

Transfer: eWIC to Paper

This resource provides step-by-step instructions on how to complete the following types of Transfers:

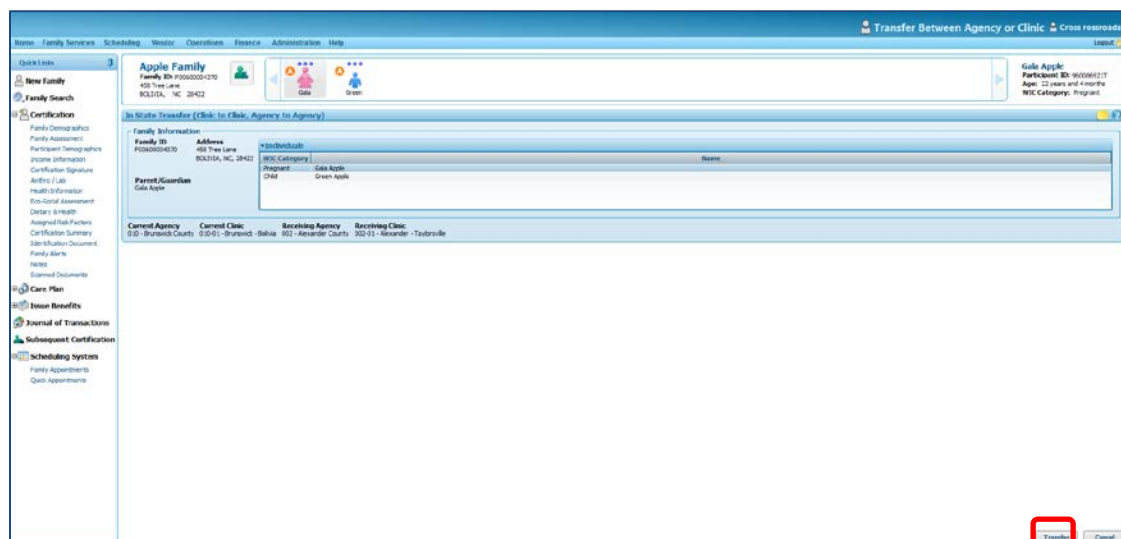
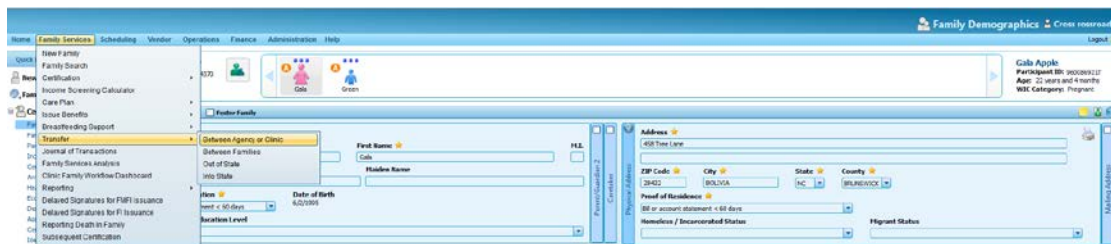
- Transfer Family from an eWIC Clinic to a Paper-based Clinic
- Transfer Individual (Between Families) from an eWIC Clinic to a Paper-based Clinic
- Transfer **Foster Child** (Between Families) from an eWIC Clinic to a Paper-based Clinic

Transfer Family from an eWIC Clinic to a Paper-based Clinic

1) Locate family's record in Crossroads by completing a **State-Wide Family Search**. Click on pencil icon to open the record.

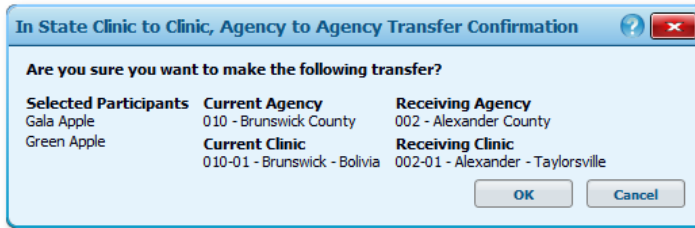


2) Click on Family Services > Transfer > Between Agency or Clinic and then click the **Transfer** button located on the bottom right of the Transfer screen



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3) Local user will receive a Confirmation Message. If the information is correct, click OK.



4) If the family has transferred from an eWIC Clinic to a Paper-based Clinic, does not have any currently issued eWIC food benefits, and is eligible for issuance, complete the following steps:

- a. Go to the Family Demographics screen and update the family's address and voter registration..
- b. Have CPA verify that the family's current Food Prescriptions are accurate.
- c. Issue paper Food Instruments (FIs).

Note: Do NOT deactivate the eWIC card. After the transfer occurs, the participant's eWIC card will continue to be in an active status. The participant may keep the eWIC card as it will be used when the paper-based clinic becomes eWIC.

5) If the family has transferred from an eWIC Clinic to a Paper-based Clinic and has eWIC food benefits for the current or future months, the family can do one of the following:

- a. Redeem eWIC food benefits for the current and future months until the Last Date to Spend (LDTS) if there are local vendors accepting eWIC.
- b. Redeem eWIC food benefits for the current month and have future eWIC benefits voided and reissued as paper FIs.

Note: Current month eWIC food benefits **cannot** be voided and replaced with paper FIs if **ANY** of the eWIC benefits for the current month have been redeemed.

Voiding future month eWIC food benefits:

- Go to **Issue Benefits > Food Instrument List** and place a check mark next to each FI number for the future months and then click the "Void Selected" button
- A Confirm Action popup will display. The Issued Format of the FIs to be Voided will be displayed as **EBT**. Choose a Reason in the drop-down box and click the Void button.
- Review issuance dots for future months to verify that they have changed from blue to green indicating issuance availability.

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Transfer Individual (Between Families) from an eWIC Clinic to a Paper-based Clinic

- 1) Locate participant's record in Crossroads by completing a **State-Wide Family Search**. Click on the pencil icon to open the record.

Family ID	Participant ID	Last Name	First Name	FLI	Date of Birth	Category	Medical Number	Status	Certification End Date	Agency	Clinic	Parent/Guardian 1 Name
	960089940	Mandarin	Valencia		5/2/1995	P		Active/Certified	3/15/2018	010 - Brunswick County	010-01 - Brunswick - Bolivia	Mandarin Orange

- 2) Click on Family Services > Transfer > Between Families.

Transfer

- Between Agency or Clinic
- Between Families**
- Out of State
- Into State

- 3) Select the Individual being transferred in the **In-State Transfer (Individual to Family)** box. Next enter the name of the Receiving Family and click the **Search** button.

In State Transfer (Individual to Family)

Current Family Information

Family ID: F0060004379
Address: 125 Florida Grove Drive, BOLIVIA, NC, 28422

Parent/Guardian: Mandarin Orange

Individuals

WIC Category: Name

Pregnant: Mandarin Orange

Child: Valencia Orange

Receiving Family Search

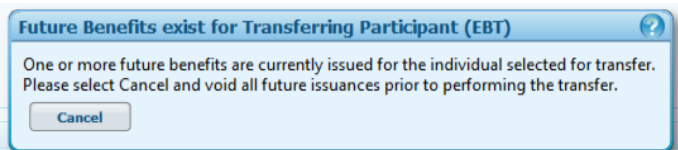
Search Location: Search Type: Family ID: Last Name: Apple, First Name: Anna, P.L.I., Telephone Number, Date of Birth, Participant ID, Medical Number, EBT Card Number

Search Results

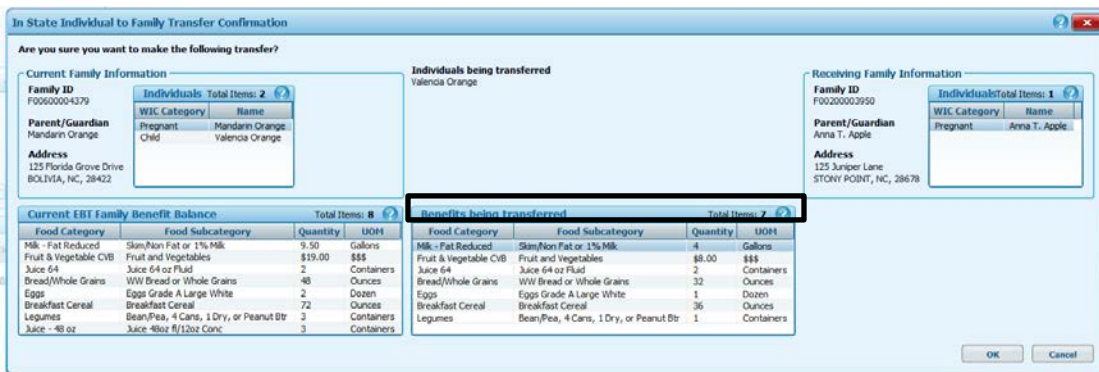
Family ID	Participant ID	Last Name	First Name	FLI	Date of Birth	Category	Medical Number	Status	Certification End Date	Parent/Guardian 1 Name
F0020003990	NC300001364	Apple	Anna	T	5/1/1995	P		Active/Certified	1/21/2018	Anna Apple

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- Click the **Transfer** button located on the bottom right of the Transfer screen. If future benefits exist for the Transferring Participant, a status message will appear. The participant's sending family must have their future month's EBT benefits voided before the transfer can take place.



- Contact the sending clinic and request this action be completed. **Reminder:** void the future month's benefits only. Do NOT deactivate the eWIC card.
- After the future benefits have been voided, return to the **Transfer Between Families** screen, complete the necessary information and click the **Transfer** button.
- Local user will receive a **Confirmation Message**. If there is a gap in benefits due to a change in Family Issuance Day (FID), "Benefits to Cover Change in FID" will be listed. **Benefits being transferred**, if any, will also be listed. If the information is correct, click OK. Food benefits being transferred will be issued on paper FIs.

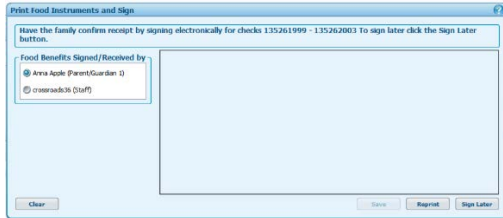


- If benefits are being transferred, a **Check Distribution Preview** will be displayed. To preview the benefits, click on the plus sign. Click the **Cancel** button to proceed with the transfer.



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- 6) A status message will display stating the individual has been successfully transferred. “Valencia Orange successfully transferred from Orange Family to Apple family.”
- 7) **Print Food Instruments and Sign** box will display. Have the family confirm receipt by signing electronically.



- 8) Click **Cancel** to leave the sending family’s record and then open the record of the receiving family. A Family Alert will appear with the message “Family Composition Change.”
- 9) If the individual has transferred from an eWIC Clinic to a Paper-based clinic and is eligible for issuance, complete the following steps:
 - a. Have CPA verify that the transferred participant’s current Food Prescription is accurate.
 - b. Issue Food Benefits

In this example:

- Sending Family Issuance Day (FID)= 7 and the Receiving FID=21
- **Issue Food Instruments** screen shows Issuance Availability for October and December. November has an Issued status referring to paper food benefits [FDTS 11/8/17 and LDTS 11/20/17] issued to the receiving family during the transfer. Issue ALL benefits available to the participant on the **Issue Food Instruments** screen. This will cover any gaps in benefits due to change in FID.

Category	Participant	Certification End Date	Oct	Nov	Dec	Total Items: 2
Pregnant	Anna T. Apple	2/21/2018	Issued	Issued	Issued	Change Rx
Child	Valencia Orange	11/6/2018	212	Issued	Full	Change Rx

Food Category	Subcategory	Quantity	UGHH
Milk - Full Cream	Skim/Non Fat or 1% Milk	18	Galons
Fruit & Vegetable CUB	Fruit and Vegetables	18	\$\$\$
Juice 64	Juice 64 oz Fluid	1	Containers
Bread/Whole Grains	W35 Bread or Whole Grains	22	Ounces
Eggs	Eggs Grade A Large White	1	Dozen
Breakfast Cereal	Breakfast Cereal	24	Ounces
Legumes	Bean/Pea, 4 Cans, 1 Dry, or Peanut Bty	1	Containers

Food Category	Subcategory	Quantity	UGHH
Milk - Full Cream	Skim/Non Fat or 1% Milk	18	Galons
Fruit & Vegetable CUB	Fruit and Vegetables	18	\$\$\$
Juice 64	Juice 64 oz Fluid	2	Containers
Bread/Whole Grains	W35 Bread or Whole Grains	22	Ounces
Eggs	Eggs Grade A Large White	1	Dozen
Breakfast Cereal	Breakfast Cereal	24	Ounces
Legumes	Bean/Pea, 4 Cans, 1 Dry, or Peanut Bty	1	Containers

Transfer: eWIC to Paper

Foster Child: Transfer Individual (Between Families) from an eWIC Clinic to a Paper-based Clinic

- 1) Locate participant's record in Crossroads by completing a **State-Wide** Family Search. Click on pencil icon to open the record.

Family ID	Participant ID	Last Name	First Name	M.I.	Date of Birth	Category	Medicaid Number	Status	Certification End Date	Agency	Clinic	Parent/Guardian 1 Name
F000004380	960086997T	Kiwi	Karen		2/2/2015	C		Active/Certified	11/6/2018	010 - Brunswick County	010-01 - Brunswick - Bolivia	Bartlett Pear

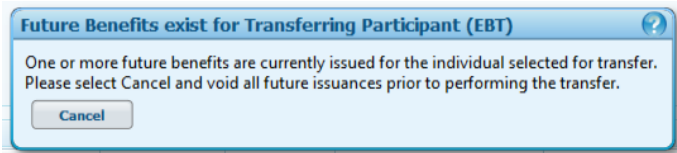
- 2) Click on Family Services > Transfer > Between Families.

- 3) Select the Individual being transferred using the **In-State Transfer (Individual to Family)** box. Next enter the name of the Receiving Family and click the **Search** button.

Family ID	Participant ID	Last Name	First Name	M.I.	Date of Birth	Category	Medicaid Number	Status	Certification End Date	Parent/Guardian 1 Name
F002000357		Spice	Cinnamon		5/2/1995					
F002000357	960087000C	Spice	Cinnamon		5/2/1995	P		Active/Certified	4/12/2018	Cinnamon Spice

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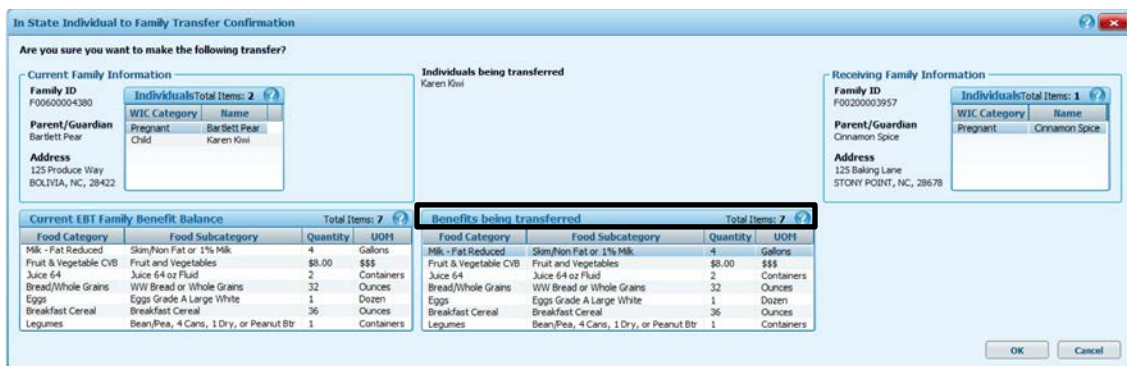
- Click the **Transfer** button located on the bottom right of the Transfer screen. If future benefits exist for the Transferring Participant, a status message will appear. The participant's future month's EBT benefits must be voided before the transfer can take place.



Contact the sending clinic and request this action be completed for the **foster child**. The sending clinic should NOT void the EBT benefits for any other active members of the sending family. (Note: select the foster child's icon in the Family Carousel before voiding future benefits.)

After the future benefits for the foster child have been voided, return to the **Transfer Between Families** screen, complete the necessary information and click the **Transfer** button.

Local user will receive a **Confirmation Message**. If there is a gap in benefits due to a change in Family Issuance Day (FID), "Benefits to Cover Change in FID" will be listed in this confirmation. **Benefits being transferred**, if any, will also be listed. If the information is correct, click **OK**. Food benefits being transferred will be issued on paper FIs. The **Electronic Benefits Account (EBA)** will no longer contain food benefits after the transfer.



Note: After the transfer occurs, the participant's eWIC card will continue to be in an active status even though the EBA does not contain food benefits. The participant may keep the eWIC card as it will be used when the paper-based clinic becomes eWIC. **Do NOT** deactivate the eWIC card.

Transfer: eWIC to Paper

- 5) If food benefits are being transferred, a Check Distribution Preview will be displayed. To preview the benefits, click on the plus sign. Click the **Cancel** button to proceed with the transfer.



- 6) A status message will display stating the individual has been successfully transferred.
- 7) **Print Food Instruments and Sign** box will display. Have the family confirm receipt by signing electronically.
- 8) Click Cancel to leave the sending family's record and then open the record of the receiving family. A Family Alert will appear with the message "Family Composition Change."
- 9) If the individual has transferred from an eWIC Clinic to a Paper-based clinic and is eligible for issuance, complete the following steps:
- Have CPA verify that the transferred participant's current Food Prescription is accurate.
 - Issue Food Benefits

In this example:

- Sending Family Issuance Day (FID)= 7 and the Receiving FID=23
- **Issue Food Instruments** screen shows Issuance Availability for October and December. November has an Issued status referring to paper food benefits [FDTS 11/7/17 and LDTS 12/6/17] issued to the receiving family during the transfer.
- Issue ALL benefits available to the participant on the **Issue Food Instruments** screen. This will cover any gaps in benefits due to change in FID.

