

Chapter 3: Client Processes

Section 5: Food Packages

Lesson: Changing Food Package Mid-Certification

Objectives:

Upon completion of this lesson the user will be able to:

- change a food package mid-certification.

Oregon Policies:

- ◆ 560 {New Policy Name}

Overview:

There are times during a certification period when you may need to change a participant's food package. This can happen by participant request, or when you find out that the participant needs different foods to meet their needs. In this lesson you will learn how to make those changes.

For a food package change that happens because of a *category change*, see Chapter 3, Lesson 806, *Category Change* (for example, pregnant woman delivers or changes in breastfeeding status).

Changing a Food Package:

No Benefits are Spent for the Current Month

♪ NOTE: On the *Food Package Assignment* screen, if there is NOT a "\$" in the status row for the current month, then no benefits have been spent.

☺ See Job "Modifying Food Packages".

The starting point for this lesson is:

Client Processes ⇒ Certification ⇒ Infant/Child or Woman ⇒ Food Package Assignment

1. **Click on the “Open” icon and retrieve the participant for whom you want to change the food package.**
2. **Click the drop down menu next to Module A and/or Module B to select new templates.**

FP Start Date	WIC Category	Module A	Qty A	Unit A	Module B	Module C	Qty C	Unit C	Med Doc	Partial	Status
12/01/2015	C1	MW-C	3.25	gal	C						
11/01/2015	C1	MW-C	3.25	gal	C						
10/01/2015	C1	MW-C	3.25	gal	C						
09/01/2015	C1	MW-C	3.25	gal	C						BI
08/01/2015	C1	MW-C	3.25	gal	C						BI
07/29/2015	IN7-12									<input checked="" type="checkbox"/>	U

Special Client
 IBN/WBN
 Twins or More

Figure 1: “Food Package Assignment” Screen.

3. **Click the “Forecast” button to forecast the new templates for the rest of the certification period.**

See Chapter 3, Lesson 500, *Assigning and Forecasting Food Packages* for more information.

4. **Save.**
5. **Go to the “Family Summary” screen to issue the new benefits.**

This screen is described in Chapter 3, Lesson 1100, *Family Summary Screen*.

Changing a Food Package: \$ Benefits are Spent for the Current Month

♪ NOTE: If benefits have been spent for the current month, changes must be made on the “Modify” screen. On the *Food Package Assignment* screen, look for the “\$” in the status row for the current month to show if benefits have been spent.

FP Start Date	WIC Category	Module A	Qty A	Unit A	Module B	Module C	Qty C	Unit C	Med Doc	Partial	Status
01/01/2016	C2-5	ML-C	3.25	gal	C						
12/01/2015	C2-5	ML-C	3.25	gal	C						
11/01/2015	C2-5	ML-C	3.25	gal	C						
10/01/2015	C2-5	ML-C	3.25	gal	C						BI
09/01/2015	C2-5	ML-C	3.25	gal	C						BI
08/10/2015	C2-5	ML-C	3.25	gal	C						\$ BI

ML-C Milk Lowfat, Cheese

Client has benefits spent for the current month.
Please use the Modify screen to make adjustments.

Modify FR and FX Med. Doc. Info Forecast Row Summary :Special Client :IBN/WBN Twins or More:

Food Package Assignment Old Food Package Assignment

Figure 2: Message about Spent Benefits

The starting point for this lesson is:

Client Processes ⇒ Certification ⇒ Infant/Child or Woman ⇒ Food Package Assignment

6. **Click on the “Open” icon and retrieve the participant for whom you want to change the food package.**
7. **Click the “Modify” button to change the food package for the current month.**

- To remove a food or formula, select the food from the list then select the smallest amount (0 or the amount already spent). TWIST will display the amount originally assigned, but will not let you reduce the amount below what was already spent.
- To add a food, click the “Insert Row” button and select the new food or formula.
- You can adjust the food quantity on the drop down.
- TWIST will adjust the maximum food amounts for spent benefits.
- For more information about using the “Modify” screen, see Chapter 3, Lesson 501, *Modifying Food Packages*.

8. **To forecast the change:**

- You cannot forecast from the current month because of spent benefits.
- If the new food package has a template, select the template for the **next** month and forecast from that month.
- If the new food package does not have a template, manually change all future months as needed.

 NOTE: See Chapter 3, Lesson 500, *Assigning and Forecasting Food Packages* and Chapter 3, Lesson 501, *Modifying Food Packages* for more information.

9. **Save.**

10. **Go to the “Family Summary Screen” to issue the benefits.**

This screen is described in Chapter 3, Lesson 1100, *Family Summary Screen*.

 **Notes:**