■ Card Shipment and Verification of Receipt

eWIC cards will be shipped directly from the vendor to the local WIC agency main site physical address. Cards will not be shipped to satellite sites. When the eWIC card order is shipped, the NSB Customer Service Desk will alert the local WIC agency with an email to the agency contact. The email will provide the number of boxes ordered, and shipping address for the delivery. NSB Customer Service Desk will follow up with a second email to request confirmation of receipt of the eWIC cards.

When the local agency receives a shipment of eWIC cards, send card receipt verification to the NSB Customer Service Desk by either capturing a snapshot of the label affixed to each box and signing it, or by signing the Card Order Manifest. Card receipt verification of the label or manifest must be emailed to NSB.CustomerService@dhhs.nc.gov or sent by fax to (919) 870-4863.

■ eWIC Card Storage and Security

eWIC Cards should be stored in a secure locked location (cabinet, closet or desk drawer) inaccessible to anyone other than WIC staff.

■ Additional eWIC Card Information

- ▶ The magnetic stripe on the card contains the 16-digit card number
- ▶ There is no participant data on the card itself
- ▶ Until the card is issued, it is not usable
- ▶ Even when the card is issued, all data resides within the eWIC processing system, rather than on the card

Reports and/or quarterly inventory sheets related to WIC check stock and/or eWIC Cards must be retained in accordance with DHHS Office of the Controller found (see: <http://www.ncdhhs.gov/control/>). Refer to Chapter 13 Records Retention and Disposition Schedule.

(Blank Page)