



**POLICY:** Local programs shall implement a food instrument (FI) issuance procedure to ensure WIC participants receive an appropriate food package at their initial certification and at subsequent nutrition education and follow up appointments. The maximum benefit is 3 months of food instrument issuance at one time.

**PURPOSE:** To provide guidance for local WIC program staff on when to appropriately issue and print food instruments (FIs).

**RELEVANT REGULATIONS:** 7CFR §246.7 ¶(f)(2)(iv)—Certification of participants-Processing standards  
7CFR §246.12—Food Delivery System

**OREGON WIC PPM  
REFERENCES:**

- ◆451—Change in Guardianship
- ◆500—Ordering and Receipt of Food Instrument Stock
- ◆506—Exceptions for Mailing Food Instruments
- ◆530—Food Instrument Register and FI Stub
- ◆540—Proxy System
- ◆560—Program Integrity: Replacing Food Instruments
- ◆595—Program Integrity: Separation of Duties
- ◆610—Proof of Identity and Residency
- ◆611—Certification and Issuing FIs to Relatives
- ◆635—Participant Notification: Eligibility and Rights & Responsibilities
- ◆640—Documentation Requirements in TWIST
- ◆641—Documentation Requirements in the Absence of TWIST
- ◆646—Mid-Certification Health Assessment
- ◆835—Nutrition Education: Attendance or Refusal

**DEFINITIONS:**

<i>Food Instrument (FI)</i>	“Food instrument” or “FI” means a negotiable financial instrument by which WIC benefits are provided to participants. Food instruments can provide either specific amounts of WIC authorized foods or formulas or a fixed-dollar amount for participants to obtain WIC authorized fruits and vegetables (referred to as a “Cash Value Voucher” or “CVV”). Food instruments are also referred to as “checks” or “vouchers.”
<i>Eligibility pending</i>	Status of a WIC participant who has not brought in all required proofs (proof of identity, residency and verification of income) at the time of new enrollment or recertification.
<i>FI stub</i>	The detachable bottom portion of the FI paper stock. When FIs are printed, FI issuance data is printed on this stub. There is also a signature line where the participant, parent or caretaker must sign when receiving FIs.
<i>Local print</i>	The printing of FIs at the local clinic or satellite sites.

## FI ISSUANCE AND PRINTING, *cont.*

<i>(DEFINITIONS:)</i>	<i>Single issuance</i>	When a participant is issued FIs for one month (also referred to as one month issuance).
	<i>Double issuance</i>	When a participant is issued FIs for two months (also referred to as two month issuance).
	<i>Triple issuance</i>	When a participant is issued FIs for three month (also referred to as three month issuance).
	<i>Second authorized signer</i>	The individual who has signed the WIC ID card on the second line with the permission of the first authorized signer. This individual may spend WIC FIs using the WIC ID card, but the WIC ID card does not act as proof of identity for this person.

### PROCEDURE:

- When to issue and print FIs***
- 1.0 FI issuance should be coordinated with regularly scheduled WIC appointments whenever possible. Local program staff shall appropriately issue and print FIs for WIC participants for the following reasons:
- 1.1 Initial program enrollment for new WIC participants.
  - 1.2 Next set of FIs are due (should be issued at a nutrition education contact).
  - 1.3 Recertification of WIC participants.
  - 1.4 To replace FIs as allowed by ♦560.
    - 1.4.1 Replacement FIs are allowed in the following situations:
      - FIs damaged by participant;
      - FIs destroyed by fire or stolen (with police report);
      - Formula FIs lost (once per certification period);
      - Transfers to Oregon from another state;
      - Incorrect formula or food package (must bring in incorrect formula or FIs);
      - Change in guardianship (see ♦451);
      - FIs in a location that pose a threat to the individual (domestic violence).
- Printing FIs***
- 2.0 FIs will only be printed on the FI paper stock provided by the state WIC office (form 57-906). See ♦500 for information on how to order FI stock. Each sheet of FI stock includes three FIs and an FI stub.
- FI stub***
- 2.1 ***Each*** FI stub must be signed by the participant, parent, caretaker or proxy and detached before giving out the FIs. See ♦540 for information on proxies. FI stubs must be collected and retained for three years. See ♦530 for more information.

**FI ISSUANCE AND PRINTING, cont.**

- FI issuance* 3.0 Issue and print **three months** of FIs, unless there is a situation that warrants less than triple issuance (see ¶3.3 and ¶3.4). FIs may be issued to participants, parents, caretakers or proxies who provide appropriate documentation according to ♦610.
- Written procedure required* 3.1 Local programs are required to have a written procedure for FI issuance that addresses the following issues:
- When FIs are single or double issued;
  - How FI stubs are collected and filed (see ♦530 for more information).
- 3.1.1 If any local policy is more restrictive than state policy, the local policy must be approved by the state WIC program prior to implementation.
- Partial packages* 3.2 Issue a partial package for the current month if a participant, parent or caretaker is receiving FIs **on or after** the 20<sup>th</sup> of the month. Partial packages will carry the participant to the next month's issuance.
- Single issuance required* 3.3 In the following situations, single issuance of food instruments is **required**.
- RX or HP authorization needed (automatic single issuance in TWIST);
  - Eligibility pending (automatic single issuance in TWIST);
  - Missed nutrition education appointment (see ♦835 for more information and for exceptions to the single issuance requirement);
  - Missed mid-point health assessment for infants (see ♦646 for more information and for exceptions to the single issuance requirement);
  - Proxy is picking up the FIs;
  - Custody dispute;
  - Unresolved program integrity issue (program abuse, sanctions, overdue Lactina breastpump, etc.);
  - FIs being mailed to participant. See ♦506 for more information and for exceptions to the single issuance requirement.
- Single or double issuance optional* 3.4 Local program staff **may** single or double issue FIs on a case by case basis. Examples are listed below.

**FI ISSUANCE AND PRINTING, *cont.***

*(Single or double issuance optional)*

- Foster child;
- Lactina breastpump on loan;
- Instream migrant participant whose living situation is unstable;
- Homeless participant;
- High risk participant;
- Trial of new formula.

3.4.1 Consider using scheduled FI pickup appointments or scheduled walk-in times to accommodate single or double issuance.

*NE Refusal*

3.5 Refer to ♦835 for information on what to do when a participant refuses to attend nutrition education.

3.6 It is recommended that staff issue FIs in a way that maximizes FI issuance *without* negatively impacting nutrition education. For example, staff may issue fewer than three months of FIs if a participant or participant's family member is due for an appointment in less than three months. Staff may also issue fewer than three months of FIs in order to coordinate family appointments.

*Eligibility pending*

4.0 Refer to ♦610 for information on WIC participants who come in for a new enrollment or recertification appointment with eligibility pending due to missing proofs.

*Paper certification*

5.0 In situations when the TWIST system is down or where no computer system is available at the time of any certification visit, local program staff must complete the "*Certification Data Entry Document*" by hand (form 57-615). Refer to ♦641 for more information.

*Timeframe for data entry*

5.1 Local program staff have **two working days** to enter the data into the TWIST system in order to complete the certification and print FIs for the participant. Refer to ♦640 for more information.

*FI pickup or mailing*

5.1.1 Local program staff will either instruct the participant to pick up the FIs at the clinic site or mail the FIs as allowed by ♦506.

*Do not replace previous month's FIs*

6.0 In some situations, a participant may request to replace FIs from the previous month because of incorrect food or formula. This is *not* allowed. Refer to ♦560 for more information.

*Issuing FIs to a relative*

7.0 Local WIC program staff members *may not* issue and print FIs for themselves, their family members or other relatives. Refer to ♦611 for additional guidelines.

**FI ISSUANCE AND PRINTING, *cont.***

- FI disposition*** 8.0 The disposition of all FIs must be documented in TWIST. FIs that are voided, canceled, lost or stolen must be documented using the “Void Issued FIs” function in the “Food Instrument” module.
- Participant notification*** 9.0 Refer to ◆635 for guidance on what information to provide to participants or caretakers who are new to Oregon WIC, including how to shop using WIC FIs, the role of the second authorized signer, rights and responsibilities, etc. ★

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