

Change Issued Formula

Intro

This HuBERT on-demand training module...

Intro1

...is provided by the MN Department of Health WIC Program. It provides an overview of changing issued formula.

Changing Formula after Redemption

In some instances, participants may need a new formula after they have already purchased some of the originally issued formula.

And they may have a couple of unopened cans that they want to return to clinic, which, as long as they are unopened, we can accept.

The system functions the same regardless of whether cans are returned to the clinic or not.

If redemption of infant foods has occurred, the same process for changing formula is followed.

Remember! Any redemptions of infant foods or formula, or previous adjustments to the current food package, means that we cannot void the current set and must use the Food Adjustment Wizard to correct the issuance.

Scenario

So, let's take a look at this scenario.

Mom has stopped by the clinic because they've been using Similac Advance but her son's doctor suggested that they try Similac Spit-up instead.

She already bought five cans and used two of them and wants to know if she can return the unused formula to us.

We let her know that she should be able to exchange the unopened cans of formula but we need to take a look and see what's what.

Scenario 1

Guis was issued benefits for October, November and December. His cycle is the first to the end of the month and today is November 12th.

Go ahead and open his folder.

<no audio – hint after 5 seconds> Double-click on Guis’ row in the Participant List or click the Open Participant Folder icon.

Demographics

Let’s take a look at his Benefits History.

<no audio> Click the **Benefits History** tab.

Benefits Hx

We’ll expand the nodes for December and November...

Guis was issued 9 cans of powdered Similac Advance for each month.

Although mom said she had purchased some of the formula, we still want to make sure it was for the current set and not a previous month’s benefits.

If she didn’t redeem any of the current benefits, based on our general rule, we would simply Void Current and Future, update the food package and re-issue in the Issue Benefits screen.

Go ahead and open the screen where we can check redemption activity.

<no audio – failure hint> Click the **Benefits Management** menu.

<no audio – failure hint> Select **View EBT Transaction History**.

Transaction Hx

As usual, we’ll change the Start Date to the PFDTU of the current set, which is November 1st.

<no audio – failure hint> Click the Start Date calendar drop-down.

<no audio – failure hint > Select **November 1st**.

Transaction Hx 1

<no audio – failure hint > Click the **Redemption Activity** radio button.

<no audio – failure hint> Click the **Search** button.

Transaction

The purchase was for the current set, November, but since there are other members in the household, we should double-check for whom the purchase was made.

<no audio> Double-click to open the redemption record.

Transaction 1

<highlighted row displays for .5 seconds>

Purchase Record

Yep. The purchase was for Guis for 5 cans of Similac Advance.

Exit the Transaction History by clicking the close buttons.

<no audio> Click the **Close** button.

Close Transaction Hx

<no audio> Click the **Close** button.

Open FAW

We want to change a food already issued. So where do we go from here?

<no audio – failure hint> Click the **Benefits Management** menu.

<no audio – failure hint> Select **Food Adjustment Wizard**.

BF Info

Ah. Guis is some-breastfeeding.

Since we will be re-issuing food items to the WIC Card, if our participant is breastfeeding, HuBERT will prompt us to verify the breastfeeding information when we try to open the Food Adjustment Wizard.

<no audio> Click **OK** or press the Enter key on the keyboard.

BF Date1

Since they are breastfeeding, we need to update the Verified Date. Use the calendar drop-down to do that.

<no audio> Click the **Date Breastfeeding Verified** calendar drop-down.

<no audio> Click the **Today** button.

Re-open FAW

And re-open the Food Adjustment Wizard.

<no audio – failure hint> Click the **Benefits Management** menu.

<no audio – failure hint> Select **Food Adjustment Wizard**.

Save BF Date

<no audio – failure hint> Click **Yes** or press the Enter key on the keyboard.

FAW

We are going to change a food already issued so we can just click OK.

<no audio> Click **OK** or press the Enter key on the keyboard.

Food Category

<no audio> Click the **Food Category drop-down**.

Only applicable food categories will display for an infant and we are changing the formula.

<no audio> Select **FORMULA**.

<no audio> Click **OK** or press the Enter key on the keyboard.

Return Quantity

This time, the **Enter Return Quantity** dialogue displays.

This is because formula is the only food item participants can return to a WIC Clinic.

Return means they have purchased cans of formula with their WIC Card and are bringing the unopened cans to exchange for another type of formula.

Return Quantity1

The system displays the type of formula that was issued.

We can leave this at zero if no cans are being returned.

But Guis' mom bought five cans of Similac Advance, used two of them, and has three unopened she would like to return to us.

Go ahead and use the spin arrow to increase the Number of Cans Returned to the appropriate quantity.

<no audio – failure hint> Click the up spin arrow to increase the **Number of Cans Returned** to 1.

Return Quantity 2

<no audio – failure hint> Click the up spin arrow to increase the **Number of Cans Returned** to 2.

<no audio – failure hint> Click the up spin arrow to increase the **Number of Cans Returned** to 2.

And click OK.

<no audio> Click **OK** or press the Enter key on the keyboard.

Select Formula

The **Select Formula** screen opens which is where we indicate the new formula we are going to issue, which is powdered Similac Spit Up.

Remember, the quantity indicated in this screen is the minimum allowed based on breastfeeding amount and age.

It will not affect the amount of the new formula that we can provide since the quantity reissued will be associated with the previous issuance.

Go ahead and select the replacement formula.

<no audio – failure hint> Select **Similac Spit Up (12.0 oz. pwd) – Rx or FPIII**.

Select Formula 1

And click OK.

<no audio – failure hint> Click OK or press the Enter key.

Special Rx Item

The same validations occur as when we create food prescriptions.

CSP Form

Which means, since Similac Spit Up is a condition-specific protocol (CSP) formula, and our agency has an annual medical documentation form that covers all infants in our agency issued any one of the 19 kcal contract formula until they turn one year old...

We will need the Medical Consultant's last name, LION, to complete the Special Prescription Item dialogue.

Special Rx End Date

Guis' birthdate is September 27th, and since the CSP approval is good until Guis turns one, we should enter his first birth date into the End Date field and select CSP – Similac Rx for the Reason.

<no audio> Type **9/27/20** into the End Date field and select **CSP - Similac Rx** for the Reason.

Physician's Name

Remember, for CSP formulas, we type CSP hyphen and our agency's Medical Consultant's last name.

<no audio> Type **CSP - LION** into the Physician's Name field and click the **OK** button (or press the Enter key).

Special Rx Item 1

<cursor spins>

Formula Replacement

Next, the Formula Replacement screen opens.

The new formula we selected earlier displays above the grid.

It displays the benefit periods we can replace the formula for (in this instance, November and December)...

The formula being replaced, which we can actually view if we click on the cell...

<no audio> Click the November set's **Formula cell** to highlight it.

Formula Hover

...and hover over it.

<no audio> Hover mouse over the highlighted cell.

<no audio> Click when ready to continue.

Amounts Columns

The Amount Issued is the number of cans originally added to the WIC Card;

the Amount Returned, the Number of Cans Returned we entered earlier, which was 3.

Reconstituted Defined

Reconstituted ounces is the total number of fluid ounces one can of formula makes.

Reconstituted Defined 1

The Reconstituted ounces might be helpful in instances where more or less cans than expected are being suggested for issuance since it may be due to a difference in the number of reconstituted ounces between the old and new types of formula.

Reconstituted Column

So the Returned in Reconstituted Ounces column displays the number of fluid ounces the returned cans make.

Recovered Defined

The Amount Recovered is the number of cans still issued to the card that will be removed from the card.

Amounts Columns 1

For the current month, it is the number of cans issued minus the number of cans redeemed, which doesn't display on this screen, but we know to be 5.

For future months, the Amount Recovered should match the original number of cans issued.

Recovered Ounces

The Recovered in Reconstituted Ounces is the number of fluid ounces the cans removed from the card make.

Available Formula

If the reconstitutions of the currently issued formula and the replacement formula are the same, the number of cans of formula available to issue will be the Amount Returned plus the Amount Recovered.

Cans to Issue

In general, we should issue the suggested number of cans that displays in the Cans to Issue column although it can be changed if necessary and appropriate.

Direct Ship

The Direct Ship checkbox can be selected to indicate that the new formula will be issued from our clinic.

We will take a closer look at this in another module.

We are going to issue all suggested cans for each benefit set. To do this, we simply click the Send EBT Data button.

<no audio> Click the **Send EBT Data** button or press the Enter key.

Send EBT Data

<cursor spins>

Successful Replacement Msg

And click OK on the "Formula was changed successfully" message.

<no audio> Click OK or press the Enter key.

Success Wait

<cursor spins>

Open Food Rx

Let's take a look at the Food Prescription tab.

<no audio – failure hint> Click the **Food Prescription** tab.

Food Rx

If we expand the nodes...

...we can see that the system created a new food package for today, a food package with an Effective Date of the December PFDTU, and updated the formula in the future food packages as well, the same as when we change a formula in the food prescription tab.

As usual, let's take a look at Benefits History.

<no audio> Click the **Benefits History** tab.

Benefits Hx After

And we'll take a look inside the nodes...

For the current month of November, we can see that 4 cans of Similac Advance were recovered from the WIC Card and 3 were returned to the clinic, as well issuance of 7 cans of the replacement formula, Similac Spit-up.

For December. the original issuance was voided and 9 cans of Similac Spit-up were issued to the card.

Account Balance

And the Account Balance, or the WIC app, will reflect the same thing.

<no audio> Click when ready to continue.

End

Thank you for reviewing this HuBERT on-demand training module presented by the MN Department of Health WIC Program.