

Ordering Formula from the State

I. Issuing state ordered formula only:

- a. Select the “Special Diet” check box. Enter medical documentation information from the Formula and Food Authorization Form (FAFAF) under Documentation.
- b. Select “State Ordered Formula-Infant-Part BF,” “State Ordered Formula-Infant-Full Formula,” or “State Ordered Formula-Children and Women” from the Model Food Package drop down list according to the participant’s category and breastfeeding description.
- c. If an infant is partially breastfeeding out-of-range and receiving state ordered formula, select “State Ordered Formula-Infant-Part BF” and change the quantity from “1” to “2.” This will move the infant out-of-range and allow the mom to receive a postpartum package if the infant is less than 6 months of age.
- d. The “Direct Ship” check box must be selected in the food package grid. This allows the VISION system to recognize that the participant is receiving a state ordered formula benefit without actually receiving checks. Once the package has been verified, the package must be printed. Actual checks will not print for this package because the “Direct Ship” check box was selected and will be registered into the system that benefits were issued.

II. Issuing state ordered formula and complementary foods:

- a. Select the “Special Diet” check box. Enter medical documentation information from the Formula and Food Authorization Form (FAFAF) under Documentation.
- b. Select an appropriate model food package with the desired complementary foods.
- c. State ordered formula does not need to be added to the food package grid because the system recognizes benefits are being issued through the printed food instruments.
- d. If Medicaid is providing all of the specialty medical formula, then after checking the “Special Diet” check box, open the Model Food Package drop down list. Select “Medicaid Provided Formula-Infant-Part BF,” “Medicaid Provided Formula-Infant-Full Formula,” or “Medicaid Provided Formula-Children and Women” according to the participant’s category and breastfeeding description. Then, select the check box for “Direct Ship”. This allows the VISION system to recognize that the participant is

receiving medical formula benefit covered by Medicaid without actually receiving checks. Once the package has been verified, the package must be printed. Actual checks will not print for this package because the “Direct Ship” check box was selected and will be registered into the system that benefits were issued.

III. Steps for Ordering Special Formula in SharePoint

- a. When ordering exempt formulas or medical products, enter the following information into the WIC SharePoint site. Proration will be done only in the local WIC clinic and based on the number of days remaining in the month, rather than the 10 or 20 day computer based proration. Or, staff may provide the entire month’s allowance adjusting the beginning issuance date to the date that the participant comes into the clinic to pick up the formula, while the ending date would be the same date the following month. These adjustments should all be documented on the paper formula logs in the clinic, and in the computer if desired.
 - i. Participant ID
 - ii. Participant DOB
 - iii. Participant first/last name
 - iv. Clinic RD/CPA
 - v. Clinic Name
 - vi. Vouchering period (First and Last Day of Vouchering Period)
 - vii. Specific amount of formula prescribed (i.e. 3 cans per day) a range is not appropriate); WIC Max or Full WIC Provision is not an allowed option for amount.
 - viii. Formula Product name (specify flavor, size if applicable)
 - ix. Formula Product Quantity; may be completed or left blank for State RD to complete (amount must include modulars and cannot exceed maximum monthly allowance or MMA).
 - x. Medicaid default to No (change if necessary)
 - xi. Tube fed default to No (change if necessary)
 - xii. Plan/comments. Calorie amount per ounce (20 kcal/oz, 24 kcal/oz or 30 kcal/oz), flavor, extra in clinic etc.
- b. For either a partial or full month’s issuance, the quantity entered into SharePoint must be based on the physician’s order on the FAFAF (oz/day or cans/day), including modulars, not exceeding the USDA maximum monthly allowance or MMA.
- c. The state RD staff reviewing the orders submitted by local RD staff shall consult with the local RD staff prior to making any changes that were entered in the original order in Special Formula of SharePoint and before submitting in the “Ordered” status. If the local RD left the “Formula Product Quantity” field blank in the original order, the state RD shall determine and enter the quantity amount without consulting the local RD.

- d. If the local RD who entered the Special Formula Order Form has any questions about the order or formula amount, the State RD indicated in the State Staff Section shall be contacted for clarification. If the State RD is not available, then the State Nutrition Coordinator shall be contacted for clarification.

IV. Steps for Receiving

- a. Upon receipt of state ordered formula from the pharmacy, document the following:
 - i. Date/amount formula was received
 - ii. Client first name
 - iii. Client last name
 - iv. Participant ID
 - v. Product name
 - vi. Product amount
 - vii. Issuance Period
 - viii. Expiration dates on all packaging
 - ix. Signature of WIC staff verifying amount and product received was correct based on original order
- b. Do not accept formula that expires within 90 days.
- c. Formula can only be issued within the issuance period. Formula distributed late in the issuance period should be prorated.
- d. The pharmacy will accept formula returns if it is damaged or mistakenly issued by the pharmacy. The pharmacy will also accept returned formula that is no longer needed as long as it has not left the clinic and will not expire within 90 days.

V. Storage: Adequate storage is required that minimizes the danger of loss due to theft, infestation, fire, spoilage, or other causes.

- a. Unopened liquid or powder should be kept at room temperature.
- b. Storage area should be free of pests.
- c. Formula should be stored in a locked room with limited access to minimize the danger of loss or theft.

VI. Loss/Theft Formula Reporting: Local agencies only hold small quantities of formula from the time the pharmacy delivers the product to the time the client picks up the product. Monthly orders are done for each participant with monthly pick-ups.

- a. Call the State Office to report any loss or theft of formula.
- b. Document in the participant's order in SharePoint, under the Plan/Comment section what has occurred.

VII. Steps for Issuing

- a. Upon issuing state ordered formula document the following:
 - i. Date formula was issued to client
 - ii. Signature of WIC staff issuing formula to client
 - iii. Signature of client
 - iv. Product name
 - v. Product amount
 - vi. Product expiration date
 - vii. Issuance Period

VIII. Steps for Returning Formula

- a. If a product is no longer needed and/or was never picked up by the participant, use the Return Formula Form in SharePoint. It is best practice to return as soon as possible, once the formula is deemed no longer necessary. Do not use this form if there was an error in the pharmacy delivery, such as wrong product/flavor. Call a state RD regarding errors in pharmacy deliveries.
 - i. Go into Special Formula.
 - ii. Search for the client whose order needs to be returned.
 - iii. Click on the pencil/paper edit button to open the order.
 - iv. On the bottom there is a Return Formula button-click on it.
 - v. The red asterisks show (*) the slots that need to be completed.
 - 1. Staff Name: The staff person putting the return order in.
 - 2. Formula Product Name: auto-populated.
 - 3. Quantity: Number of cans returning.
 - 4. Earliest Expiration Date: The soonest expiration date on the container (needs to be at least 90 days out).
 - 5. Add'l Formula Product Name: auto-populated.
 - 6. Quantity: Number of cans returning.
 - 7. Reason for Return/Comments: Reason the product is being returned or any additional comments for state RD staff/pharmacy.
 - vi. If the original special formula order had two products ordered, both will be auto-populated into the return section. If only the second product is being returned, a 0 in the quantity box for the first product must be entered (a required field).