

## Exchange Type of Formula After Issuance

After Food Instruments (FIs) have been received and one or more FIs have been redeemed for the current month, infant formula, exempt infant formula or WIC Eligible Nutritionals (WEN) may need to be exchanged for a different type of product.

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 is available on the same day the original prescription is created.

For a one-page summary, please refer to “Exchange Type of Formula (or WIC Eligible Nutritionals) After Issuance – Quick Reference Guide.”

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

- Modify the 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
- Void and reissue family FIs 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**.

**Food Prescription**

Food Prescription Date: 4/27/2015

Month	Apr	May	Jun	Jul	Total
Quantity	806	806	806	806	3224 / 90
# Cans	9	9	9	9	36

Select the New Food Prescription Date

Food Prescription Date

4/28/2015

Save Cancel

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

The screenshot displays the 'Prescribe Food' interface for 'Poplar Family'. The 'Food Prescription' section shows a date range from 4/27/2015 to 10/1/2015. The 'Food Prescription Items' table lists 'Infant Formula (IF)' with a quantity of 806. The 'Add Item to Food Prescription' form is active, showing 'Exempt Infant Formula (EXF)' as the category and 'Nutramigen Enflora LGG Powder 12.6 oz.' as the subcategory, with a quantity of 806. The 'Add Item' button is highlighted with a red box. Below the form is a summary table for 'Infant Formula'.

Infant Formula							
	Month	Apr	May	Jun	Jul	Total	
Gerber Good Start Gentle Powder 12.7 oz.	Quantity	806	806	806	806	3224	90
	# Cans	9	9	9	9	36	

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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 exempt 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.

The screenshot shows the 'Prescribe Food' software interface for the 'Poplar Family'. The interface includes a navigation menu on the left, a top navigation bar, and a main content area. A 'Validation Summary' pop-up is displayed, indicating that the category maximum has been exceeded for Infant Formula (IF) for prescriptions with dates 4/28/2015 and 5/1/2015. The 'Save' button is highlighted with a red box.

**Validation Summary: 2**

- Category maximum exceeded for Infant Formula (IF) for prescription with date 4/28/2015 12:00:00 AM
- Category maximum exceeded for Infant Formula (IF) for prescription with date 5/1/2015 12:00:00 AM

**Food Prescription Items Table:**

Category	Subcategory	Quantity	Category Max Quantity	UOM
Infant Formula (IF)	Gerber Good Start Gentle Powder 12.7 oz.	806	806	Ounces
Exempt Infant Formula (EXF)	Nutramigen Enflora LGG Powder 12.6 oz.	806	806	Ounces

**Infant Formula Summary Table:**

Item	Month	Apr	May	Jun	Jul	Total
Gerber Good Start Gentle Powder 12.7 oz.	Quantity	806	806	806	806	3224 / 90
	# Cans	9	9	9	9	36
Nutramigen Enflora LGG Powder 12.6 oz.	Month	Apr	May	Jun	Jul	Total
	Quantity	806	806	806	806	3224 / 87
	# Cans	10	10	9	9	38

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4. **Support Staff** navigates to the Exchange/Increase Formula screen.

On the Exchange/Increase Formula screen, a participant may return:

- Cans of formula/WEN only
  - Unused formula/WEN FIs
  - A combination of formula/WEN and unused formula/WEN FIs
- a) Enter the number of physical cans of formula returned by the participant in the quantity field. Leave blank if no physical cans are returned.
  - b) Enter the serial number(s) of any unredeemed formula FI(s) for the current month. Leave blank if no physical FIs are returned.
  - c) The total returned cans entered cannot be more than the amount originally issued. Formula is replaced on an ounce for ounce basis.
  - d) In the **Select the Replacement Formula** container, select the newly prescribed Replacement Formula **Food Category** and **Food Subcategory** from the dropdowns and select **Save**.
  - e) 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, the FIs with the new formula will automatically print. Have the participant sign for the replacement benefits. The current month's benefits for additional family members are not affected.

NOTE: 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 physical cans of formula entered, serial numbers of returned unredeemed formula FIs added, replacement formula selected, total replaced cans and the **Save** button enabled.

The screenshot shows a web application interface for managing formula exchanges. The top navigation bar includes 'Home', 'Family Services', 'Scheduling', 'Operations', 'Finance', 'Administration', and 'Help'. The user is logged in as 'Cross roads'.

**Family Information:**  
**Poplar Family**  
 Family ID: F02000003644  
 125 Kentucky Lane  
 RALEIGH, NC 27609  
**Exotic Poplar**  
 Participant ID: 954116040T  
 Age: 27 days  
 WIC Category: Infant

**Exchange or Increase Formula**

**Select the Formula Being Returned**

Food Category: Infant Formula (IF) | Food Subcategory: Gerber Good Start Gentle Powder 12.7 oz. | Quantity: 2 Cans

**Enter Returned Food Instrument(s)**

Serial # [input] [Add] [Clear]

Serial #	Subcategory	Quantity
100018312	Gerber Good Start Gentle Powder 12.7 oz.	4
100018313	Gerber Good Start Gentle Powder 12.7 oz.	1

Total Items: 2

**Summary:**  
 Cans Originally Issued: 9 | Total Returned Cans: 7  
 RFO Newly Prescribed: 0 | Cans Newly Prescribed: 0 | Cans After Proration: 0  
 Total Cans: 7  
 Total RFO: 630

**Select the Replacement Formula**

Food Category: Exempt Infant Formula (EXF) | Food Subcategory: Nutramigen Enflora LGG Powder 12.6 oz. | Total Replaced Cans: 8

Buttons: [Formula Wizard] [Save] [Cancel]

Footer: Online | Version 1.6.4.3 | 10029 | 018-01 - Catawba - Hickory | TAB | 100%

# Exchange Type of Formula After Issuance

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:

Search Criteria

Exact    **From Date**    **To Date**  
 Range    12/1/2014    4/28/2015    Search  
 Issue Date

Family Food Instruments    Total Items: 26

	Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date	Print Date	Voided Date	Void Reason
<input type="checkbox"/>	100018316	4/27/2015	5/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018317	4/27/2015	5/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018318	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018319	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018320	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018321	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018322	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018323	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018324	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018325	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018326	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018327	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018328	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018329	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018330	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018331	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018332	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018333	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018334	4/28/2015	5/26/2015	Issued	4/28/2015	4/28/2015		
<input type="checkbox"/>	100018335	4/28/2015	5/26/2015	Issued	4/28/2015	4/28/2015		

Conversion Void    Void Selected    Replace    Cancel

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

# Exchange Date Type of Formula After Issuance

After benefits are reorganized:

**Search Criteria**

Exact     
 **From Date**      
 **To Date**      

Range     
  Issue Date

**Family Food Instruments** Total Items: 26

<input type="checkbox"/>	Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date	Print Date	Voided Date	Void Reason
<input type="checkbox"/>	100018313	4/27/2015	5/26/2015	Voided	4/27/2015	4/27/2015	4/28/2015	Returned by Participant
<input type="checkbox"/>	100018312	4/27/2015	5/26/2015	Voided	4/27/2015	4/27/2015	4/28/2015	Returned by Participant
<input type="checkbox"/>	100018335	4/28/2015	5/26/2015	Issued	4/28/2015	4/28/2015		
<input type="checkbox"/>	100018334	4/28/2015	5/26/2015	Issued	4/28/2015	4/28/2015		
<input type="checkbox"/>	100018325	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018324	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018318	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018322	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018321	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018320	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018319	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018323	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018332	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018333	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018327	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018331	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018328	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018326	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018330	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input type="checkbox"/>	100018329	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		

Conversion Void

Current month's benefits reorganized and displayed at the top.

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

▼ Search Criteria

Exact      **From Date** 12/1/2014      **To Date** 4/28/2015     

Range

Issue Date

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**Family Food Instruments** Total Items: 26

<input type="checkbox"/>	Serial #	First Date to Spend ▲	Last Date to Spend	Status	Issue Date	Print Date	Voided Date	Void Reason
<input type="checkbox"/>	100018313	4/27/2015	5/26/2015	Voided	4/27/2015	4/27/2015	4/28/2015	Returned by Participant
<input type="checkbox"/>	100018312	4/27/2015	5/26/2015	Voided	4/27/2015	4/27/2015	4/28/2015	Returned by Participant
<input type="checkbox"/>	100018335	4/28/2015	5/26/2015	Issued	4/28/2015	4/28/2015		
<input type="checkbox"/>	100018334	4/28/2015	5/26/2015	Issued	4/28/2015	4/28/2015		
<input checked="" type="checkbox"/>	100018325	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input checked="" type="checkbox"/>	100018324	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input checked="" type="checkbox"/>	100018318	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input checked="" type="checkbox"/>	100018322	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input checked="" type="checkbox"/>	100018321	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input checked="" type="checkbox"/>	100018320	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input checked="" type="checkbox"/>	100018319	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input checked="" type="checkbox"/>	100018323	5/27/2015	6/26/2015	Issued	4/27/2015	4/27/2015		
<input checked="" type="checkbox"/>	100018332	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input checked="" type="checkbox"/>	100018333	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input checked="" type="checkbox"/>	100018327	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input checked="" type="checkbox"/>	100018331	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input checked="" type="checkbox"/>	100018328	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input checked="" type="checkbox"/>	100018326	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input checked="" type="checkbox"/>	100018330	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		
<input checked="" type="checkbox"/>	100018329	6/27/2015	7/26/2015	Issued	4/27/2015	4/27/2015		

## Exchange Type of Formula After Issuance

7. A **Confirm Action** screen displays with the FIs to be voided. 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 (not shown).

**Confirm Action**

**FIs to be Voided** Total Items: 18

Serial #	Issued Format
100034249	Paper
100034250	Paper
100034251	Paper
100034252	Paper
100034253	Paper
100034254	Paper
100034255	Paper
100034256	Paper
100034257	Paper
100034258	Paper
100034259	Paper

**Reason** ★

Food Prescription Change

**Void** **Cancel**

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