

Chapter 3: Client Processes

Section 5: Food Packages

Lesson: Formula Replacement (FR) and Formula Exchange (FX)

Objectives:

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

- Process formula returned to the clinic;
- Issue new formula to replace the returned formula; and
- Issue new formula when formula has been spent but no cans are returned.

Oregon Policies:

- ◆ 511 Food Benefit Issuance
- ◆ 561 Program Integrity – Replacing Benefits
- ◆ 735 Handling of Returned Formula

Other Resources:

Staff Training: Food Package Module

Overview:

The “Formula Replacement and Formula Exchange” screen is used when the client has already spent formula benefits for the current month and needs to replace the spent formula.

Instruction:

Formula Exchange

Formula exchange is used when:

- participants have spent part or all of their current month of formula benefits,
- **they are returning unopened cans of formula to the clinic,** and
- WIC will re-issue benefits for a different formula.

The starting point for this lesson is:

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

1. Retrieve the participant for whom you wish to exchange formula.
2. Place the row indicator on the current month and click the “FR and FX” button to open the “Formula Exchange/Replacement” pop-up.

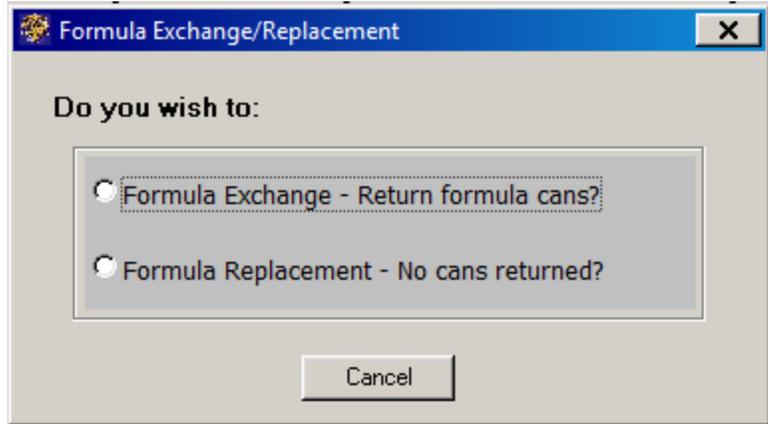


Figure 1: “Formula Exchange/Replacement” Pop-Up

3. Select “Formula Exchange.”

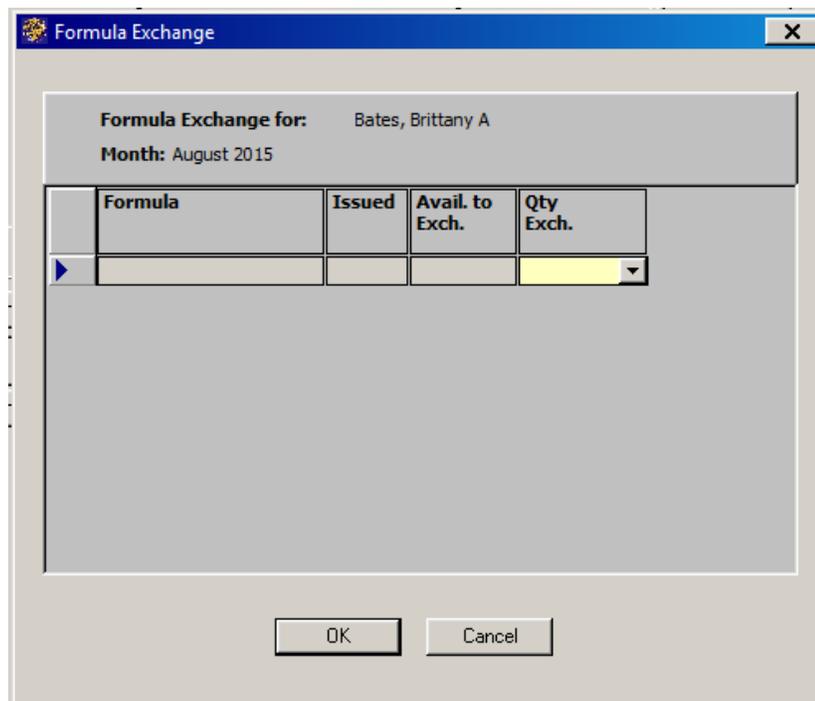


Figure 2: Formula Exchange Pop-Up

4. **Enter the quantity of formula the participant is returning to the clinic and click “OK.”**
5. **If all the spent formula has been returned, on the “Food Package Assignment” screen use the drop down in Module A to assign the new formula.**
6. **If only some of the spent formula has been returned, use the “Modify” screen to assign the new formula.**
 - Click the “Modify” button to open the “Modify” pop-up.
 - Adjust the quantity of the old formula to the lowest number (the amount spent and not returned).
 - Use “Insert Row” to add the new formula.
 - If the quantity of the old formula is reduced, TWIST automatically assigns the amount of the new formula.
 - Click “OK.”
7. **Using the row for next month, assign and forecast the new formula for future months.** (See Chapter 3, Lesson 500, *Assigning and Forecasting Food Packages*).
8. **Save.**
9. **Go to the “Family Summary Screen” to issue the benefits.**

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

Formula Replacement

Formula replacement is used when:

- participants have spent all or part of their current month of formula benefits,
- **they do not have cans of formula to return,** and
- WIC policy will allow the replacement of the cans of formula (e.g. domestic violence, police report of stolen formula).

The starting point for this lesson is:

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

1. Retrieve the participant for whom you wish to replace formula.
2. Place the row indicator on the current month and click the “FR and FX” button to open the “Formula Exchange/Replacement” pop-up.
3. Select “Formula Replacement.”

| Formula | Issued | Avail. for Rep. | Qty Rep. | Reason |
|---------|--------|-----------------|----------|--------|
| | | | | |

Figure 3: Formula Replacement Pop-Up

4. Enter the quantity of formula the clinic will replace.
5. Select the reason the formula is being replaced and click “OK.”
5. If all the spent formula will be replaced, on the “Food Package Assignment” screen, use the drop down in Module A to assign the new formula.
6. If only some of the spent formula will be replaced, use the “Modify” screen to assign the new formula.

- Click the “Modify” button to open the “Modify” pop-up.
 - Adjust the quantity of the old formula to the lowest number (the amount spent and not replaced).
 - Use “Insert Row” to add the new formula and adjust the amount if necessary.
 - If the quantity of the old formula is reduced, TWIST automatically assigns the amount of the new formula.
 - Click “OK.”
8. **Save.**
9. **Go to the “Family Summary Screen” to issue the benefits.**
- This screen is described in Chapter 3, Lesson 1100, *Family Summary Screen*.
10. Complete Form 57-912 *Replacement of Unavailable/Stolen Formula*, have the cardholder sign it, and send it to the State WIC office within 3 days. See Policy 561 for more information.

Tips and Shortcuts:

Notes:

