

# Formula Wizard

The **Formula Wizard** screen displays automatically for the current month on or after the Family Issuance Day (FID) when issuing food benefits for a participant with a food package containing contract or exempt infant formula or WIC Eligible Nutritionals (WEN) that are currently in on-site inventory.

NOTE: Federal Regulations restrict issuance of physical cans of formula before the FID. In addition, the quantity of cans issued from Inventory must not exceed a one-month supply.

This resource includes three scenarios:

1. Issuing formula to an infant receiving a default food package (pages 1-4)
2. Issuing formula to a participant who has special formula ordered from the Nutrition Services Branch (NSB) (pages 5-6)
3. Issuing formula to a participant who has formula ordered from NSB but has already been issued food (pages 7-9)

**Scenario One:** Issuing formula to an infant receiving a default food package

1. The user has prescribed a food package on the Prescribe Food screen and clicked the Save button.

The screenshot displays the 'Prescribe Food' screen for the 'Wizard Family'. The interface includes a navigation menu at the top with options like 'Scheduling', 'Vendor', 'Operations', 'Finance', 'Administration', and 'Help'. The main content area shows the following details:

- Wizard Family:** Family ID: F00100006512, 125 Magic Lane, ALAMANCE, NC 27201.
- Participant:** William Wizard, Participant ID: 954588514P, Age: 2 months, WIC Category: Infant.
- Food Prescription:** Date: 6/19/2017, WIC Category: Infant, Age Category: 1 to 3 Months, Breastfeeding Status: Fully Formula Fed, Family Issuance Day: 19, Issuance Frequency: 3 Month(s).
- Food Prescription Items:** A table with one item: Infant Formula (IF), Category: ABC milk-based powder 14 oz, Quantity: 806, Category Max Quantity: 806, UOM: Ounces.
- Add Item to Food Prescription:** Fields for Category, Subcategory, Quantity (0), Max / Med Max, and UOM, with 'Add Item' and 'Clear' buttons.
- Infant Formula Summary Table:**

Month	Jun	Jul	Total
ABC std pwrdr Quantity	806	806	1612 / 90
# Cans	9	9	18

At the bottom right, there are buttons for 'Alternate Funding', 'Medical Documentation', 'Save', and 'Cancel'. The 'Save' button is highlighted with a red box.

# Formula Wizard

2. The **Formula Wizard** appears.
3. Look at **# Prescribed** to see how many cans the infant will receive for the current month (in this case it is 9).
4. Next, look at **# on Hand** (in this case it is 25, the number of cans in Local Inventory).

Formula Wizard

Formula Issuance Summary Current Month

Formula	# Prescribed	# from Local Inventory	# from Formula Warehouse	Total Issued
ABC milk-based powder 14 oz	9	0	0	0

Issue from Local Inventory

Do you want to issue from Local Inventory?

ABC milk-based powder 14 oz

# On Hand	# to Issue
25	

Inventory for Alamance County

Local Agency/Clinic	# On Hand	# Requested
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Request

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5. Decide how many cans to issue from Formula Wizard (in this case 2 cans).
6. Click **Next**.

Formula Wizard

Formula Issuance Summary Current Month

Formula	# Prescribed	# from Local Inventory	# from Formula Warehouse	Total Issued
ABC milk-based powder 14 oz	9	2	0	2

Issue from Local Inventory

Do you want to issue from Local Inventory?

ABC milk-based powder 14 oz

# On Hand	# to Issue
25	2

Inventory for Alamance County

Local Agency/Clinic	# On Hand	# Requested
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Request

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# Formula Wizard

- The Formula Wizard closes and the **Issue Food Instruments** screen displays. The formula item displays in the **FDTS-LDTS** grid. Note the number of cans for the current month has been reduced by the number issued from inventory. In this case, there are only 7 cans listed for the first month of issuance instead of 9 cans.
- If you still need to change the number of cans you want to issue from inventory, you can do so by clicking on the **Formula Wizard** button.
- When you are ready to issue food benefits, click the **Issue** button.

The screenshot displays the 'Issue Food Instruments' software interface. At the top, there is a navigation menu with options: Scheduling, Vendor, Operations, Finance, Administration, and Help. Below the menu, the user's profile is shown as 'Wizard Family' with details: Family ID: F00100006512, 125 Magic Lane, ALAMANCE, NC 27201. To the right, the participant's information is displayed: William Wizard, Participant ID: 954558514P, Age: 2 months, and WIC Category: Infant. The main section is titled 'Issue Food Instruments' and includes a 'Configuration' area with 'Family Issuance Day' set to 19 and 'Issuance Frequency' set to 3 Month(s). Below this is a 'Family Issuance Members' table with columns for Category, Participant, Certification End Date, and months (Jun, Jul, Aug). A table below shows 'FDTS-LDTS' periods and their corresponding 'Quantity' and 'UOM' (Can). The 'Quantity' for the first period (6/19/2017 - 7/18/2017) is 7, which is highlighted with a red box. At the bottom left, a 'Formula Wizard' button is highlighted with a red box. At the bottom right, an 'Issue' button is highlighted with a red box. The status bar at the bottom shows '001-01 - Alamance - Burlington' and 'TAB'.

# Formula Wizard

10. The Food Benefits Issuance Signature Confirmation displays. This confirmation includes the Food Instrument Numbers issued and the number of cans of formula issued from Local Inventory.

11. Have the family confirm receipt by signing electronically.

12. The Food Instrument List will show Status: **Redeemed** for the Food Instrument (FI) Number that corresponds with the formula issued from Local Inventory.

Search Criteria

Exact    From Date: 2/1/2017    To Date: 6/19/2017    Search

Range

Issue Date

Family Food Instruments						
	Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date	
<input type="checkbox"/>	100038804	6/19/2017	7/18/2017	Redeemed	6/19/2017	
<input type="checkbox"/>	100038805	6/19/2017	7/18/2017	Issued	6/19/2017	
<input type="checkbox"/>	100038806	7/19/2017	8/18/2017	Issued	6/19/2017	
<input type="checkbox"/>	100038807	8/19/2017	9/18/2017	Issued	6/19/2017	

# Formula Wizard

**Scenario Two:** Using the Formula Wizard to issue formula to a participant prescribed special formula that is ordered from NSB. Issuance Frequency is 1 month. In this scenario, the participant is prescribed an exempt infant formula or WIC Eligible Nutritional (WEN) that cannot be redeemed through a WIC Vendor and therefore must be ordered from NSB. Examples include: Enfamil Premature 20 Iron Fortified RTF 2 oz., Pregestimil 20 Cal RTF 2 oz., Similac Special Care 30 w/Iron RFT 2 oz. and Vivonex Pediatric Powder 1.7 oz.

**NOTE:** **any** formula ordered from NSB and issued through the Formula Wizard or through the Inventory module must be issued **monthly**. Federal Regulations restrict issuance of physical cans of formula to a **one-month** supply.

1. Complete the **Prescribe Food** screen and **Medical Documentation** screen for the participant with a special formula to be ordered from NSB.
2. On the **Issue Food Instruments** screen, change **Issuance Frequency** to 1 month. Any formula ordered from NSB must be issued monthly.
3. Order special formula from NSB. Refer to the WIC Program Manual (WPM) Chapter 7, Section 6 for more detailed guidance.
4. Once the shipment of special formula is delivered to the local agency, add the special formula to the Crossroads inventory. Refer to “Inventory” for more detailed guidance.
5. Contact the family to let them know that the special formula has arrived. Remember to check the Family Issuance Day (FID) and have the family come in ON or AFTER that date. As noted previously, Formula Wizard is not operational prior to FID in order to comply with Federal Regulations.
6. When the family comes into clinic to pick up the special formula, navigate to the **Issue Food Instruments** screen in the participant’s WIC record in Crossroads. Click the **Formula Wizard** button on the bottom left of the Crossroads screen.
7. Look at **# Prescribed** to see how many cans the participant should receive (in this case it is 403).
8. Next, look at **# on Hand** (In this case it is 464). Enter the exact number of cans the participant is prescribed (403) and click **Next**.

Formula	# Prescribed	# from Local Inventory	# from Formula Warehouse	Total Issued
Similac Special Care 30 w/ Iron RTF 2 oz	403	403	0	403

Do you want to issue from Local Inventory?

Similac Special Care 30 w/ Iron RTF 2 oz NSB

# On Hand	# to Issue
464	403

Inventory for Alamance County Total Items: 0

Local Agency/Clinic	# On Hand	# Requested
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Request

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# Formula Wizard

- The Formula Wizard closes and the **Issue Food Instruments** screen displays. Click **Issue**.
- The **Food Benefits Issuance Signature Confirmation** displays. This confirmation includes the number of cans of formula issued from Inventory.

The screenshot shows a dialog box titled "Food Benefits Issuance Signature Confirmation". It contains the following text: "Have the family confirm receipt by signing electronically for checks and for the following Formula issued from Local Inventory." Below this, a red box highlights the text "Similac Special Care 30 w/ Iron RTF 2 oz NSB 403 Cans". Underneath, it says "To sign later click the Sign Later button." There is a section titled "Food Benefits Signed/Received by" with two radio button options: "Crabtree Park (Parent/Guardian 1)" (selected) and "crossroads36 (Staff)". At the bottom, there are "Clear", "Save", and "Sign Later" buttons.

- Have the family confirm receipt by signing electronically.
- The **Food Instrument List** will show Status: **Redeemed** for the FI Number that corresponds with the formula issued from Inventory.

The screenshot shows a table titled "Family Food Instruments" with a search criteria section above it. The search criteria are set to "Issue Date" with a range from 2/1/2017 to 6/20/2017. The table has the following columns: Serial #, First Date to Spend, Last Date to Spend, Status, Issue Date, Print Date, Voided Date, and Void Reason. A red box highlights the "Redeemed" status in the first row.

Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date	Print Date	Voided Date	Void Reason
100038816	6/20/2017	7/19/2017	Redeemed	6/20/2017			

# Formula Wizard

**Scenario Three:** Issuing formula to a participant who has formula ordered from NSB but has already been issued food. In these cases the **Formula Wizard** button is greyed out and cannot be used. Example:

On 2/13, the child was issued 3 months of food benefits: February, March, and April. The child is prescribed food and WEN.

On 4/19, the family comes to clinic to pick up Peptamen Jr. ordered from NSB for the child. The issuance dot for April is blue due to the previous food issuance. Food benefits have been redeemed for the current month so voiding the current month is not an option.

**Workaround: Issue to the family through Inventory.** Although formula can be issued through Inventory, it is not the best practice. Formula issued through Inventory is not connected to the family's record or participation in Crossroads. Also, issuing through Inventory allows for more than 1 month of formula/WEN to be issued which is against Federal Regulations. Therefore, this method should only be used if the issuance dot is blue for the current month and food benefits have been redeemed. Otherwise, void the current month and use the Formula Wizard and the issuance screen to issue current month benefits to include the formula ordered from NSB. If the local user issues formula through Inventory, it must be limited to a one-month supply. The local user must document the type and quantity of formula issued through Inventory in the participant's Crossroads record.

## Steps to Issue Formula through Inventory:

1. Navigate to Operations > Inventory > Search Product Inventory
2. Choose Formula in the **Inventory Type** dropdown menu and click **Search**

3. Find the formula to be issued in the **Inventory Search Results (Products)** list and place a checkmark in the box. **Inventory Search Results (Items)** will display with the formula name, status and quantity.

Inventory Search Results (Products) <span>Total Items: 21</span>						Inventory Search Results (Items) <span>Total Items: 1</span>				
	Inventory Product ID	Inventory Product Name	Total on Order	Reorder Point	Total on Hand	Item ID	Item Name	State Inventory Number	Status	Quantity
<input type="checkbox"/>	101	Gerber Good Start Soy Powder 12.9 oz	0	0	0					
<input type="checkbox"/>	111	Neocate Jr with Prebiotics Powder 14.1 oz	0	0	1					
<input type="checkbox"/>	114	Nutramigen Conc 13 oz	0	0	5					
<input type="checkbox"/>	122	PediaSure 1.5 cal RTF 8 oz	0	0	2					
<input type="checkbox"/>	126	PediaSure Peptide 1.0 flavored RTF 8 oz	0	0	0					
<input checked="" type="checkbox"/>	128	Peptamen Junior RTF 8.45 oz	0	0	100	76795	Peptamen Junior RTF 8.45 oz		On Hand	100
<input type="checkbox"/>	144	Similac NeoSure Powder 13.1 oz	0	0	2					
<input type="checkbox"/>	159	Nutramigen Enflora LGG Powder 12.6 oz.	0	0	9					
<input type="checkbox"/>	172	PediaSure Peptide 1.5 cal Flavored RTF 8 oz	0	0	22					

# Formula Wizard

4. Place a checkmark in the box next to the formula in the **Inventory Search Results (Items)** with a Status of On Hand. This will enable the **Issue** button. Click **Issue**.

	Item ID	Item Name	State Inventory Number	Status	Quantity
<input checked="" type="checkbox"/>	76795	Peptamen Junior RTF 8.45 oz		On Hand	100

Selected Row Details

Issue Reserve Dispose Return Items

5. The **Issue Inventory Items** screen will appear. Click the **Lookup Family** button and search for the participant to be issued formula.

Issue To ★

Nothing Selected

Lookup Family

Inventory Items to Issue Total Items: 1

Item ID	Item Name	State Inventory Number	Status	Quantity	Quantity to Issue
76795	Peptamen Junior RTF 8.45 oz		On Hand	100	1

6. Double click on the participant's name in the **Search Results** container.

Family Search

Search Criteria

Search Location:  State-Wide  Local Agency  Clinic

Search Type:  Family  Participant  Caretaker  Proxy

Family ID: Last Name: First Name: M.I.: Telephone Number: Date of Birth:

Participant ID: Medicaid Number: EBT Card Number:

Search Clear Criteria

Search Results Total Items: 2

Family ID	Participant ID	Last Name	First Name	M.I.	Date of Birth	Category	Medicaid Number	Status	Certification End Date	Parent/Guardian 1 Name
F00600004439	960134116L	Sock	Red		6/2/1995	N		Active/Certified	11/30/2018	Red Sock
F00600004439	960134116L	Sock	Red		6/2/1995	N		Active/Certified	11/30/2018	Red Sock

Selected Row Details

# Formula Wizard

7. Enter the Quantity to Issue (**no more than** one month of issuance) and click the **Issue** button

**Issue Inventory Items**

**Issue To** ★

**Sock Family**  
Family ID: F00600004439  
124 Fenway Lane  
BOLIVIA, NC 28422

**Inventory Items to Issue** Total Items: 1

Item ID	Item Name	State Inventory Number	Status	Quantity	Quantity to Issue
76795	Peptamen Junior RTF 8.45 oz		On Hand	100	50

Expected Return Date

Comments

crossroads36 New 6/14/2

**Issue**

8. User will receive the status message: "Inventory Items were successfully issued."

9. Return to the participant's Crossroads record and document the type and quantity of formula issued through Inventory in the Care Plan.