

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 medical foods (WEMF) 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 Medical Foods) 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 WEMF, 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

Exchange Type of Formula After Issuance

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**.

Prescribe Food Cross roads

Home Family Services Scheduling Operations Finance Administration Help Logout

Poplar Family
Family ID: F02000003644
125 Kenbucky Lane
RALEIGH, NC 27609

Exotic Poplar
Participant ID: 954116040T
Age: 27 days
WIC Category: Infant

Food Prescription

Food Prescription Date: 4/27/2015  WIC Category: Infant Age Category: 0 Months Breastfeeding Status: Fully Formula Fed Family Issuance Day: 27 Issuance Frequency: 3 Month(s)

4/27/2015 5/1/2015 8/1/2015 10/1/2015 4/1/2016
0 Months 1 to 3 Months 4 to 5 Months 6 to 11 Months 12 to 23 Month

Category	Subcategory	Quantity	Category Max Quantity	UOM
Infant Formula (IF)	Gerber Good Start Gentle Powder 12.7 oz.	806	806	Ounces

Add Item to Food Prescription

Category	Subcategory	Quantity	Max / Med Max	UOM
		0	/	

Infant Formula

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

Alternate Funding Medical Documentation Save Cancel

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Select the New Food Prescription Date

Food Prescription Date

4/28/2015

Save Cancel

Exchange Type of Formula After Issuance

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' application interface. At the top, the user is logged in as 'Cross roads'. The main area shows details for 'Poplar Family' (Family ID: F02000003644) and 'Exotic Poplar' (Participant ID: 954116040T, Age: 27 days, WIC Category: Infant). The 'Food Prescription' section shows a date range from 4/27/2015 to 10/1/2015, with a WIC Category of 'Infant', Age Category of '0 Months', Breastfeeding Status of 'Fully Formula Fed', Family Issuance Day of '27', and Issuance Frequency of '3 Month(s)'. Below this, the 'Food Prescription Items' table lists one item: 'Infant Formula (IF)' with a quantity of 806 and a category max quantity of 806. The 'Add Item to Food Prescription' form is highlighted with a red box, showing 'Exempt Infant Formula (EXF)' as the category, 'Nutramigen Enflora LGG Powder 12.6 oz.' as the subcategory, and a quantity of 806. The 'Add Item' button is also highlighted with a red box. At the bottom, there is a summary table for 'Infant Formula' showing monthly quantities and a total of 3224 / 90.

Category	Subcategory	Quantity	Category Max Quantity	UOM
Infant Formula (IF)	Gerber Good Start Gentle Powder 12.7 oz.	806	806	Ounces

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 zeroed out or deleted. After all prescriptions are updated, the pop-up will disappear. Select the **Save** button to continue.

Prescribe Food Cross roads

Home Family Services Scheduling Operations Finance Administration Help Logout

Quick Links

- New Family
- Family Search
- Certification
 - Family Demographics
 - Family Assessment
 - Participant Demographics
 - Income Information
 - Certification Signature
 - Anthro / Lab
 - Health Information
 - Eco-Social Assessment
 - Dietary & Health
 - Assigned Risk Factors
 - Certification Summary
 - Identification Document
 - Family Alerts
 - Notes
 - Scanned Documents
- Care Plan
- Issue Benefits
 - Prescribe Food
 - Issue Food Instruments
 - Issue FM Food Instruments
 - Food Instrument List
 - Exchange/Increase Formula
- Journal of Transactions
- Subsequent Certification
- Scheduling System
 - Family Appointments
 - Quick Appointments
 - Clinic Master Calendar

Poplar Family
 Family ID: F02000003644
 125 Kentucky Lane
 RALEIGH, NC 27609

Participant ID: 954116040T
 Age: 27 days
 WIC Category: Infant

Food Prescription

4/27/2015 4/28/2015 5/1/2015 8/1/2015 10/1/2015
 0 Months 0 Months 1 to 3 Months 4 to 5 Months 6 to 11 Months

Food Prescription Date: 4/28/2015
 WIC Category: Infant
 Age Category: 0 Months
 Breastfeeding Status: Fully Formula Fed
 Family Issuance Day: 27
 Issuance Frequency: 3 Month(s)

Food Prescription Items Total Items: 2

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

Add Item to Food Prescription

Category: Subcategory: Quantity: Max / Med Max: UOM: Add Item Clear

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
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

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

Alternate Funding Medical Documentation **Save** Cancel

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Exchange Type of Formula After Issuance

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

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

- Cans of formula/WEMF only
 - Unused formula/WEMF FIs
 - A combination of formula/WEMF and unused formula/WEMF 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.

Exchange Type of Formula After Issuance

This screenshot displays physical cans of formula entered, serial numbers of returned unredeemed formula FIs added, replacement formula populated and the **Save** button enabled.

Exchange/Increase Formula Cross roads

Home Family Services Scheduling Operations Finance Administration Help Logout

Poplar Family
Family ID: F02000003644
125 Kentucky Lane
RALEIGH, NC 27609

Eastern Exotic

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 # [Add] [Clear]

Returned Food Instruments Total Items: 2

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

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

[Formula Wizard] [Save]

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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:

The screenshot shows a software interface with a search criteria section at the top and a table of Family Food Instruments below. The search criteria include radio buttons for 'Exact', 'Range', and 'Issue Date', with 'Issue Date' selected. The 'From Date' is 12/1/2014 and the 'To Date' is 4/28/2015. The table has columns for Serial #, First Date to Spend, Last Date to Spend, Status, Issue Date, Print Date, Voided Date, and Void Reason. The 'First Date to Spend' column is highlighted with a red box. A text box on the right states: 'In this example, newly issued benefits display at the bottom of the Family Food Instruments list.'

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

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		

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

Exchange Type of Formula After Issuance

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** **To Date**
 Range 12/1/2014 4/28/2015
 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 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 **Returned by Participant** 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 [Close]

FIs to be Voided Total Items: **16**

Serial #
100018318
100018319
100018320
100018321
100018322
100018323
100018324
100018325
100018326
100018327
100018328

Reason ★

Returned by Participant

Void **Cancel**

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