

Chapter 3: Client Processes

Section 5: Food Packages

Lesson: Formula Warehouse

Objectives:

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

- order formula through the Formula Warehouse.

Oregon Policies:

- ◆ 561 Program Integrity: Replacement of Food Benefits
- ◆ 760 Medical Formulas and Medical Foods
- ◆ 765 Medical Documentation
- ◆ 769 Assigning WIC Food Packages, Appendix C

Other Resources:

Staff Training: Food Package Module

Overview:

Some women, infants and children have a documented medical condition that requires the use of medical formula or nutritionals. Some medical formulas are hard to find at local stores so Oregon WIC has a special vendor which can deliver certain medical formulas to families across the state each month. This vendor is called the Formula Warehouse (FW) and its orders are processed by TWIST.

Instruction:

Placing a Formula Warehouse Order

☺ See Job Aid “Medical Formulas and Nutritionals” for which formulas are available from the Formula Warehouse.

Before using this process, please review

- Chapter 3, Lesson 500, *Assigning and Forecasting Food Packages*
- Chapter 3, Lesson 501, *Modifying Food Packages*
- Chapter 3, Lesson 1100, *Family Summary Screen*

The starting point for this lesson is:

Client Processes ⇒ Certification ⇒ Woman or Infant/Child ⇒ Family Summary Screen

♪ **NOTE:** The family must have an active eWIC card before ordering from the Formula Warehouse.

- 1. Click on the “Open” icon and retrieve the woman or child for whom you want to order from the Formula Warehouse.**
- 2. On the Family Summary Screen, verify the medical formula benefits have been issued.**
 - If the medical formula has not been assigned and issued, return to the Food Package Assignment screen to assign the benefits, and issue the benefits on the Family Summary screen.
 - If the client only wants the formula from the Formula Warehouse for one month, only assign the formula on the FPA for one month.
- 3. Click the “Formula Warehouse” button in the upper right corner of the “Family Summary” screen.**
 - The “Formula Warehouse” pop-up will open.

Month	Address	Phone	Formula Details	Qty
March				113.00
February				113.00
January				113.00

Figure 1: Formula Warehouse Pop-Up

4. In the “Address” field, use the drop down arrow to select the address where the formula will be shipped for each month.

♫ **NOTE:** The client should select a secure address to receive the formula shipment each month.

- HOME: Client’s home address.
- CLINIC: If the client cannot receive the formula at their home address, the formula can be mailed to the clinic for the client to pick up.
- OTHER: The client may choose to have the formula shipped to a different address. After selecting “Other,” click the  button next to the drop down arrow to enter the address.

5. In the “Phone” field, select the client’s preferred phone number. This number may be used if the shipping company has questions.

6. In the “Formula” field, use the drop down arrow to select the formula details.

- If more than one variety of the formula is available, select the correct variety (for example, different flavors or fiber)
- To select more than one variety for each month, use the “Insert” button to insert a new row for each month, then enter the correct quantity of each variety.

Formula Warehouse Order Form

Formula Warehouse Order Form

Ship to Name: Child1 Miso DOB: 02/02/2012

Month	Address	Phone	Formula Details	Qty
March	HOME: 123 FamilyNet St, BEND, OR 97702	541-706-1541	PediaSure - Institutional Chocolate 8oz RTF	113.00
February	HOME: 123 FamilyNet St, BEND, OR 97702	541-706-1541	PediaSure - Institutional Chocolate 8oz RTF	113.00
▶ January	HOME: 123 FamilyNet St, BEND, OR 97702	541-706-1541	PediaSure - Institutional Chocolate 8oz RTF	113.00

PediaSure - Institutional Chocolate 8oz RTF
 PediaSure Institutional strawberry 8 oz RTF

Notes

Insert Save / Send Cancel

Figure 2: Choosing Formula Variety

7. **To enter “Notes” for the Formula Warehouse staff, double click on the “Notes” field.**
 - These notes are read by the Formula Warehouse staff to help with processing and mailing the order (e.g. “Do not leave package on porch”).
 - Notes for WIC clinic staff should be entered on the “WIC Notes” screen.

8. **Click “Send/Save” to send the order to the Formula Warehouse.**

Changing a Formula Warehouse Order - No Formula Returned to the Clinic

♫ **NOTE:** Use Formula Replacement when FW formula has been shipped, but is not available to be exchanged. This must meet the criteria in Policy 561 – stolen, fire, natural disaster, domestic violence, or custody change. See Chapter 3, Lesson 504, Formula Exchange and Formula Replacement. Formula Replacement will automatically generate a new FW order.

Use this process when:

- The type of formula changes (and the current order hasn’t shipped yet).
- The amount of formula prescribed increases.
- It is not a Formula Replacement or Formula Exchange.

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 change the order from the Formula Warehouse.**

2. **On the Food Package Assignment screen, change the formula assignment and enter the medical documentation.**
 - If needed, use the Modify screen to make changes.

3. **Save.**

4. Click on the “Family Summary Screen” button.
5. On the Family Summary screen, click “Issue Benefits.”
6. Click the “Formula Warehouse” button to open the Formula Warehouse pop-up.
7. Enter the new address and formula information (see lesson above for instructions).
 - If you are adding more formula after formula has shipped for the month, enter the information in the extra blank row.
8. Click “Send/Save” to send the new order to the Formula Warehouse.

Changing a Formula Warehouse Order - Formula Warehouse Formula Returned to the Clinic

♪ **NOTE:** Medical formulas cannot be returned to the Formula Warehouse and must be returned to the local agency. If a client brings FW formula back to your clinic, use Formula Exchange to replace it. Formula exchange can be used to replace the same type of formula or to issue a new one.

The starting point for this lesson is:

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

9. Click on the “Open” icon and retrieve the woman or child for whom you want to change the order from the Formula Warehouse.
10. On the Food Package Assignment screen, use Formula Exchange (FX) to process the returned formula.

See Chapter 3, Lesson 504, *Formula Exchange and Formula Replacement*.
11. As needed, change the medical formula on the FPA and enter the medical documentation.
 - The formula can either be new or the same formula.
 - If needed, use the Modify screen to make changes.

- 12. Save.**
- 13. Click on the “Family Summary Screen” button.**
- 14. On the Family Summary screen, click “Issue Benefits.”**
- 15. Click the “Formula Warehouse” button to open the Formula Warehouse pop-up.**
- 16. Enter the new address and formula information (see lesson above for instructions).**
 - The old formula is displayed on greyed out rows for the current month.
 - Enter the new formula warehouse order in the new blank rows.
- 17. Click “Send/Save” to send the new order to the Formula Warehouse.**

When a Formula Warehouse Order Fails

Formula Warehouse orders are sent at the end of every day. At the time TWIST gathers and sends the order, a check is done to see if all the required information is available. There are three reasons why a Formula Warehouse order might fail:

1. There is no active cardholder and card assigned to the account;
2. No formula warehouse eligible benefits have been issued; and,
3. There is inadequate balance on the account to fill the order.

A failure report is produced daily, and the reviewing state staff person will contact the local agency involved. The local agency staff can then resolve whatever issue there is with the order.

The most common reason there is inadequate balance on the account would be because the cardholder purchased some of the formula before the order was submitted at the end of the day. If that is the case, the order can be resubmitted for the remaining balance if needed.

- 1. Open the Formula Warehouse screen from the Family Summary Screen.**
- 2. Click Save/Send and an error pop-up about inadequate balance will tell you the available balance amount.**
- 3. Change the quantity to the available balance.**
- 4. Click Save/Send.**

Running the Formula Warehouse Order Report

To run this report:

Food Instruments ⇒ Outputs ⇒ Food Packages ⇒ Participant Formula Warehouse Orders

1. Enter a date range and click Run.

- Clinic can be selected if needed.

2. Review the information on the report.

- Name, WIC ID, and DOB: The name, ID number and date of birth of the participant for which the order was placed.
- Month: Gives the date the order is being sent to the Formula Warehouse.
- Order Status: Will indicate either “Waiting” or “Ordered.”
 - Waiting means the order is in the future or failed.
 - Ordered means it has gone to the Formula Warehouse but does not indicate if it has been filled or not.
- Formula: What has been ordered.
- Quantity (cans): How much was ordered.
- Order Created: The staff ID and date of the original order.
- Special instructions: Indicates if a note was included on the Formula Warehouse order in TWIST.

3. Click Print if a hard copy is needed.

✂ Tips and Shortcuts:

After a Formula Warehouse order is placed:

- On the *Family Summary* screen, a red exclamation point will display on the “Formula Warehouse” button.
- On the *Food Package Assignment* screen, the status code “FW” is displayed for each month of the order.

📝 Notes:

🎵 **NOTE:** Changes to Formula Warehouse orders can be made at any time, but making changes before the order is shipped saves the program time and money.

This page intentionally left blank.