

**Oregon eWIC**



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## **eWIC Webinar 9: Formula Warehouse**

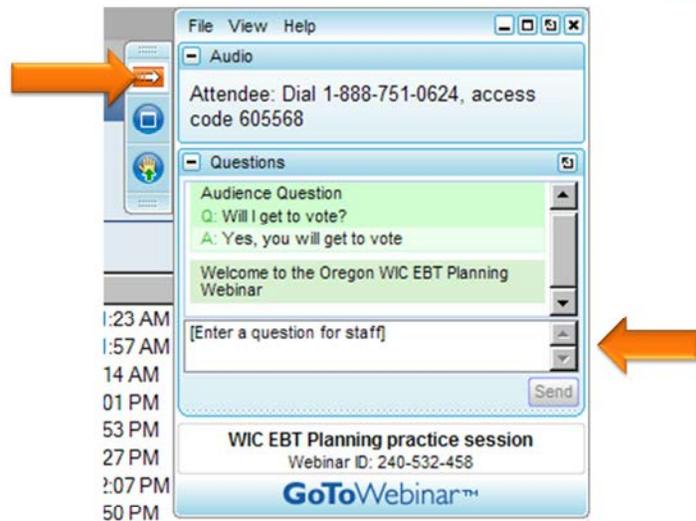
December 11, 2013 at 9:30

Log into the webinar using the link sent with registration.

**Oregon Health Authority**

Good morning! In a few minutes we will begin recording this webinar. The slides for this presentation will be posted on the Oregon WIC website under Resources for Oregon WIC Staff and eWIC. We are scheduled to take about an hour for this webinar. Before we begin, I would like to cover a few logistics.

## How to use "Go To Meeting"



On the right hand side of the screen you will see the webinar navigation bar. The red arrow will minimize the bar if it is in your way. The question portion will allow you to type in questions for the organizers. We will be monitoring that information and responding in the same section when possible.

## Guidelines for Webinars

- If you have technical difficulties, please call 971-673-0040 or type a request in the question area.
- Because this webinar is being recorded, participants will be muted.
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If you have problems during the webinar, please call the number indicated on the screen or type in a request and someone will provide assistance. This webinar will be recorded and posted on our Oregon WIC website for access in the future as needed. Due to recording, all webinar participants will be muted to maintain the quality of the recording. In today's presentation we will be showing several screen shots of TWIST and the formula warehouse ordering process. If you have questions that come to mind as you are viewing the slides, feel free to write them down or type them in as we go along. I will have time at the end of the presentation to answer any questions you might have. So let's get started!

**(Press Start Recording Button!)**

**Oregon eWIC**



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## Formula Warehouse

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 Oregon Health Authority

Hello WIC Colleagues! Welcome to the ninth in our Webinar series on preparing for eWIC implementation. My name is Cheryl Alto and I am a nutrition consultant at the state WIC office. I will be your presenter for this program on how TWIST will assist you in ordering medical formulas from the Formula Warehouse. It is my pleasure to discuss this exciting eWIC feature with you!

## During this webinar, we will...

- Describe changes to the Formula Warehouse (FW) ordering process
- Understand how FW orders are integrated into TWIST
- Identify changes to clinic operations
- Identify planning and communication needs during eWIC conversion

In this presentation today, I will outline the ordering process for the formula warehouse, provide an explanation of how formula warehouse orders will be integrated into TWIST, discuss the impact these changes may have on clinic operations and identify possible issues to consider when communicating these changes with your staff and with families to ensure a smooth and successful conversion.

Integrating formula warehouse orders into TWIST is a big change that comes with eWIC implementation. This integration will impact clinic flow and staff responsibilities. Additional information and clinic flow considerations for formula warehouse orders are available in Section 2 of the Clinic eWIC Readiness Toolkit.

Specific details of TWIST functionality will be covered in face-to-face training right before roll out. As with all of our webinars, the monthly local agency conference calls and your nutrition consultant are additional resources if you would like to brainstorm specific issues that might be unique to your clinic.

## Formula Warehouse



You might have noticed that I am using the term “Formula Warehouse” in place of talking about Providence or Providence Home Medical Equipment. So, if you have no idea what I am talking about, that is OK. Let’s walk through this change in terminology together.

## Formula Warehouse = Providence Home Medical Equipment



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Formula Warehouse is a generic term we are adding to TWIST to describe the system by which medical formulas can be ordered from a specialized medical formula vendor and be delivered directly to the participant's home.

The generic use of the term formula warehouse in TWIST will allow us to contract with any formula vendor that can fulfill our special formula orders if we need to change vendors in the future.

Our current vendor for formula warehouse orders is Providence Home Medical Equipment. Providence will continue to be our formula warehouse vendor providing home delivery of medical formulas for WIC participants across the entire state.

Formula  
Warehouse orders

## What is staying the same?

- Medical documentation
- Same formulas
- Same delivery



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Now that we know that Providence will remain our formula warehouse vendor for medical formulas, let's take a look at what else is staying the same.

The formulas available from the formula warehouse will still need medical documentation for issuance.

The selection of formulas available from Providence will remain the same

The need for gathering specific information about the medical formula such as flavor, fiber, form, will remain the same.

And the need for current, correct addresses will remain the same to ensure the correct delivery of the formula to the WIC participant.

Formula Warehouse  
Orders

## What is changing?

Good News!

Orders will be integrated into  
TWIST

- no forms to mail
- no vouchers to sign
- no vouchers to hold onto



If our webinar today could have sound tracks included, this is when I would cue the applause. The reason for the applause? Well, the Formula Warehouse function is one that you are going to love. It will mean the end to the mountain of paperwork required to process and keep track of the orders.

Ordering medical formulas from the Formula Warehouse will become much easier with eWIC. TWIST will connect directly with Providence, so you will no longer have to fax or mail Providence order forms. You won't have to remember to have the vouchers signed, and there won't be any vouchers to hold onto or keep track of.

Oregon eWIC

Formula Warehouse Orders

## What is changing?



- Formula selection in TWIST is more specific
- More flexibility in formula trials
- Timing of the delivery
- Shipping information for FW orders will reflect the current address in TWIST

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TWIST will assist WIC staff in selecting the correct formula-right down to the specifics of flavor, fiber and form.

Once you complete the issuance process, TWIST will handle sending the order to Providence

With eWIC implementation there will be more flexibility in how much formula is ordered. The benefit issuance will allow for more flexibility in trialing a new formula-the CPA can assign a few cans or the maximum allowed.

There will be changes to when the delivery is received. Moving into an eWIC environment will shift the timing of the monthly deliveries from the 1<sup>st</sup> few days of the month to the first five to seven days of the month.

Shipping information for formula warehouse orders will be captured in TWIST.

## Clinic Flow Planning



As you move forward in planning for eWIC implementation, considerations for your clinic in planning for formula warehouse orders might include:

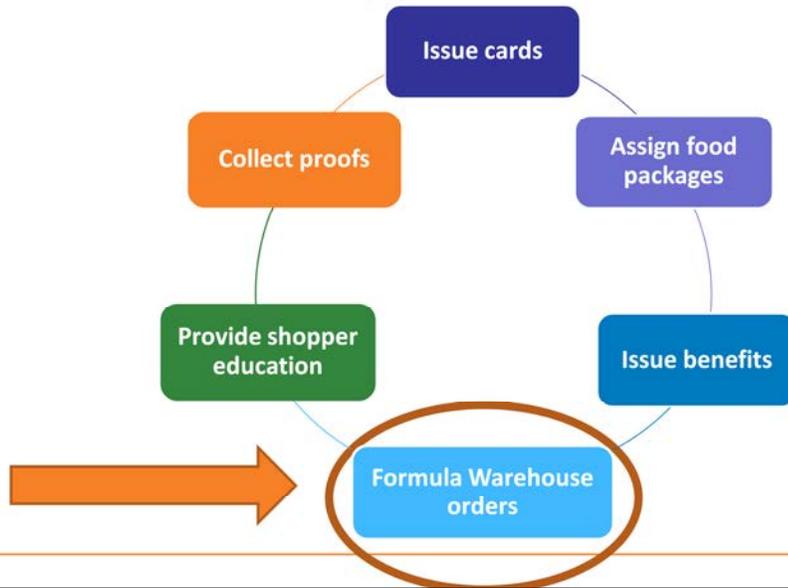
What all needs to be considered when converting the participant needing formula from Providence?

Who in your clinic will issue the formula warehouse benefits?

When is the best time to schedule the conversion appointment for families receiving Providence orders?

How you will track which families have been getting formula from Providence in order to schedule them appropriately?

## eWIC supports FW orders

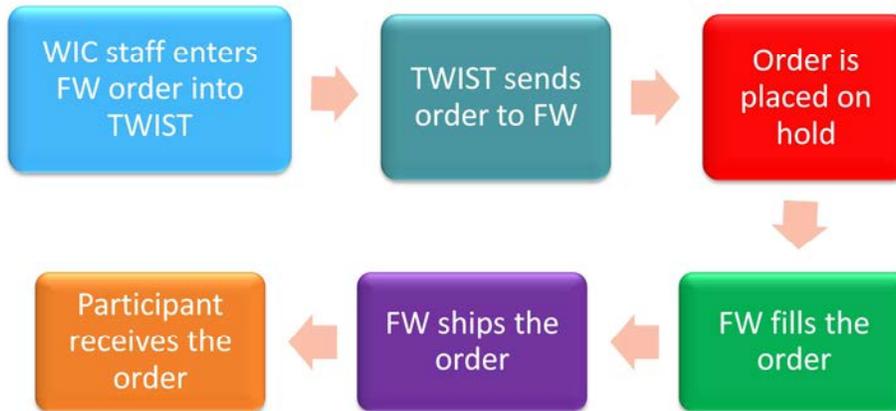


This slide identifies the 6 areas of clinic flow that will change with eWIC. You can see where the formula warehouse orders fit into the process.

Requests for special formulas that need to be ordered from Providence will be completely integrated into TWIST.

Before we take a look at what happens in TWIST to place a formula warehouse order, let's step back and take a look at the bigger picture of the ordering process-what happens in the clinic and what happens at the formula warehouse.

## Formula Warehouse Ordering Process



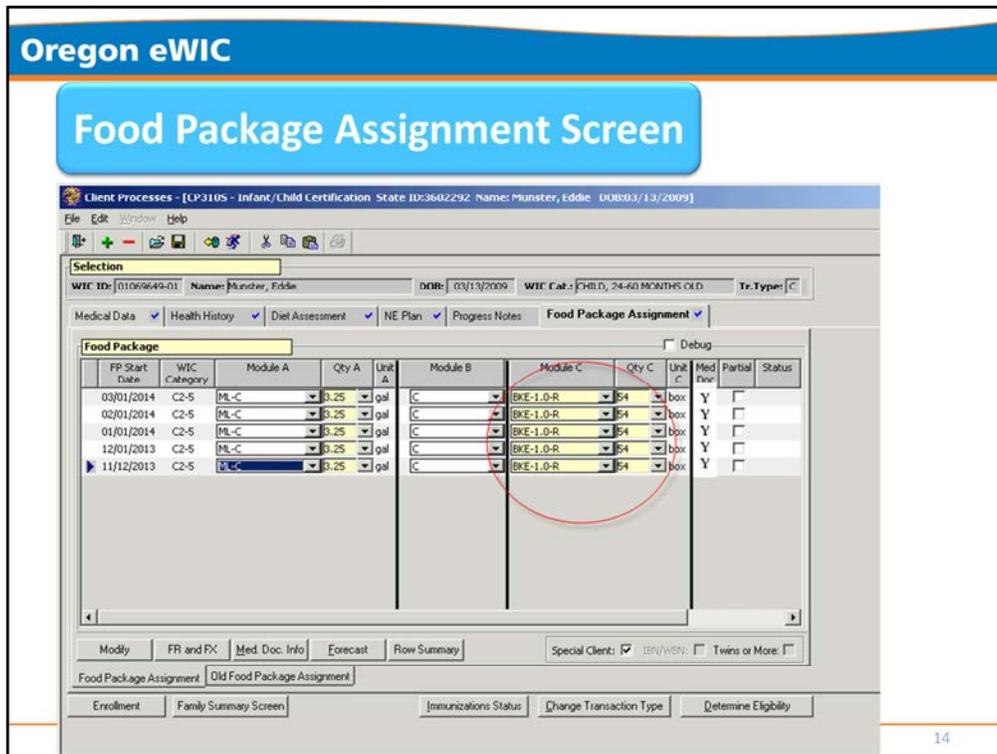
The formula warehouse ordering process starts in the clinic by the WIC staff entering the formula information into TWIST

The second and third step happen together: The order is sent electronically to Providence and a hold is placed on the order by JP Morgan.

The fourth step in the ordering process is when Providence processes the order and prepares it for shipment.

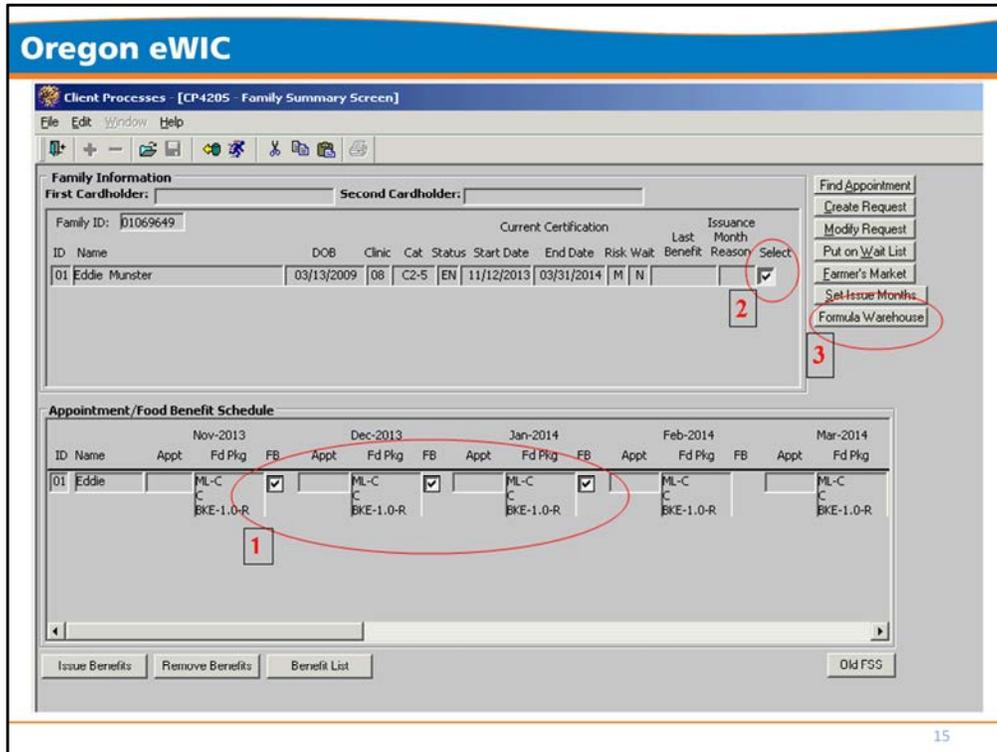
The 5<sup>th</sup> step in the ordering process is when the order is shipped.

the last step- the participant receives the order.



Let's look more closely at the first step in the formula warehouse ordering process: what happens in TWIST.

This is a screen shot of the food package assignment screen. The red circle indicates Module C where all formulas for children and women will be assigned. Like now, the CPA will assign the formula and enter the medical documentation information.



This screen shot is of the Family Summary Screen.

In looking at the red numbers and the circles notice the steps to go through for placing a formula warehouse order.

Step one....Select the months for which you would like to queue an order.

Step two...Select the client.

Step three....Click the formula warehouse button.

## Formula Warehouse Screen

Formula Warehouse Order Form

Formula Warehouse Order Form

Ship to Name: Eddie Munster

Month	Address	Formula Details	Qty
January			54.00
December			54.00
November			54.00

HOME: 777 CEMETERY Cir, BORING, OR 97009  
MAIL: 1313 MOCKINGBIRD Ln, TRANSYLVANIA, LA 71286

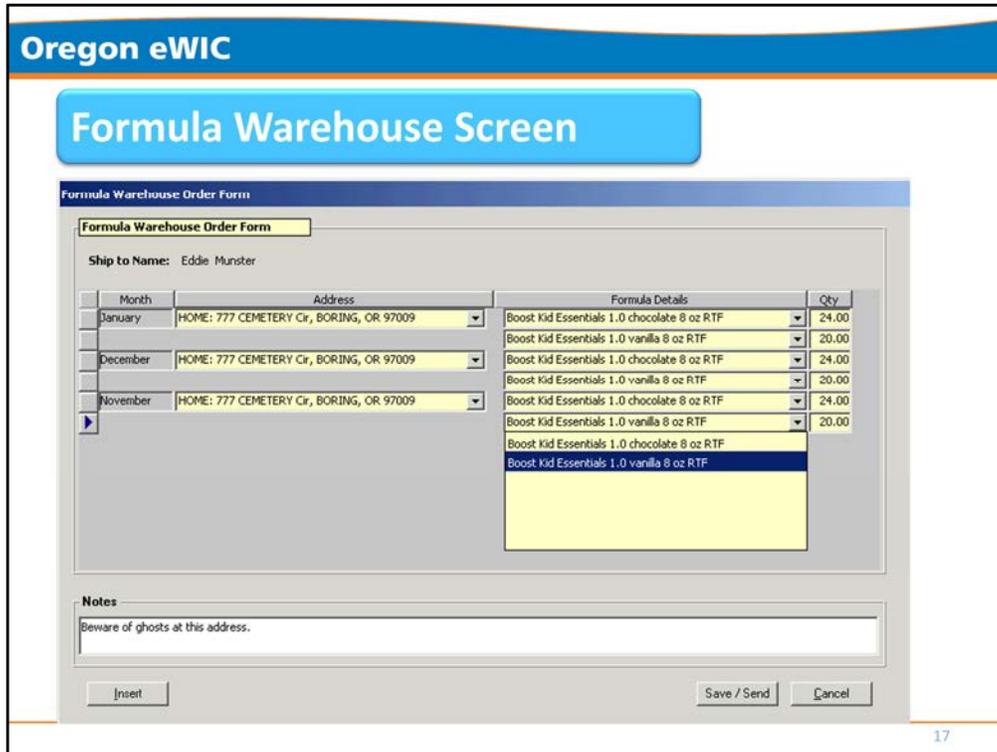
CLINIC: CANBY, CLACKAMAS CO. COMMUNITY HEALTH, 999 LIBRARY CT, OREG  
CLINIC: GLADSTONE, CLACKAMAS CO. COMMUNITY HEALTH, 999 LIBRARY CT, C  
CLINIC: Happy Valley, CLACKAMAS CO. COMMUNITY HEALTH, 999 LIBRARY CT, i

Notes

Insert Save / Send Cancel

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By clicking the formula warehouse button on the Family Summary Screen, a new screen opens up. On this screen, you will select an address for shipment from a drop down list that will include participant addresses and your agency clinic addresses. The home address for the participant pulls from the client master data in TWIST.

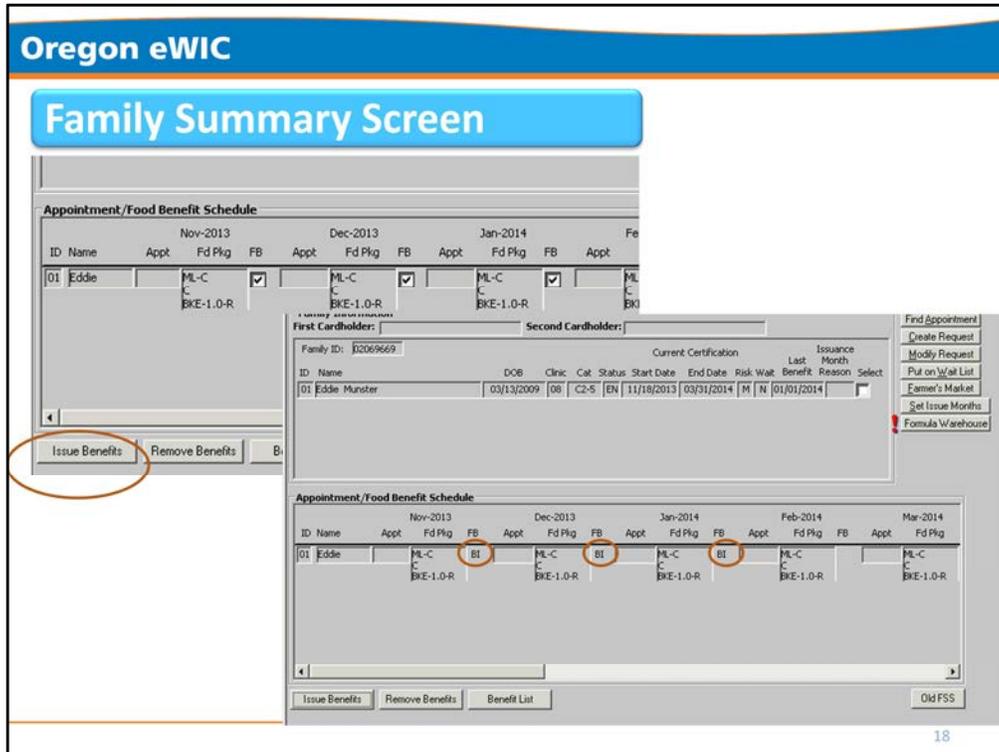


Once the address has been selected for each month, it is time to select the specific variety of the formula. TWIST will show you all the formulas available from Providence, including specific flavors or fiber content. If the health care provider has specified this information, it will be on the medical documentation form and that form will need to be accessible to the person selecting the medical formula to ensure the correct formula is selected for the participant.

Completing the Formula Warehouse screen will be a key step to ensuring participants get what they need, when they need it.

Current months orders, in this case-November will be placed in the queue and will be sent to Providence electronically as part of the End-of Day function in TWIST.

Future months orders, in this case- December and January orders- will be held and sent electronically with the end of month process.



This slide brings us back to family summary screen.

When the issue benefits button is clicked, the benefit information is sent to JP Morgan just like other benefits, with one exception. At the end of the clinic day, a hold is placed on the formula you want sent from Providence and those benefits will not be available to be purchased anywhere else.

Notice the benefit issued indicators next to each month-as indicated by the letters BI. This indicates that you were successful in issuing these benefits for the months indicated.

On the upper right hand side of the slide you will notice a exclamation mark next to formula warehouse button. This will be the indicator that the benefits were issued to the formula warehouse.

## How FW orders look on the WIC Benefits List

WIC Benefits List			
Benefits Available as of 11/18/2013 14:45			
<b>WIC Family ID: 2069669</b>			
FirstCardholder: No Cardholder		SecondCardholder:	
Benefits for: 11/1/2013 through 11/30/2013			
Family Member/s: Munster,Eddie - C2-5			
Quantity	Unit	Food Item Description	Warehouse
1	LB	Cheese	
1	DOZ	Eggs - large	
36	OZ	Cereal - hot / cold	
1	CTR	Peanut butter / dry beans / peas / lentils	
32	OZ	100% Whole wheat bread/corn tortillas/brown rice	
6	\$\$\$	Fruit and vegetables - fresh / frozen	
54	BOX	Boost Kid Essentials 1.0 ready to feed	Y
3.25	GAL	Lowfat or fat free milk	
2	CTR	64oz bottle / 16oz frozen juice	

This slide provides an example of how the formula warehouse orders will look on the benefits list. Along with cheese, eggs, cereal, and the other WIC foods, there is the medical formula, Boost Kid Essentials. There will be an indicator on the food benefit list that will let you know the formula will be sent by the formula warehouse.

# The FPA after order and issuance

Client Processes - [LP3105 - Infant/Child Certification State ID:3615365 Name: Munster, Eddie DOB:03/13/2009]

WIC ID: 02069669-01 Name: Munster, Eddie DOB: 03/13/2009 WIC Cat.: CHILD, 24-60 MONTHS OLD Tr.Type: C

Medical Data Health History Diet Assessment NE Plan Progress Notes Food Package Assignment

PP Start Date	WIC Category	Module A	Qty A	Unit A	Module B	Module C	Qty C	Unit C	Med Doc	Partial	Status
03/01/2014	C2-5	ML-C	3.25	gal	C	BKE-1.0-R	54	box	R	<input type="checkbox"/>	
02/01/2014	C2-5	ML-C	3.25	gal	C	BKE-1.0-R	54	box	R	<input type="checkbox"/>	
01/01/2014	C2-5	ML-C	3.25	gal	C	BKE-1.0-R	54	box	R	<input type="checkbox"/>	BI FW
12/01/2013	C2-5	ML-C	3.25	gal	C	BKE-1.0-R	54	box	R	<input type="checkbox"/>	BI FW
11/10/2013	C2-5	ML-C	3.25	gal	C	BKE-1.0-R	54	box	R	<input type="checkbox"/>	BI FW

Buttons: Modify, FR and FX, Med. Doc. Info, Forecast, Row Summary, Special Client:  BI/FW  Twins or More

Bottom Bar: Enrollment, Family Summary Screen, Immunizations Status, Change Transaction Type, Determine Eligibility

Once the formula warehouse order has been entered into TWIST, this screen shot shows what the food package assignment screen will look like. In the status column, you will be able to see both BI for benefits issued and FW for Formula Warehouse. By viewing this screen you will be able to see that Nov, Dec, and Jan have both Benefits issued and a formula warehouse order has been placed.

## Formula Warehouse fills the order



The formula warehouse order information gets sent electronically by TWIST to Providence. The information sent will include the product information, the participant's card information and a special code to release the hold and allow Providence to be paid by JP Morgan.

Order is shipped



TWIST will help you know when the order has been shipped and that it is on it's way to the participant.

Participant receives the order



The last step in the ordering process is the successful delivery of the product to the WIC participant. Just like now, if there is a problem with the order, the family is to call their local WIC office and the WIC staff will communicate the issue with Providence.

As you can infer from it's name, Providence Home Medical Equipment handles and ships so much more than WIC medical formula. The communication process is much easier and consistent when WIC staff, not WIC families, contact Providence.

## Considerations for Conversion



So, now that we have discussed the steps of the formula warehouse ordering process, let's turn our attention to planning before and after the conversion process.

## Timing of the delivery



One key consideration for participants during conversion is the change in timing of the formula delivery when they convert to eWIC.

Currently, Providence starts shipping formula in the last week of the month for the future month. With eWIC, the benefits and the order will not be available until the first day of the month.

What this means for our WIC families is that they had been receiving the formula on the first day or two of each month. Now they will be receiving the product within the first seven days of the each month.

The only time this might be a challenge is in that first month of conversion. Conversion planning with the families will need to include how will they handle this difference in formula during the month they convert-will they have formula left over from a previous month? Will they need to plan to purchase the formula? What will be their back-up plan in those few days when they are adjusting their expected arrival date.

## Formula Warehouse orders during conversion



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Special formula orders are likely to be ones that don't convert. Part of the review of food packages will be looking for participants receiving formulas that need to be provided by Providence.

In the months leading up to conversion, you may want to think about how you will track which families have been getting formula from Providence.

For example, when a certifier does the food package review – how can they identify those participants and determine if a Formula Warehouse order will need to be completed for that family?

Remember, once the medical documentation form has been reviewed and the food package has been assigned by a CPA, any staff person may initiate the formula request. This is a significant change from our current process and will require decisions by each clinic to decide how this will be handled following eWIC roll out.

By talking this step over with your staff now, it will give you time to think about what process needs to be in place in your clinic to track families needing these special formulas.

## Questions

- We will pause to give you a minute to type in any questions you may have...



I've posed a number of questions for your consideration during the course of this webinar. I hope they will guide conversations that you will be having around clinic flow for eWIC.

Now it is your opportunity to ask me questions! I will do my best to answer your questions today. If I do not know the answers, especially if it is in regards to the ins and outs of TWIST, and I will capture them and get the responses out as soon as possible.

I will pause for a moment to give you time to type and then respond to any questions that you might have...

What questions have we received so far?



## Resources

- If you have additional questions please contact your agency's state nutrition consultant or Cheryl Alto at [cheryl.l.alto@state.or.us](mailto:cheryl.l.alto@state.or.us)
- Recorded webinars and FAQ's can be accessed on the WIC website here: <http://public.health.oregon.gov/HealthyPeopleFamilies/wic/Pages/ewic-webinars.aspx>



Thank you for your thoughtful questions!

If you have any additional questions, comments or concerns, please contact your assigned nutrition consultant or myself.

I wish you all the best with your planning and preparations for eWIC! Please know we are here to assist you and we look forward to additional conversations during the face to face trainings.

I have complete confidence that you and your staff will be able to assist the families needing this specialized ordering process .

Thank you for listening today, good bye for now.