Chapter 3: Client Processes

Section 5: Food Packages
Lesson: Assigning and Forecasting Food Packages

Objectives:

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

- identify and assign food packages;
- forecast a chosen food template to the end of a certification period;
- describe which foods will be assigned in Modules A, B, and C;
- interpret food package template coding;
- define the Food Package Status codes;
- navigate to the "Enrollment" and "Family Summary" screens.

Oregon Policies:

- 655 Homeless Applicants
- 713 Breastfeeding: Use of Supplemental Formula
- 730 Bid Formula: Use and Description
- 770 Allowable Foods

Other Resources:

WIC Staff Training: Food Package Module

Overview:

Once a participant has been determined eligible for WIC, a food package must be assigned. The "Food Package Assignment" screen allows you to assign the food package to a participant which best meets their nutritional needs. The TWIST system will automatically assign a standard food package with the maximum amount for each food based on the category of each participant. You may change the food package if needed. The "Food Package Assignment" screen will not be enabled until all enrollment and certification screens receive a checkmark. When the "Food Package Assignment" tab receives a completed check mark, benefits can be issued for the participant.

Instruction:

Overview of "Food Package Assignment" Screen

The starting point for this lesson is:

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

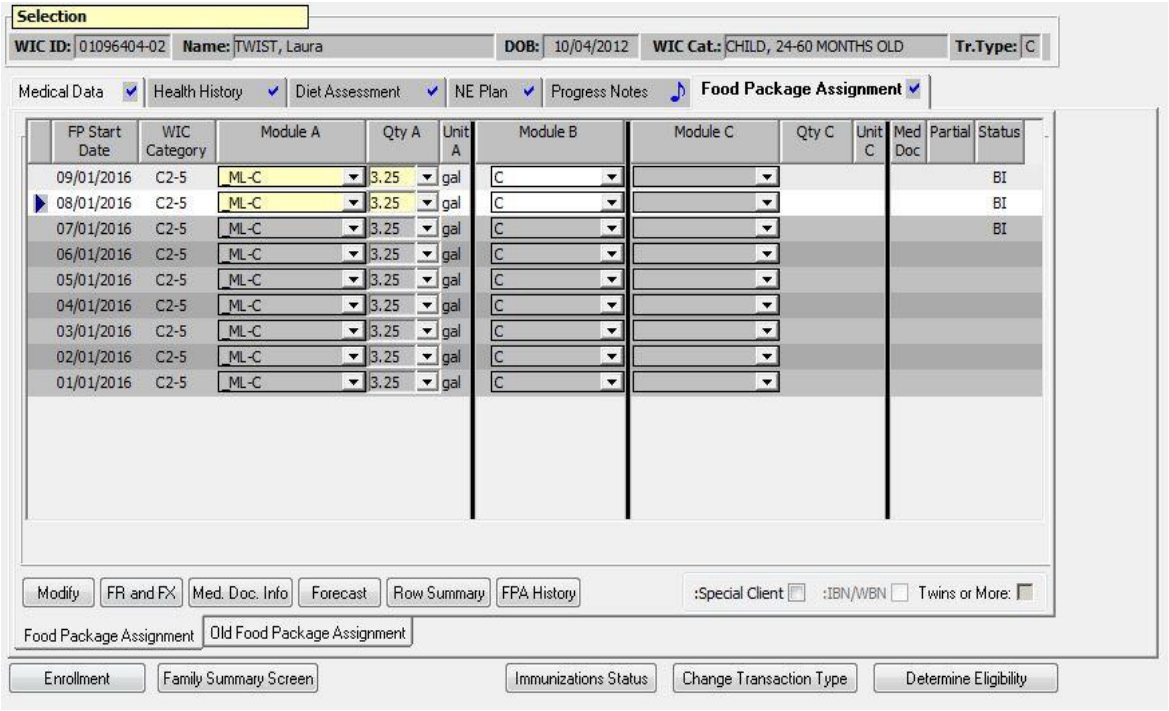

Figure 1: "Food Package Assignment" Screen

Participant Information:

On the top of the screen is the "Selection" section:

- WIC ID number
- Name of the participant
- Participant's date of birth
- WIC category
- Transaction type

Food Package Assignment Information:

The main part of the screen shows the participant's food package information:

- Each row shows the participant's category and food package information for that month.

- Food packages are displayed in chronological order with the past months at the bottom and future months at the top.
- Rows for prior months will be grayed-out.
- Only 6 months of history is displayed. Use the FPA History button to see the archived data.
- The current month is marked with an arrow (line indicator) on the left.
- Participants may have foods in Module A and Module B. Module C is reserved for special formula.

Additional Food Package Assignment Information:

The right part of the screen gives information about food package issuance for each month.

Med Doc:

- Indicates if Medical Documentation is required for that month's food package.
- **R** – Med Doc required but not received
- **Y** – Med Doc required and received
- **Blank** – no Med Doc required
- See Chapter 3, Lesson 503, *"Special" Formula and Medical Documentation* for more information.

Partial:

If a food package is assigned on or after the 20th of each month, this box will be automatically checked, indicating that a partial food package was issued. This box can be unchecked to issue the full package.

Status codes:

- **Blank**: Food package assigned, but no benefits have been issued
- **BI**: Benefits Issued
- **$**: Some Benefits Spent
- **U**: Benefits Updated (needs to be re-issued)
- **FW**: Formula Warehouse (order submitted)
  - See Chapter 3, Lesson 505, *Formula Warehouse*
- **FX**: Formula Exchange
  - See Chapter 3, Lesson 504, *Formula Replacement and Formula Exchange*
- **FR**: Formula Replacement
  - See Chapter 3, Lesson 505, *Formula Replacement and Formula Exchange*

Buttons on the Bottom of the Food Package Assignment Tab:

- **Modify**: To go to the "Modify" pop-up.
  - See Chapter 3, Lesson 501, *Modifying Food Packages"*

- **FR and FX**: To do a Formula Replacement or Formula Exchange
  - See Chapter 3, Lesson 505, *Formula Replacement and Formula Exchange*
- **Med. Doc. Info**: To enter Medical Documentation
  - See Chapter 3, Lesson 503, *"Special" Formula and Medical Documentation*
- **Forecast**: To forecast a food package to future months (see *Forecasting Food Packages* later in this lesson)
- **Row Summary**: To see the history of food package changes for a month.
- **FPA History**: Shows the history of food package assignment for months not displayed (see *Food Package History* later in this lesson)

Client Designation Checkboxes:

The checkboxes on the bottom right of the screen are used for participants who have conditions that change their standard food package.

- **Special Client**: Check this box to assign formula to a child or woman, or to assign extra formula in lieu of foods to an infant over 6 months. See Chapter 3, Lesson 503, *"Special" Formula and Medical Documentation* for more information.
- **IBN, WBN**: Only used for IB & WB (Some Breastfeeding) infant/mother pairs. Checking this box changes the maximum foods allowed for the pair. It allows more formula for the infant and less food for the mother.
- **WBN2**: Only used for a mother who is breastfeeding past 6 months. Checking this box for allows a WB mother whose baby is receiving more formula than allowed for the "Mostly Breastfeeding" category to remain on WIC to receive breastfeeding education and support, nutrition education and other services.
- **Twins or More**: The box displays a checkmark if "Twins or More" is checked on the "Medical Data" screen for a woman. It will increase the maximum foods for the woman to the "twins/multiples" amount.

Old Food Package Assignment Sub-Tab:

This tab displays the food packages assigned and printed prior to the eWIC conversion

Navigation Buttons:

The buttons on the bottom of the screen are used to go directly to other screens.

- Enrollment
- Family Summary Screen
- Immunization Status
- Change Transaction Type
- Determine Eligibility

Assigning Food Packages

Food packages are assigned in three modules - A, B, and C. At least one module is always mandatory.

Module A ➔ milk or formula templates
Module B ➔ food templates
Module C ➔ special formula templates

Each category has a "Standard Food Package" that is automatically assigned by TWIST.

☺ **See Job Aid "Standard Food Packages"**.

It is easy to make small changes to the food package by selecting a different template within a module.

☺ **See Job "Food Packages and Template Codes"**.

1. Retrieve the participant for whom you wish to assign a food package.

Their current food package assignment is displayed.

- For most participants, Module A and Module B automatically default to the "standard food package" for their category.
- The future food package assignments show through the end of their certification period.
- If a participant will be in two different categories during their certification period (for example, Infant to Child), TWIST will automatically assign the standard food package for each category.

If the Standard Food Package does not meet the participant's needs:

2. Select a "non-standard" food package template by clicking the drop down arrow next to the template code in Module A or B.

- In the drop down list, food templates are displayed in alphabetical order by the food template code.

- TWIST will only display templates available for the participant's category.
- "Z" or "ZN" templates are displayed for participants who do not receive food or formula.

3. **Select different quantities of milk or formula by clicking the drop down arrow next to the quantity.**
   - Quantities will display in defined amounts.
   - You can adjust by smaller amounts by using the up and down keys on your keyboard.
   - For "some or mostly breastfeeding (IB)" infants, the standard bid powdered cow's milk formula will default with a quantity of 1 can. You will need to select the appropriate amount of formula from the drop down list.

4. **To make other changes, click the "Modify" button to open the "Modify" pop-up.** See Chapter 3, Lesson 501, *Modifying Food Packages.*

   - Select other types of milk (evaporated, powdered, half gallons).
   - Change the quantity of foods in Module B.
   - Remove foods from the food package.
   - Make more specific quantity changes.

5. **Save.**

♬ NOTE: Any changes to the standard package should be forecasted to future months. (see below)

♬ NOTE: After assigning the food package, you must go to the "Family Summary" screen to issue the benefits. This screen is described in Chapter 3, Lesson 1100, Family Summary Screen.

Forecasting Food Packages

Forecasting is usually used when assigning a non-standard food package. It is used to assign the selected template to the end of the certification period.

- You can select the row for whichever template you want to forecast, including a future month.
- Partial packages cannot be forecasted.
- Grayed-out rows (past months) cannot be forecasted.
- Modules shown as "modified" cannot be forecasted.

♫ NOTE: There are some times when TWIST cannot forecast formula amounts for mostly or some breastfeeding infants (IB). If the formula amount does not forecast, adjust the amount in future months by using the drop down arrows for quantity.

The starting point for this lesson is:

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

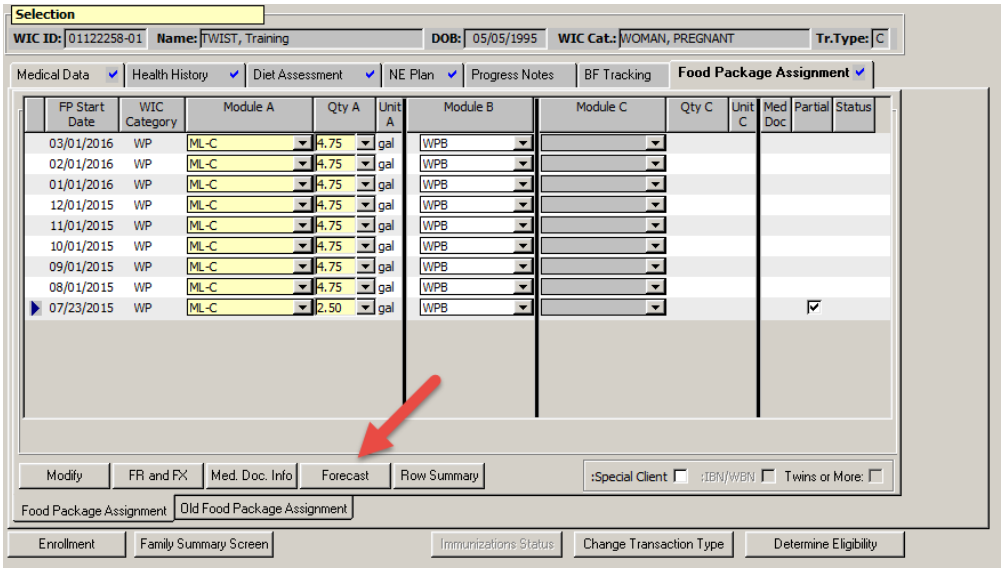

Figure 2: "Forecast" button

1. **Retrieve the participant for whom you wish to forecast a food package.**

2. **Select the row to forecast from.**

3. **Click on the "Forecast" button to apply the chosen row to future months. The "Select Modules to Forecast" pop-up will appear.**

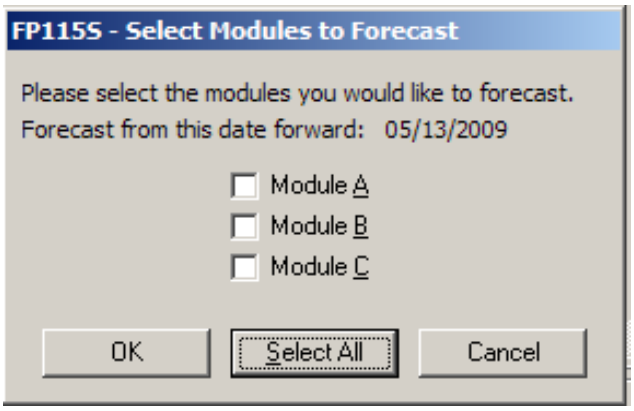

Figure 3: "Forecast" Pop-Up

4. **Select the module(s) you would like to forecast. Click "OK".**

- Clicking on "Select All" in the forecast pop up will allow you forecast all three modules at one time.
- Clicking "Cancel" closes the pop-up without making any changes.

♫ NOTE: Food packages will forecast for as long as it is appropriate for the participant's category.

5. **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*.

✂ *Tips and Shortcuts:*

Z Packages

- Module codes which begin with Z indicate the participant is not receiving milk, formula or foods in that module.
- Z or ZN can be used in mandatory module fields if the participant is not receiving any foods from that module.
- "Z" can be assigned to a fully breastfed infant who does not receive any formula in Module A.
- "ZN" can be assigned to a participant not receiving any milk, foods or formulas in a particular module.

Child Foods During the Month of the Infant's First Birthday

- See Chapter 3, Lesson 501, *Modifying Food Packages* for more information.

"Some or Mostly Breastfeeding Infant (IB)" Category for Infants in First Month

There is no "some or mostly breastfeeding (IB)" category option for infants in their first month, so formula can only be assigned to breastfeeding infants after the infant is one month old.

Women Fully Breastfeeding Multiples

There are special instructions for assigning the food package for women who are fully breastfeeding multiple infants (twins or more). See the **Job Aid: WE-M – Assigning the Food Package**.

Food Package History

Six months of history is displayed on the "Food Package Assignment" screen. Information older than 6 months is archived – it is stored in TWIST, but not displayed.

The starting point for this lesson is:

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

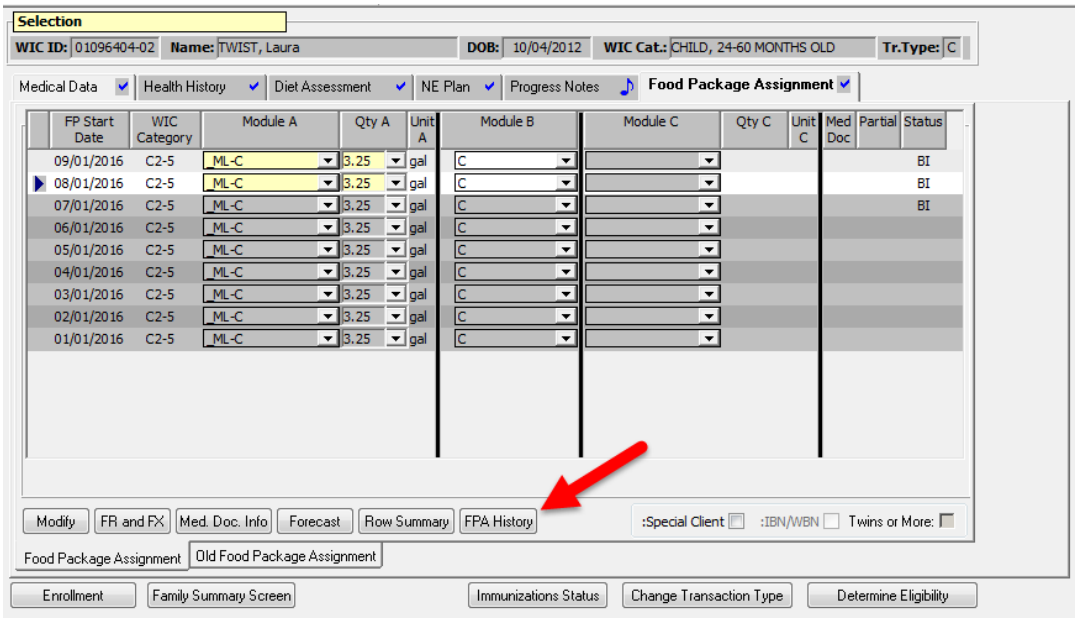

Figure 4: "FPA History" Button

1. To view archived food package information, click the "FPA History" button. The "Archived Benefits" pop-up will appear.

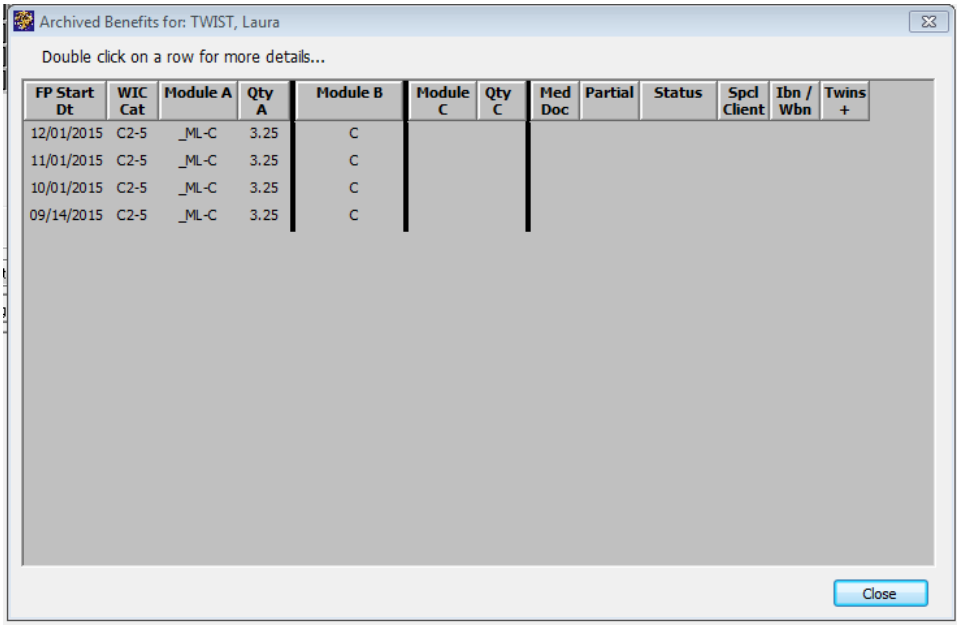

Figure 5: "Archived Benefits" Pop-Up

2. To view specific foods assigned for an archived month, double click the month row to display the foods. The "Subcategories for Benefits" pop-up will display the specific foods assigned for the selected month.

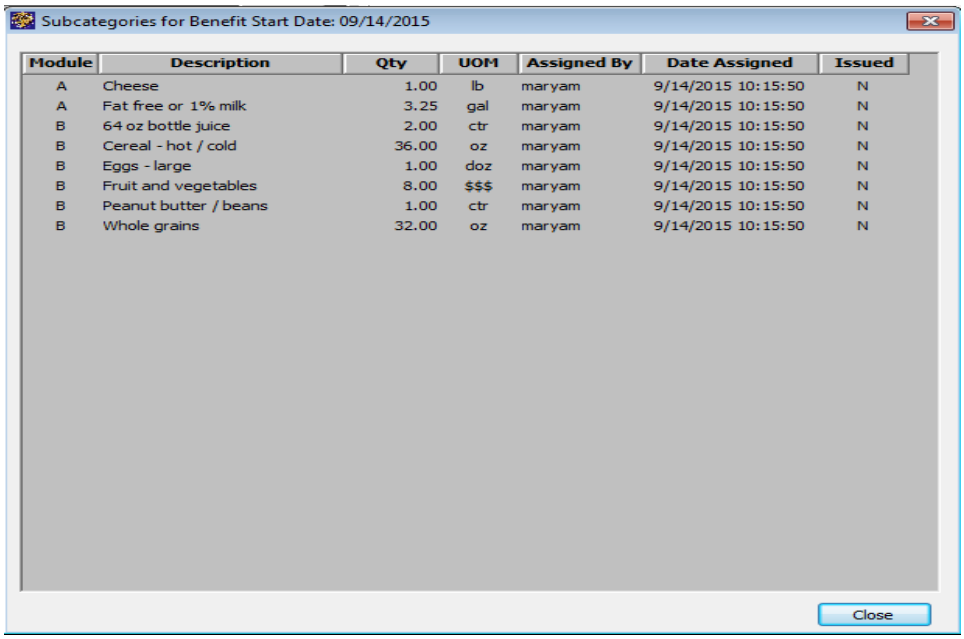

Figure 6: "Subcategories for Benefit" Pop-Up

3. Close to return back to the FPA screen.

NOTE: Historical voucher assignments can be viewed on the "Old Food Package Assignment" screen.

Notes: