
Chapter 3: Client Processes

Section 5: Food Packages

Lesson: “Special” Formula and Medical Documentation

Objectives:

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

- assign formulas needing medical documentation
- document medical documentation forms appropriately

Oregon Policies:

- ◆ 760 Medical Formulas and Nutritionals
- ◆ 765 Medical Documentation
- ◆ 769 Assigning WIC Food Packages, Appendix C

Other Resources:

Staff Training: Food Package Module

Overview:

“Special” food packages are for women, infants and children who have a documented medical condition that requires the use of infant formula, medical formula or nutritionals. Some of these medical formulas can be delivered directly to the participant from a special vendor, the Formula Warehouse.

Instruction:

Assigning Formula to Women and Children

Women and children with medical documentation can be assigned formula (standard or medical) if they meet the criteria in *WIC Policy 769: WIC Food Packages*. If a child or woman requires formula, you must first flag them as “Special” on the “Food Package Assignment” screen.

The starting point for this lesson is:

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

1. Click on the “Open” icon and retrieve the woman or child for whom you want to assign formula.
2. Click the “Special Client” checkbox.
 - Module C will be activated.

The screenshot shows the 'Food Package Assignment' window with the following data table:

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	8.25	gal	C						
11/01/2015	C1	MW-C	8.25	gal	C						
10/01/2015	C1	MW-C	8.25	gal	C						
09/01/2015	C1	MW-C	8.25	gal	C						
08/03/2015	C1	MW-C	8.25	gal	C						

Below the table, the 'Special Client' checkbox is checked. Other options include 'IBN/WBN' (unchecked) and 'Twins or More' (unchecked). Buttons for 'Modify', 'FR and FX', 'Med. Doc. Info', 'Forecast', and 'Row Summary' are visible. The bottom navigation bar includes 'Enrollment', 'Family Summary Screen', 'Immunizations Status', 'Change Transaction Type', and 'Determine Eligibility'.

Figure 1: Module C Activated for Special Client

3. Click the template drop down arrow in Module C to select the formula.
 - The most commonly used formulas are listed in the drop down.
 - The full list of formulas is found by opening the “Modify” screen and using the “Insert Row” button to choose a formula.
4. Select the quantity of formula needed.

♫ NOTE: An “R” will appear in the “Med Doc” status to indicate that medical documentation is required for this formula.

5. If this formula will be assigned for the future, forecast the formula into future months.
6. Enter the Medical Documentation
 - See “Medical Documentation” later in this lesson.

7. Save.

♪ NOTE: You must go to the “Family Summary” screen to issue the benefits. This screen is described in Chapter 3, Lesson 1100, *Family Summary Screen*.

♪ NOTE: If the formula will be ordered through the Formula Warehouse, follow the instructions in Chapter 3, Lesson 505, *Formula Warehouse*.

Assigning Medical Formula to Infants

In WIC, medical formulas refers to any formula that is not the milk-based or soy-based bid formula and requires a medical documentation form to be completed. Infants with medical documentation can be assigned a special medical formula if they meet the criteria in *WIC Policy 769: WIC Food Packages*. WIC policy allows one month of special medical formula to be issued before the medical documentation is entered into TWIST.

♪ NOTE: Non-breastfeeding infants (IN) who are 7-12 months old, can receive additional formula if they are unable to eat food. The “Special Client” checkbox is NOT used for breastfeeding infants or infants younger than 7 months.

The starting point for this lesson is:

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

8. Click on the “Open” icon and retrieve the infant for whom you want to assign medical formula.

9. Click the template drop down arrow in Module A to select the new formula.

- The most commonly used formulas are listed in the drop down.
- The full list of formulas is found by opening the “Modify” screen and using “Insert Row” to choose a formula.

10. Select the quantity of formula needed.

♪ NOTE: An “R” will appear in the “Med Doc” status to indicate that medical documentation is required for this formula.

11. **If this formula will be assigned for the future, forecast the formula into future months.**
12. **Enter the Medical Documentation**
 - See “Medical Documentation” later in this lesson.
13. **Save.**

♪ NOTE: You must go to the “Family Summary” screen to issue the benefits. This screen is described in Chapter 3, Lesson 1100, *Family Summary Screen*.

♪ NOTE: If the formula will be ordered through the Formula Warehouse follow the instructions in Chapter 3, Lesson 505, *Formula Warehouse*.

Med Doc Status

A Medical Documentation (Med Doc) form from the participant’s health care provider is required to issue certain food packages. For example, certain medical formulas for women and children require medical documentation before they may be issued. The information on this form will be documented in the “Medical Documentation” pop-up. For more information on which food packages require medical documentation refer to the *Food Package* staff training module and *Oregon WIC Policies 760, 765 and 769*.

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	PED-R	113	btl	R		
11/01/2015	C1	MW-C	3.25	gal	C	PED-R	113	btl	R		
10/01/2015	C1	MW-C	3.25	gal	C	PED-R	113	btl	R		
09/01/2015	C1	MW-C	3.25	gal	C	PED-R	113	btl	Y		
08/03/2015	C1	MW-C	3.25	gal	C	PED-R	113	btl	Y		

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

Food Package Assignment Old Food Package Assignment

Enrollment Family Summary Screen Immunizations Status Change Transaction Type Determine Eligibility

Figure 2: “Food Package Assignment” Showing Med Doc Status

“Med Doc” Status:

R: Required.

- Medical Documentation is required for this food package.
- Medical Documentation has not been entered.
- Food package issuance limited to one month.

Y: Yes.

- Medical Documentation is required for this food package.
- Medical Documentation is complete.
- Food package can be issued for months indicated with “Y”.

Entering Medical Documentation

The starting point for this lesson is:

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

- 1. Retrieve the participant for whom you want to enter Medical Documentation**
- 2. Select the row for the first month of the food package which requires Medical Documentation.**

3. **Click the “Med Doc Info” button.**
 - The “Medical Formulas” section displays the medical formula from the row selected on the “Food Package Assignment” screen.

FP110S - Medical Documentation

Medical Documentation

Start Date	End Date	Provider's Name	Notes
08/01/2015	09/30/2015	Dr. Who	

Medical Formulas

Formula Name	Received
PediaSure	<input checked="" type="checkbox"/>

Supplemental Foods

Issue Full Provision of Supplemental Food

No Supplemental Foods

Issue Full Provision of Supplemental Foods Except

Exclusions

Milk Cheese

Eggs Peanut Butter

OK Cancel

Figure 3: “Medical Documentation” Pop-Up

4. **Enter the start date and end date for use of this formula indicated on the medical documentation form.**
5. **Enter the health care provider’s name.**
6. **Click in the notes field to enter a note, if needed.**
7. **Click the received box next to the formula if it matches the documentation from the health care provider.**

8. **If the health care provider has excluded foods, enter the information in “Supplemental Foods.”**
 - This documents the Health Care Provider’s instructions, but will not prevent issuing food.
 - It is recommended to document the excluded foods in Progress Notes.
9. **Click “OK” to save the information and return to the “Food Package Assignment” screen.**

When the “Med Doc Info” is complete, the “Med Doc” status field on the “Food Package Assignment” screen will change to “Y” for the date range entered.
10. **Make any necessary adjustments to the food package based on the health care provider’s instructions (e.g. food exclusions).**
11. **Save.**

♪ NOTE: If two medical formulas share the same date range, then the Medical Documentation section will have only one line and both formulas will appear in the “Medical Formulas” section.

Tips and Shortcuts:

You cannot designate a WBN or IBN as “special.” You must first change their category to WB/IB or WN/IN, whichever is most appropriate.

Notes:

