

These steps go over how to exchange infant formula already issued to the participant. This includes benefits on the WIC EBT account and unopened formula the participant already purchased with WIC benefits. Staff must know if participants redeemed any formula and how many of those cans are part of the exchange before they start. For policy, see [Volume 1, Chapter 23 WIC Foods](#).

Steps	Cascades Screen
<p>1. Select Infant icon in Family Carousel.</p> <ul style="list-style-type: none"> Click Infant icon. Note the Icon should have a grey box around it once selected. 	
<p>2. Create New Prescription:</p> <ul style="list-style-type: none"> Select Prescribe Foods. Select plus sign (+) to create a new prescription. You will see Select the New Food Prescription Date. Select Save. 	

3. Add New Formula:

- **DO NOT** make changes to the current formula already in the **Food Prescription Items** container.

Instead, add in the new formula.

- Under **Add Item to Food Prescription**:
 - **Category** = Infant Formula (IF) or Exempt Formula

Note: Depending on the type of formula needed, you will select **Infant Formula or Exempt Formula** (see boxes.)

- **Subcategory** = Nutramigen Powder, for this example.
- Enter **Quantity**.
- Select **Add Item**.

Food Prescription Items			
	Category	Subcategory	Quantity
	Infant Cereal	Baby Cereal - all WIC	24
	Infant Fruits & Vegetables	Baby Food Fruit & Vegetables - All WIC	128
✗	Infant Formula (IF)	Similac Advance Powder 12.4 oz	600

Do NOT touch any of this until later.

Add Item to Food Prescription

Category: Exempt Infant Formula (EXF) →
Subcategory: Enfamil Nutramigen Powder 12.6 oz →
Quantity: 696 →
Max / Med Max: 0 / 960
 UOM: Ounce

Category = Infant Formula

- Standard formula
 - Similac Advance
 - Similac Soy Isomil
- Or
- Alternative:
 - Similac Sensitive.
 - Similac Spit-up.
 - Similac Total Comfort.

Category = Exempt Formula

- Formula requiring MDF and diagnosis.

For example:

- NeuroPro EnfaCare
- Nutramigen.
- Extensive HA.
- Alimentum
- NeoSure

<p>4. Note Status Message(s):</p> <ul style="list-style-type: none"> • Quantity exceed the Max. <ul style="list-style-type: none"> ○ This is normal. ○ We will adjust later. • Medical Documentation Required. <ul style="list-style-type: none"> ○ Will appear if required. ○ Do NOT fill this out until prompted. 																
<p>5. Complete Medical Documentation Form (MDF):</p> <p>The MDF will automatically open, if it's required.</p> <ul style="list-style-type: none"> • Enter the following: <ul style="list-style-type: none"> ○ Effective Date ○ Expiration Date ○ Medical Reason ○ ICD Code = NA ○ Physicians Name ○ Physicians Phone • In Medical Food Prescription container: <ul style="list-style-type: none"> ○ New formula should appear. • Select Save. 	<p>Attach Medical Documentation</p> <p>Important! Make sure you have the right Expiration Date.</p> <p>Prescription Dates</p> <p>Effective Date ★ 6/28/2019 Expiration Date ★ 7/28/2019 Prescription Date 6/28/2019</p> <p>Diagnosis Information</p> <p>Medical Reason ★ ICD Code ★ OR Diagnosis Code ★ OR Verbal Order ★</p> <p>Physician Information</p> <p>Physician's Name ★ Physician's Phone ★ Physician's Email Medical Food Prescribed Non-Medical Fo</p> <p>Medical Food Prescription</p> <table border="1"> <tr> <td><input type="checkbox"/></td> <td></td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Infant Cereal</td> <td>Baby Cereal - all WIC</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Infant Fruits & Vegetables</td> <td>Baby Food Fruit & Vegetables - All WIC</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Infant Formula (IF)</td> <td>Similac Advance Powder 12.4 oz</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Exempt Infant Formula (EXF)</td> <td>Enfamil Nutramigen Powder 12.6 oz</td> </tr> </table> <p>Save Cancel</p>	<input type="checkbox"/>			<input type="checkbox"/>	Infant Cereal	Baby Cereal - all WIC	<input type="checkbox"/>	Infant Fruits & Vegetables	Baby Food Fruit & Vegetables - All WIC	<input type="checkbox"/>	Infant Formula (IF)	Similac Advance Powder 12.4 oz	<input checked="" type="checkbox"/>	Exempt Infant Formula (EXF)	Enfamil Nutramigen Powder 12.6 oz
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6. Finalize Current Food Prescription:

- **Note** *Validation Summary* and *Status Message* will appear.
 - This is normal;
 - It's now time to reduce the old formula.
- **Close** the Validation Summary pop-up.
- **Note** you will see both the old and new formula with quantities.
- **Zero out** the old formula quantity (e.g. Similac Advance).
- Select **Save**.

Validation Summary: 1

! Category maximum exceeded for Infant Formula (IF) for prescription with date 6/28/2019 12:00:00 AM

Close Validation Summary pop-up.

Subcategory
Baby Cereal - all WIC
Baby Food Fruit & Vegetables - All WIC
Similac Advance Powder 12.4 oz
Enfamil Nutramigen Powder 12.6 oz

Corrected amount

Quantity	Quantity
24	24
128	128
600	0
696	696

Alternate Funding Medical Documentation **Save** Cancel

TAB 100%

7. Update All Future Food Prescriptions (Rx's):

- Review all future infant Rx's in the carousel.
- Update any Rx with formula.
- Select **Save** after all changes are made.

5/31/2019 6 to 11 Months | 6/28/2019 6 to 11 Months | **8/25/2019 12 to 23 Months**

Category: Breastfeeding Status Fully Formula Fed | Family Issuance Day: 31 | Issuance Frequency: 2 Month(s)

Buttons: Formula Wizard, **Save**, Cancel

8. Review Issue Food Instruments

- The system will take you to the **Issue Food Instruments** screen.
- Since the participant has benefits already issued, you will see the word **Issued** next to each month already provided.

Issue Food Instruments

Configuration: Family Issuance Day: 31, Issuance Frequency: 2 Month(s)

Category	Participant	Certification End Date	May	Jun	Jul	Aug
<input checked="" type="checkbox"/> Pregnant	SAMANTHA MILLER	1/31/2020	Issued	Issued	Issued	Not Selected
<input checked="" type="checkbox"/> Infant	TIM MILLER	11/30/2019	Issued	Issued	Issued	Not Selected
<input checked="" type="checkbox"/> Child	KATIE MILLER	6/30/2020	Issued	Issued	Issued	Not Selected

9. Void Future Benefits:

If future benefits (July) are issued, you will need to void.

- Go to **Food Instrument List**
- Mark the box next to any future benefits.
- Click on **Void Selected**.

Family Food Instruments

Serial #	First Date to Spend	Last Date to Spend	Status
405	5/31/2019	6/29/2019	Redeemed
406	6/30/2019	7/30/2019	Issued
407	7/31/2019	8/30/2019	Issued

Buttons: **Void Selected**, Replace

See [Cascade Steps – Replace Future Benefits](#) for more details.

10. Exchange Current Formula:

- Select **Exchange/Increase Formula** in Quick Links.
 - Under **Select the Formula Being Returned:**
 - **Food Category** = Infant Formula
 - **Food Subcategory** = Old formula (Similac Advance)
 - **Quantity** = # of unopened formula containers brought back to the clinic.
 - **Quantity from EBT Account** = # of formula containers remaining on the WIC EBT account.
- Note:** See **Current Month EBT Benefit Balance** for quantity.

Issue Benefits

- Prescribe Food
- Issue Food Instruments
- Food Instrument List
- Replace Current Benefits
- Exchange/Increase Formula

Exchange or Increase Formula

Select the Formula Being Returned

Food Category	Food Subcategory	Quantity	Quantity from EBT Account
Infant Formula (IF)	Similac Advance Powder 12.4 oz	1 Cans	4 Cans

Current Month EBT Benefit Balance

Food Category	Subcategory	Quantity	UoM
Infant Formula (IF)	Similac Advance Powder 12.4 oz	4	Cans

Cans Originally Issued: 0 Total Returned Cans: 0

RFO Newly Prescribed: 0 Cans Newly Prescribed: 0 Cans After Proration: 0

Total Cans: 0

Unopened cans brought into clinic

Formula benefits currently on the WIC EBT account.

Exchange Current Formula

Continued:

- Under **Select the Replacement Formula:**
 - **Food Category** = Infant Formula.
 - **Food Subcategory** = New formula (Nutramigen).
- The system will automatically update the **Total Replaced Cans**.

See **Note** related to example.

- Select **Save**.

Select the Replacement Formula

Food Category	Food Subcategory	Total Replaced Cans
<input type="text"/>	<input type="text"/>	0

The total will automatically change.

Food Category	Food Subcategory	Total Replaced Cans
Exempt Infant Formula (EXF)	Enfamil Nutramigen Powder 12.6 oz	7

Formula Wizard

Save Cancel

TAB 100%

Note:

1 can returned to office
 + 4 cans returned from participant WIC EBT account
 = 5 total cans of formula returned

In this example the **participant returned 5 cans** and the **Total Replaced Cans = 7**. This happened due to the following:

- The # of fluid ounces per can are different for each formula type. The system will adjust accordingly.
- The system will then round up the total amount of fluid ounces needed to get a full can of formula.

11. Confirm Formula Replaced:

The system will redirect you to the **Food Instrument List** screen.

- **Status Message** will confirm benefits issued successfully.
- **Print Shopping List:**
 - **Review and confirm** that family benefits now include new formula (Nutramigen).
 - **If correct** on shopping list, you know the benefits were successfully issued to the EBT account.

The screenshot displays the 'Family Food Instruments' interface. At the top is a table with columns: Serial #, First Date to Spend, Last Date to Spend, Status, Issue Date, and Print Date. Below the table, a yellow 'Status Message' box states 'Food Instrument was issued successfully.' Below the message are buttons for 'Print Shopping List', 'Void Selected', 'Replace', and 'Cancel'. A red arrow points from the 'Print Shopping List' button to a rounded rectangular box containing the text '6/28/2019 thru 7/30/2019' and 'Enfamil Nutramigen Powder 12.6 oz'.

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For persons with disabilities, this document is available on request in other formats.

To submit a request, please call 1-800-525-0127 (TDD/TTY call 711)

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