

Determine what actions can happen over the phone, which WIC staff can do it, and what documentation will be required. Staff will need to determine if the caller is authorized to request these actions by requesting the appropriate security data from the caller. The security data in TWIST may include WIC ID number, child's name and DOB, cardholder DOB/zip, or other reasonable combination of data matched to what is found in TWIST.

Action	By phone?	Staff?	Security?	Documentation	Policy
Change appointments	Yes	All	Security Data from TWIST	FAR	
Change address and phone numbers for participants and first cardholder	Yes	All	Security Data from TWIST	Client Master Demographics	510
Change address for second cardholder	Yes	All	Security Data from TWIST	FCS	510
Report card lost, stolen, deactivated	Yes	All	Security Data from TWIST	FCS	510
Remove second cardholder	Yes	All	First cardholder DOB, ZIP	FCS	510
Change food package/benefits <ul style="list-style-type: none"> • Add foods to existing food package • mid-cert FP changes • Category changes (e.g. WP-WE) • Additional cans of formula • Infant to Child change 	Yes	CPA	Security Data from TWIST	FPA	769 660
Change form of milk, formula, or juice	Yes	All	Security Data from TWIST	FPA	660
Temporary Newborn	Yes	CPA	Security Data from TWIST	TNB screens	511 601 660 769
Transfers in from in-state	Yes	All	Security Data from TWIST	Transfers	654

Action	By phone?	Staff?	Security?	Documentation	Policy
Missed NE – issuing a month of benefits and rescheduling NE	Yes	All	Security Data from TWIST	FAR	830 835 860 511
Issuing benefits to participant when report completion of online NE	Yes	CPA or trained clerical- with discussion	Security Data from TWIST + CPA finds record of completion online	Document in Online Group or as NE topic in Participant’s record	823
Issuing benefits to participant by RD after phone high risk follow up	Yes	RD – after appt.	Security Data from TWIST	Document HR care plan – Issue from FSS	661 821 822
Issue or Replace eWIC cards	No			Inform of process (either ebtEDGE or in-person at clinic)	510
Custody changes	No				510
Transfer in from out-of-state	No				510
Add a new second cardholder	No				510