

Exchange Formula After Redemption: eWIC

After Food Benefits have been issued and one or more food items have been **redeemed**, infant formula, exempt infant formula or WIC Eligible Nutritionals (WEN) may need to be changed.

Examples include:

- Contract formula → a different contract formula or exempt infant formula
- Exempt infant formula → a different exempt formula or a contract formula
- WEN → a different WEN

The **Exchange/Increase Formula** quick link and screen will allow the user to return and exchange formula for the current month on an ounce per ounce basis. **This feature will not be available on the same day the original food prescription is created, but can be used on the next day.**

For a one-page summary, please refer to “Exchange Formula (or WEN) After Redemption – Quick Reference Guide: eWIC.”

Please refer to “Modifying Food Packages” for information on how to:

- Modify the Category, Subcategory or Quantity of Infant Formula
- Add WEN, Contract Infant Formula or Exempt Infant Formula to a participant’s food package

The **example** in this guidance has the following features:

- Exchange of a contract infant formula for an exempt infant formula
- Reconciliation of a Validation Summary screen on the Prescribe Food Screen
- Voiding and reissuance of food benefits for future months

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1. CPA navigates to the **Prescribe Food** screen of the **infant, woman or child** and updates the **Food Prescription Date** by selecting the green plus sign next to the Food Prescription Date. The CPA selects the New Food Prescription Date and selects **Save**.

The screenshot shows the 'Prescribe Food' interface for the Clay Family. The 'Food Prescription Date' is 6/20/2017. The 'Food Prescription Items' table lists 'ABC milk-based powder 14 oz' with a quantity of 806. The 'Add Item to Food Prescription' section is visible below. A summary table for 'Infant Formula' shows the following data:

Month	Jun	Jul	Aug	Total
ABC std pwrdr	806	806	806	2438 / 90
# Cans	9	9	9	27

The dialog box titled 'Select the New Food Prescription Date' shows a date field with '6/22/2017' entered. The field is highlighted with a red box. There are 'Save' and 'Cancel' buttons at the bottom.

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2. CPA uses the **Add Item to Food Prescription** container to select the **Category**, **Subcategory** and **Quantity** of the prescribed formula and selects the **Add Item** button. CPA completes the **Medical Documentation** screen (not shown), scans the WIC Program Medical Documentation form and selects **Save**. CPA saves the **Prescribe Food** screen.

The screenshot displays the 'Prescribe Food' interface for the 'Clay Family'. The 'Add Item to Food Prescription' form is highlighted with a red box. The form contains the following fields:

- Category:** Exempt Infant Formula
- Subcategory:** Nutramigen Concentrate 13 oz.
- Quantity:** 806
- Max / Med Max:** 806 / 806
- UOM:** Ounces
- Buttons:** Add Item, Clear

Below the form is a table titled 'Infant Formula' showing monthly usage:

Month	Jun	Jul	Aug	Total
ABC std pwrdr	806	806	806	2418 / 90
# Cans	9	9	9	27

At the bottom of the interface, there are buttons for 'Alternate Funding', 'Medical Documentation', 'Save', and 'Cancel'. The status bar at the very bottom shows 'Online Version 1.15.0.0 10026', '001-01 - Alamance - Burlington', and 'TAB 100%'.

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3. A **Validation Summary** pop-up displays indicating the category maximum is exceeded for Infant Formula. The **CPA** selects each future date/age range in the food prescription carousel, validates that the correct formula name and quantity is populated, and that the old formula is deleted. After all prescriptions are updated, the pop-up will disappear. Select the **Save** button to continue.

Clay Family
 Family ID: F00100006513
 1456 California Way
 ALAMANCE, NC 27201

Colin Clay
 Participant ID: 954558516L
 Age: 1 month
 WIC Category: Infant

Food Prescription

Food Prescription Date: 6/22/2017
 WIC Category: Infant
 Age Category: 1 to 3 Months
 Breastfeeding Status: Fully Formula Fed
 Family Issuance Day: 20
 Issuance Frequency: 3 Month(s)

Food Prescription Items

Category	Subcategory	Quantity	Category Max Quantity	UOM
Infant Formula (IF)	ABC milk-based powder 14 oz	806	806	Ounces
Exempt Infant Formula	Nutramigen Concentrate 13 oz.	806	806	Ounces

Validation Summary: 2

- Category maximum exceeded for Infant Formula (IF) for prescription with date 6/22/2017 12:00:00 AM
- Category maximum exceeded for Infant Formula (IF) for prescription with date 9/2/2017 12:00:00 AM

Infant Formula

Month	Jun	Jul	Aug	Total
ABC std pwrdr Quantity # Cans	806	806	806	2418 / 90
Nutramigen Concentrate 13 oz. Quantity # Cans	31	31	31	2418 / 26

Save

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4. **Support Staff** navigates to **Exchange/Increase Formula** quick link.

On the Exchange/Increase Formula screen, support staff:

- a) Enters the number of physical cans of formula/WEN returned by the participant in the 'Select the Formula Being Returned' **Quantity** field. Leaves blank if no physical cans are returned.
- b) Enters the number of cans of formula/WEN from the **Current Month EBT Benefit Balance** container in the 'Select the Formula Being Returned' **Quantity from EBT Account** field. Leaves blank if the Current Month EBT Benefit Balance equals zero.
- c) Selects the Replacement Formula Food Category and Food Subcategory.
- d) Once Save is selected, the user is given the option to use the Formula Wizard if the product is in inventory. If the product is not in inventory, food benefits with the new formula or WEN will automatically be added to the family's Electronic Benefits Account. The current month's benefits for additional family members are not affected.

NOTES:

- The total returned cans entered cannot be more than the amount originally issued.
- Formula is replaced on an ounce for ounce basis.
- If the family returns more cans of WIC-purchased formula than was issued in the current month, add these cans to inventory manually.

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This screenshot displays Current Month EBT Benefit Balance, cans of formula being returned from the EBT Account, Replacement Formula selected, Cans Originally Issued, Total Returned Cans, RFO Newly Prescribed, Cans Newly Prescribed, Cans After Proration, Total Cans, Total RFO and Total Replaced Cans.

Clay Family
 Family ID: F00100006513
 1456 California Way
 ALAMANCE, NC 27201

Colin Clay
 Participant ID: 954558516
 Age: 1 month
 WIC Category: Infant

Exchange or Increase Formula

Select the Formula Being Returned

Food Category: Infant Formula (IF) | Food Subcategory: ABC milk-based powder 14 oz | Quantity: 9 Cans | **Quantity from EBT Account: 9 Cans**

Enter Returned Food Instrument(s)

Serial #	Subcategory	Quantity
Total Items: 0		

Current Month EBT Benefit Balance

Food Category	Subcategory	Quantity	Unit
Infant Formula (IF)	ABC milk-based powder 14 oz	9	Cans

Total Items: 1

Summary:
 Cans Originally Issued: 9 | Total Returned Cans: 9
 RFO Newly Prescribed: 0.00 | Cans Newly Prescribed: 0 | Cans After Proration: 0
 Maximum Prescribed RFO: 806 | Total RFO: 806

Select the Replacement Formula

Food Category: Exempt Infant Formula | Food Subcategory: Nutramigen Concentrate 13 oz | Total Replaced Cans: 31

Formula Wizard | Save | Cancel

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- 5. **Support Staff** returns to **Food Instrument List** and reorganizes benefits in ascending order by selecting the column header **First Date to Spend**.

Before benefits are reorganized:

The screenshot shows the 'Food Instrument List' for the 'Clay Family'. The search criteria are set to 'From Date' 2/1/2017 and 'To Date' 6/22/2017. The table below lists the food instruments:

Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date	Print Date	Voided Date	Void Reason
100038811	6/20/2017	7/19/2017	Issued	6/20/2017			
100038812	7/20/2017	8/19/2017	Issued	6/20/2017			
100038813	8/20/2017	9/19/2017	Issued	6/20/2017			
100038819	6/22/2017	7/19/2017	Issued	6/22/2017			

In this example, newly issued food benefits display at the bottom of the Food Instruments list.

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After benefits are reorganized:

The screenshot displays the 'Food Instrument List' for the 'Clay Family'. The interface includes a navigation menu on the left, a search criteria section, and a table of food instruments. The table is titled 'Family Food Instruments' and shows the following data:

Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date	Print Date	Voided Date	Void Reason
100038811	6/20/2017	7/19/2017	Issued	6/20/2017			
100038819	6/22/2017	7/19/2017	Issued	6/22/2017			
100038812	7/20/2017	8/19/2017	Issued	6/20/2017			
100038813	8/20/2017	9/19/2017	Issued	6/20/2017			

A text box on the right side of the table contains the following text: 'Current month's benefits reorganized and displayed at the top.'

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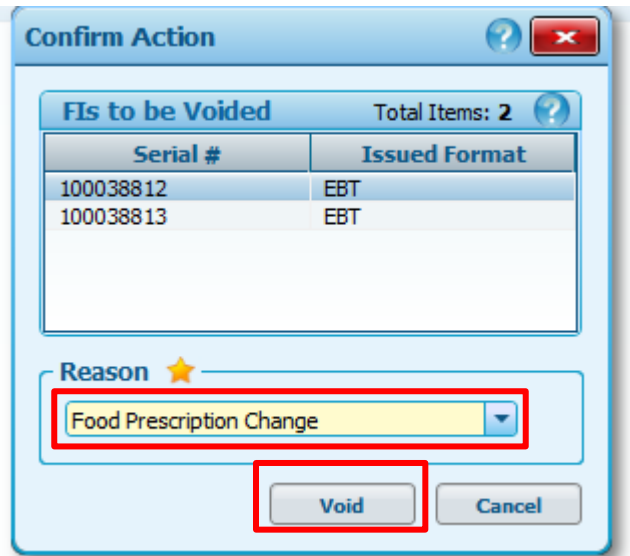
6. **Support Staff** selects the check box next to each future month's benefits for the entire family and selects the **Void Selected** button.

The screenshot displays the 'Food Instrument List' for the 'Clay Family'. The interface includes a navigation menu on the left, a search criteria section, and a table of food instruments. The table has columns for Serial #, First Date to Spend, Last Date to Spend, Status, Issue Date, Print Date, Voided Date, and Void Reason. Four instruments are listed, all with a status of 'Issued'. The checkboxes for the last two instruments (Serial # 100038812 and 100038813) are checked. At the bottom right, the 'Void Selected' button is highlighted with a red box.

	Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date	Print Date	Voided Date	Void Reason
<input type="checkbox"/>	100038811	6/20/2017	7/19/2017	Issued	6/20/2017			
<input type="checkbox"/>	100038819	6/22/2017	7/19/2017	Issued	6/22/2017			
<input checked="" type="checkbox"/>	100038812	7/20/2017	8/19/2017	Issued	6/20/2017			
<input checked="" type="checkbox"/>	100038813	8/20/2017	9/19/2017	Issued	6/20/2017			

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7. A **Confirm Action** popup displays with the FIs to be Voided and the Issued Format. In this scenario, FIs to be Voided refers to Food Instrument Numbers corresponding to future EBT benefits. Select the void reason **Food Prescription Change** and then select the **Void** button. The FI Status on the Food Instrument List will change from “Issued” to “Voided” and the Void Reason will auto-populate. Blue dots from future benefits should change back to green allowing issuance of updated food benefits.



Clay Family		Colin Clay					
Family ID: F00100006513 1456 California Way ALAMANCE, NC 27201		Participant ID: 954558516L Age: 1 month WIC Category: Infant					
Search Criteria Exact <input type="radio"/> From Date: 2/1/2017 To Date: 6/22/2017 Range <input type="radio"/> Issue Date <input type="radio"/> Search							
Family Food Instruments Total Items: 4							
Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date	Print Date	Voided Date	Void Reason
100038811	6/20/2017	7/19/2017	Issued	6/20/2017			
100038812	7/20/2017	8/19/2017	Voided	6/20/2017		6/22/2017	Food Prescription Change
100038813	8/20/2017	9/19/2017	Voided	6/20/2017		6/22/2017	Food Prescription Change
100038819	6/22/2017	7/19/2017	Issued	6/22/2017			

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8. **Support Staff** returns to the **Issue Food Instruments** screen to reissue updated benefits for future months for the entire family.

Clay Family
 Family ID: F00100006513
 1456 California Way
 ALAMANCE, NC 27201

Colin Clay
 Participant ID: 954558516L
 Age: 1 month
 WIC Category: Infant

Issue Food Instruments Configuration

Family Issuance Day: 20
 Issuance Frequency: 3 Month(s)

Family Issuance Members (Total Items: 1)

Category	Participant	Certification End Date	Jun	Jul	Aug
Infant	Colin Clay	5/1/2018	Issued	Full	Full

FDTS: 7/20/2017 - LDTS: 8/19/2017 (Total Items: 1)

Food Category	Subcategory	Quantity	UOM
Exempt Infant Formula	Nutramigen Concentrate 13 oz.	31	Can

FDTS: 8/20/2017 - LDTS: 9/19/2017 (Total Items: 1)

Food Category	Subcategory	Quantity	UOM
Exempt Infant Formula	Nutramigen Concentrate 13 oz.	31	Can

Formula Wizard | Next Certification Due Notice | Issue | Cancel

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