Issuing Food Benefits in Cascades
Top Issues – A Training for WIC staff

Washington State Department of
Health
Office of Nutrition Service

CASCADES
WASHINGTON WIC

TOPICS

1. ISSUING WIC CARDS – Important things to know

2. FAMILY ISSUANCE DAY – Defining the benefit cycle

3. PRORATION – Food for the time remaining in the benefit cycle

4. REPLACING BENEFITS – Flowchart to guide the process

5. ISSUING BENEFITS at 1 AND 5 YEARS OF AGE – Tips and guidance

6. TROUBLESHOOTING BENEFIT ISSUANCE – Solving common issues

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ISSUING WIC CARDS
Important things to know

ISSUING A WIC CARD IN CASCADES

- Enter a date of birth for all participants and adults listed in the file.
  - ○ Cascades requires a date of birth for any person who might receive a WIC Card.

- Benefits are in the Electronic Benefit Account (EBA), not on the card.
  - ○ Participants set up a Personal Identification Number (PIN), then use the WIC Card and enter the PIN at the store to access the EBA and purchase the foods.

TIP!
Verify the date of birth for all participants and adults **before** pressing the Certify button

ISSUING A WIC CARD IN CASCADES

1. Things to know about the Cardholder
   o Select the Cardholder and issue one WIC Card per family
   o Each foster child is considered a family of one and receives a separate WIC Card and is the Cardholder
   o The Cardholder's date of birth is used when setting the PIN
   Note: If a mailing address and physical address are entered in Cascades, the **mailing address zip code** is used when setting the PIN

2. Issue the WIC Card to the cardholder **before** issuing food benefits
   o Place the cursor in the **Card Number** field and **SWIPE** the card in the signature pad/card reader
   o The person doesn't sign for the card, but does sign each time food benefits are issued

FAMILY ISSUANCE DAY
Defining the benefit issuance cycle

WHAT IS THE FAMILY ISSUANCE DAY?

The Family Issuance Day defines the benefit cycle
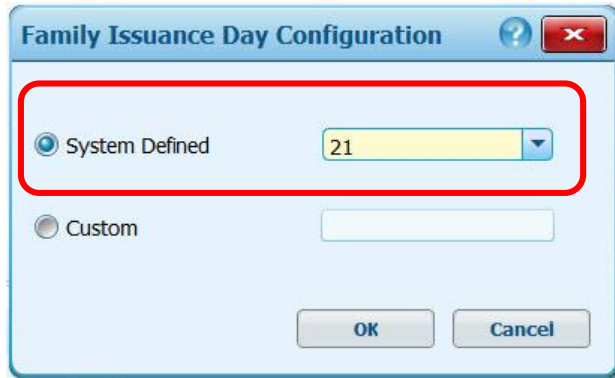

FAMILY ISSUANCE DAY

Day of the month the family's food benefits are available to purchase in the EBA

Example Benefit Cycle with Family Issuance Day = 21ST

First Date to Spend: 6/21/2019
Last Date to Spend: 7/20/2019

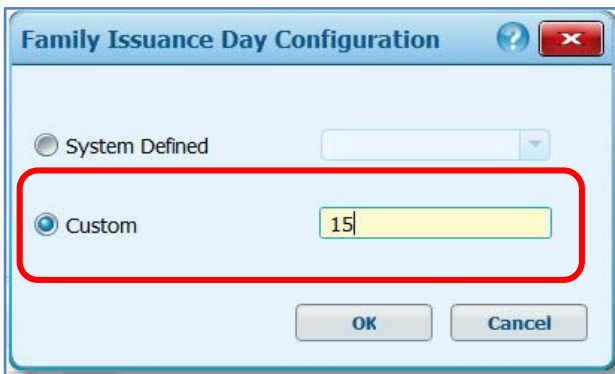# FAMILY ISSUANCE DAY

System Defined

Cascades sets the **System Defined** Family Issuance Day when the first person in the family is certified

- All participants in the family have the same issuance day.

- Cascades prorates benefits for a new participant in the family when needed to align their benefits with the Family Issuance Day.

- The person receives full food benefits for future months.

Custom

Staff can change the Family Issuance Day to a **Custom** date in limited situations

- Staff can only change the Family Issuance Day when there are no current or future benefits issued.

- Current means within the First and Last Date to Spend, <u>even if all the benefits have been purchased</u>.

- Cascades doesn't allow benefit dates to overlap.

WHAT IS THE FAMILY ISSUANCE DAY?

CLIENT SERVICES TO CASCADES

The Family Issuance Day for
migrated participants

- The First Day to Use from the family's current or future WIC checks in Client Services

OR

- The 1st if there aren't current or future checks

We've found in *most* cases, keeping the migrated Family Issuance Day works best.

See Transition Guidance about choosing a System Defined or Custom Issuance date

PRORATION
Food for the time remaining
in the benefit cycle

What is Proration?

Proration means reducing food benefits to provide the appropriate amount for the time remaining in the participant's benefit issuance cycle

- Most WIC programs prorate food benefits
- FNS encourages proration to prevent over-issuance and inappropriate selling of WIC food and formula

Washington WIC uses ¼ proration
- Food benefits decrease by a set amount every 7 days past the Family Issuance Day
- Some foods **don't** prorate

Days After Family Issuance Day	Food Package Size
1 – 7	Full package
8 – 15	¾ package
16 – 23	½ package
24 – 31	¼ package

The following slides show examples of proration
The **Cascades Staff Tool: Family Issuance Day and Proration** has more information and examples

Example of Proration – Pregnant

Pregnant				
WIC Food	**Full food package**	**¾ food package**	**½ food package**	**¼ food package**
Milk	4.75 gallons	3.75 gallons	2.50 gallons	1.25 gallons
Juice	3 containers	2 containers	2 containers	1 container
Cereal	36 ounces	27 ounces	18 ounces	12 ounces
Peanut butter/Beans	2 containers	2 containers	1 container	1 container
Bread/Whole Grains*	16 ounces	16 ounces	16 ounces	16 ounces
Eggs*	1 dozen	1 dozen	1 dozen	1 dozen
Cheese*	1 pound	1 pound	1 pound	1 pound
Fruits and Vegetables*	$11.00	$11.00	$11.00	$11.00

* These foods don't prorate for Pregnant participants

Example of Proration – Formula fed Infant

Fully Formula Fed Infant 6 to 12 months of age				
WIC Food	**Full food package**	**¾ food package**	**½ food package**	**¼ food package**
Infant formula Similac Advance powder	7 cans	5 cans	4 cans	2 cans
Infant cereal	24 ounces	24 ounces	24 ounces	24 ounces
Infant fruits and vegetables	128 ounces	96 ounces	64 ounces	32 ounces

NOTES:

- Proration applies when changing from no formula to any amount of formula (Based on when formula is issued in relationship to the Family Issuance Day)

- Proration doesn't apply when the infant received some formula and the amount is increased or the formula type is changed

- Infant cereal doesn't prorate due to the size of the box of cereal

Example of Proration – Child

WIC Food	Full food package	¾ food package	½ food package	¼ food package
Milk	3.25 gallons	2.50 gallons	1.75 gallons	1 gallon
Juice	2 containers	2 containers	1 container	1 container
Cereal	36 ounces	27 ounces	18 ounces	12 ounces
Bread/Whole Grains	32 ounces	24 ounces	16 ounces	16 ounces
Eggs*	1 dozen	1 dozen	1 dozen	1 dozen
Peanut butter/Beans*	1 container	1 container	1 container	1 container
Cheese*	1 pound	1 pound	1 pound	1 pound
Fruits and Vegetables*	$8.00	$8.00	$8.00	$8.00

Child header spans all columns.

* These foods don't prorate for Child participants

Family Issuance Day and Proration

Cascades calculates the most food benefits participants can receive

Sometimes changing the Family Issuance Day to prevent prorating food benefits
actually **decreases the foods the family receives**
by **eliminating** a month of prorated benefits

Issue Food Instruments							

Configuration

Family Issuance Day
21

Issuance Frequency
3 Month(s)

Family Issuance Members — Total Items: 2

☑	Category	Participant	Certification End Date	Jun	Jul	Aug	
☑	Pregnant	PREGNANT PRORATION	11/30/2019	1/4	Full	Full	Change Rx
☑	Infant	BABY PRORATION	12/31/2019	1/4	Full	Full	Change Rx

Let's see an example with the "Proration" family

Family Issuance Day and Proration

Proration family scenario: Staff **don't** change the Family Issuance Day

- The "Proration" family missed their appointment in June
- They come to the clinic July 15th for food benefit issuance
- The family's System Defined Family Issuance Day is the 21st
  - This defines the family's benefit issuance cycle as follows:
    Current: 6/21/19 – 7/20/19 (family is in on 7/15/19)
    Future: 7/21/19 – 8/20/19
- Since June benefits are still current, Cascades will issue prorated June benefits (¼ benefits) and full benefits for July and August

Family Issuance Day and Proration

Proration family scenario: Staff **do** change the Family Issuance Day

- The "Proration" family missed their appointment in June and come to the clinic July 15th for food benefit issuance

- Since there aren't any current or future benefits issued, Cascades allows staff to change the System Defined Family Issuance Day from the 21st to the 15th

  - In this example the staff person changes the Family Issuance Day to the 15th, which changes the family's benefit issuance cycle as follows:
    Current: 7/15/19 – 8/14/19 (family is in on 7/15/19)
    Future: 8/15/19 – 9/14/19

- June benefits are no longer current and Cascades must remove them. <u>The family won't receive any June benefits</u>.

Family Issuance Day and Proration

Family Issuance Day – best practices:

- Use the **System Defined** Family Issuance Day
- Let Cascades calculate the food benefit amount
- Schedule food benefit issuance either shortly before or within 7 days after the Family Issuance Day
- Only change the Family Issuance Day when there's a need to "reset" the issuance day

Talking about Proration with Participants

Proration provides the amount of food for the time left in the benefit cycle

All the days of the benefit cycle are covered

QUOTES FROM PILOT STAFF:

"I have not had any negative comments about proration."

"It appears that proration often **benefits** the participant."

How will you talk to participants about their benefit amount?

"I thought this was going to be a big factor, but it hasn't been."

REPLACE FOOD AND FORMULA BENEFITS
Flowchart to Guide the Process

CASCADES
WASHINGTON WIC

Replace Food and Formula Benefits in Cascades

There are many things to consider when replacing food and formula benefits in Cascades

Starting in the right direction can save **time**, **energy,** and prevent **issues**

We'll review the different ways to replace food and formula in Cascades and the **Cascades Steps** available to assist you with each process

Replace Food and Formula Benefits in Cascades
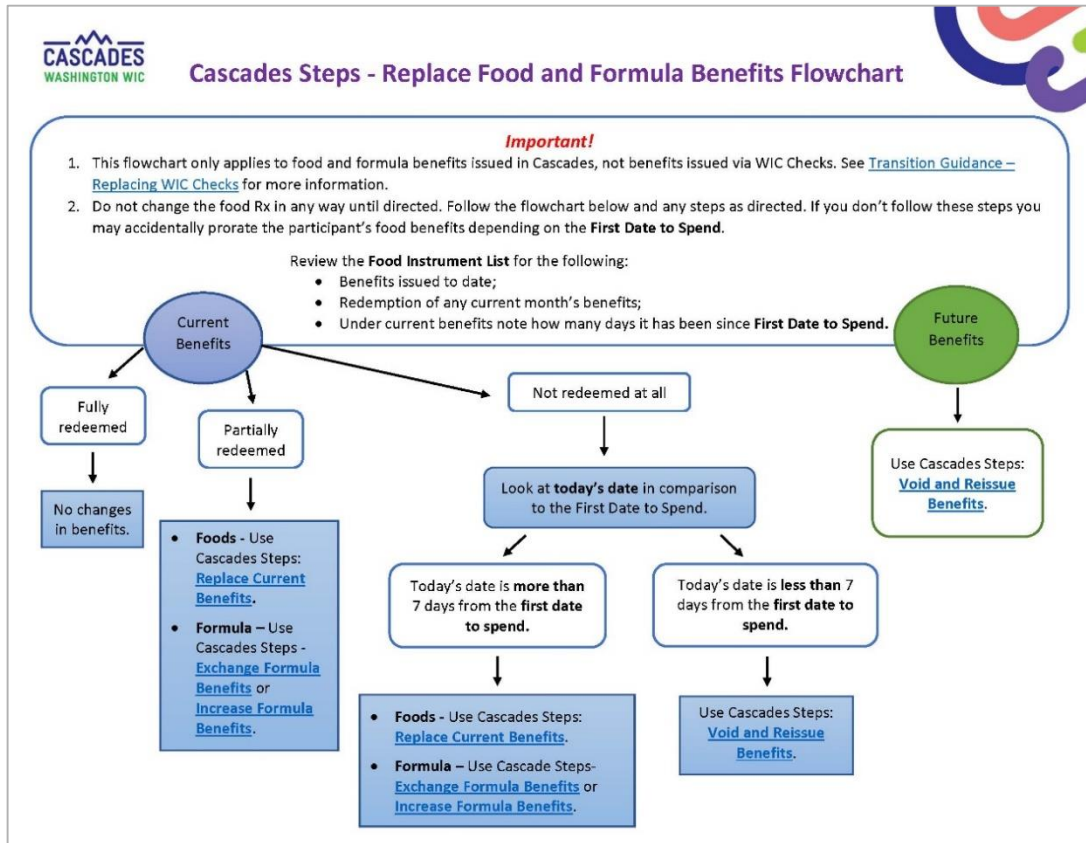
Replace Food and Formula Benefits Flowchart

- Use this **Flowchart** and the Cascades **Food Instrument List** (shown on the next slide) to identify the right process to replace food and formula benefits

- The Flowchart links to the specific **Cascades Steps** to assist you

Cascades Food Instrument List

1. Check the **First and Last Date to Spend**
   - See if current or future benefits are issued
   - Note if the First Date to Spend is more or less than 7 days ago

2. Check the **Status** of the benefits
   - **Issued** – benefits were issued, but no benefits were redeemed (purchased)
   - **Redeemed** – some or all the benefits were purchased
   - **Voided** – the benefits were voided and aren't available to purchase

3. Review the **Shopping List** to see what benefits remain

		Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date	Print Date	Voided Date	Void Reason
☐	🔍	3328	3/26/2019	4/25/2019	Redeemed	3/26/2019			
☐	🔍	3329	4/26/2019	5/25/2019	Voided	3/26/2019		4/23/2019	Food Prescription Change
☐	🔍	3330	5/26/2019	6/25/2019	Voided	3/26/2019		4/23/2019	Food Prescription Change
☐	🔍	6947	4/23/2019	4/25/2019	Issued	4/23/2019			
☐	🔍	6948	4/26/2019	5/25/2019	Redeemed	4/23/2019			
☐	🔍	6949	5/26/2019	6/25/2019	Voided	4/23/2019		5/24/2019	Food Prescription Change
☐	🔍	9583	5/17/2019	5/25/2019	Redeemed	5/17/2019			
☐	🔍	10296	5/26/2019	6/25/2019	Redeemed	5/24/2019			
☐	🔍	14277	6/26/2019	7/25/2019	Redeemed	6/26/2019			
☐	🔍	14278	7/26/2019	8/25/2019	Issued	6/26/2019			

Family Food Instruments — Total Items: **10**

Print Shopping List | Void Selected | Replace | Cancel

Determine the Process for Replacing Benefits

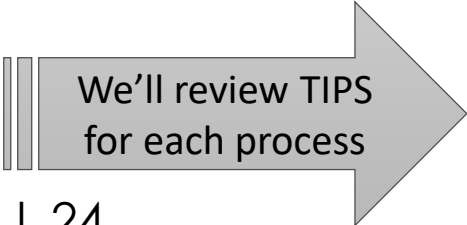| Current Benefits	
Fully Redeemed (all foods purchased)	Can't replace benefits
Partially Redeemed (some foods purchased)	Can replace remaining benefits ❖ **Replace Current Benefits** (for foods) ❖ **Exchange/Increase Formula** (for formula)

Not Redeemed at all
(issued, no purchases)
	Can replace all benefits
	Compare today's date to First Date to Spend (FDTS)
	• If today's date is more than 7 days past the FDTS
	    ❖ **Replace Current Benefits** (for foods)
	    ❖ **Exchange/Increase Formula** (for formula)
	• If todays' date is less than 7 days past the FDTS
	    ❖ **Void** benefits, then **Issue**

Future Benefits	
Issued	Can replace all benefits ❖ **Void** benefits, then **Issue**

We'll review TIPS for each process

Replace Current Benefits

TIPS FOR REPLACING CURRENT BENEFITS

- Use the **Replace Current Benefits** screen for <u>foods</u> only (not formula).
- Use the **Change Rx button** on the Replace Current Benefits screen to change the food prescription.
    - If you don't use the Change Rx button, you may prorate the benefits.
- Review the **Replacement Food Instrument (FI) Details** to make sure you have the right replacement foods.
- **Print the Shopping List** to verify the new foods were issued.

Use the **Cascades Steps – Replace Current Benefits** to guide you

Exchange or Increase Formula Benefits

Use this screen to exchange or increase
current month formula benefits

Use these **Cascades Steps** to guide you:
- **Increase Formula**
- **Exchange Formula**

TIPS FOR EXCHANGING FORMULA BENEFITS

- **Add the new formula to the food prescription first**, before zeroing the quantity of the previous formula.

- If Medical Documentation is involved:
  - Expire existing Medical Documentation first.
  - **Wait** to enter new Medical Documentation until prompted by Cascades when adding the new formula.

- Cascades calculates the correct amount of formula to exchange based on the formula type and can size of the replacement formula.

TIPS FOR INCREASING FORMULA BENEFITS

- Most often used to increase formula for a partially breastfed infant.

- **A Breastfeeding Review is required**.

- Update breastfeeding and formula information on the Health Information screen. (Update the baby's screen first)

- Create a new prescription for the infant to reflect the increase in formula, update mom's prescription as needed.

  - Create the infant's prescription first ("feed the baby first"), then update the mom's prescription as needed ("go see mom")

- You can only increase formula 2 times in a month.

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Void and Reissue Benefits

Use the **Food Instrument List** to Void benefits
Use the **Issue Food Instruments** screen to reissue benefits

Family Issuance Members						Total Items: 2
☑	**Category**	**Participant**	**Certification End Date**	**Jun**	**Jul**	**Aug**	
☑	Pregnant	Olivia R. Jaekel	7/25/2019	1/4	Full	Not Eligible	**Change Rx**
☑	Child	Ashton M. Shaw	7/31/2019	1/4	Full	Not Eligible	**Change Rx**

▼FDTS: 7/22/2019 - LDTS: 7/24/2019   Total Items: 9

Food Category	Subcategory	Quantity	UOM
Juice - 46/48 oz	Juice - All WIC - 12 oz frozen or 46/48 oz liquid	1	CTNR
Breakfast Cereal	Cereal All WIC -hot /cold	24	Ounce
Eggs	Fresh shell eggs	2	Dozen
Fruit & Vegetables Cash Value	Fresh Fruit and Vegetables	$19.00	$$$$
Milk - Fat Reduced	Low Fat Milk (1% fat)	2.25	Gallon
Cheese or Tofu	Cheese	2	Pound
Juice - 64 oz	Juice, ready-to-drink 64 oz	1	CTNR
Bread/Whole Grains	Whole Wheat Bread or Whole Grains	32	Ounce
Legumes	Peanut Butter/Beans All WIC	2	CTNR

▼FDTS: 7/25/2019 - LDTS: 8/24/2019   Total Items: 0

Food Category	Subcategory	Quantity	UOM
Juice - 46/48 oz	Juice - All WIC - 12 oz frozen or 46/48 oz liquid	3	CTNR
Breakfast Cereal	Cereal All WIC -hot /cold	72	Ounce
Eggs	Fresh shell eggs	2	Dozen
Fruit & Vegetables Cash Value	Fresh Fruit and Vegetables	$19.00	$$$$
Milk - Fat Reduced	Low Fat Milk (1% fat)	8	Gallon
Cheese or Tofu	Cheese	2	Pound
Juice - 64 oz	Juice, ready-to-drink 64 oz	2	CTNR
Bread/Whole Grains	Whole Wheat Bread or Whole Grains	48	Ounce
Legumes	Peanut Butter/Beans All WIC	3	CTNR

Use the **Cascades Steps – Void and Reissue Benefits** to guide you

TIPS FOR VOIDING AND REISSUING BENEFITS

- Void benefits as appropriate.

    - Void current benefits when no benefits were used and it's within 7 days of the Family Issuance Day.
    - Void future benefits.

- Create the new food prescription (**only create a new prescription if you can't edit the most current one**).

- Verify all the dates and foods are correct before issuing the replacement benefits.

- You may need to adjust the Issuance Frequency to make sure you reissue only the number of months intended.

CASCADES STEPS – The right tools for the job

These Cascades Steps will guide you through the process

Replace Current Benefits

- Process to replace **food benefits** (not formula) for the current month

Exchange Formula Benefits

- Steps to **exchange current month formula benefits** for a different type of formula

Increase Formula Benefits

- How to **add to the amount of formula issued for the current month**

Void and Reissue Benefits

- Use to **void future month benefits** or replace **current benefits not used and it's within 7 days of the Family Issuance Day**

Cascades Steps are available on the WIC website
Google search WA WIC Cascades for Cascades Steps and more!

ISSUE BENEFITS AT 1 AND 5 YEARS OLD
Tips and Guidance

CASCADES
WASHINGTON WIC

Foods in the month the infant turns 1 year

Participants receive:

- Infant foods when the First Date to Spend is prior to the 1st birthday

- Child foods when the First Date to Spend is on or after the 1st birthday

If the Parent Guardian prefers child foods:

- Staff can issue foods to the other members of the family and <u>wait</u> to issue foods to the child on or after the 1st birthday:
  - **NOTE:** the child's benefits will be prorated if issued more than 7 days after the Family Issuance Day**.**

If infant food benefits were issued and the parent makes the request after the 1st birthday:

- **If no benefits were redeemed for the infant or any member of the family** – void and reissue with the child benefits.

- If **any** member of the family redeemed benefits, staff can't replace the infant formula or foods with child foods.

Foods in the month the child turns 5 years

Eligibility ends date

- Cascades: Eligibility ends the **last day of the month** the child turns 5 years of age

- Client Services: Eligibility ends the last day of the month the child turns 5 years of age

Issuing food benefits

Final certification occurs in Cascades

- Staff can issue benefits on or before the eligibility end date (the last day of the month)

- Staff can't issue benefits when the First Date to Spend is after the eligibility ends date

Final certification occurred in Client Services

- Staff can issue benefits on or before the eligibility ends date (the last day of the month)

Redeeming and replacing benefits

- The participant has the full amount of time to redeem the benefits

- Staff can replace benefits within the First and Last Date to Spend, even if the participant is expired

TROUBLESHOOTING BENEFIT ISSUANCE
Solving common issues

WHAT TO DO WHEN YOU CAN'T ISSUE BENEFITS

Solutions for common issues

Help is available in many forms!

- Cascades Support

- Washington WIC website
  - Staff Tools
  - Cascades Steps

Top solutions from
Troubleshooting Common Issues

CAN'T ISSUE BENEFITS

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Check the **Journal of Transactions** for

- **Certification** - if missing, make sure the **Certify** button was pressed (on the Certification Summary screen)
- **WIC EBT Card Issuance** – displays when staff issue a WIC Card to the family or foster child
- **Foods Prescribed** – press the Save button on the Prescribe Food screen
- **WIC Food Instrument Issuance** – shows benefits were issued

▼ Transaction Criteria

Select Participant or Family	Select Activity	Start Date	End Date
CHILD CERTIFICATION ▼	All ▼	6/18/2019	7/18/2019

Transaction History

Occurrence Date	Activity Description	Participant Name
7/18/2019	Certification	CHILD CERTIFICATION
7/18/2019	Food Prescribed	CHILD CERTIFICATION
7/18/2019	WIC EBT Card Issuance	CHILD CERTIFICATION
7/18/2019	WIC Food Instrument Issuance	CHILD CERTIFICATION
7/18/2019	WIC Food Instrument Issuance	CHILD CERTIFICATION
7/18/2019	WIC Food Instrument Issuance	CHILD CERTIFICATION

CAN'T ISSUE BENEFITS

Check for **Missing Proofs**

The **Certification Summary** screen lists missing proofs

CAN'T ISSUE BENEFITS

Check for *expired* Medical Documentation Forms

- Be sure to enter the correct **Expiration Date**
- The default is one month

Not sure what benefits are issued and available

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The **Shopping List** shows

- What foods are issued to the EBA
- Foods <u>currently</u> available to purchase

Shopping List Remaining Benefits
Washington State WIC Nutrition Program
Date: 06/21/2019

Report Date: 06/21/2019

Family ID: F02700002115
Head of Household: CELERY VEGGIE

Benefit Balance:

Benefit Month	Serial Number	Quantity	UOM	Description
6/21/2019 thru 7/20/2019	2554	$19.00	$$$$	Fruit and Vegetables - Cash Value Benefit
	2554	48	Ounce	Whole Wheat Bread or Whole Grains
	2554	2	Dozen	Eggs - all WIC
	2554	3	CTNR	Peanut Butter/Beans All WIC
	2554	8	Gallon	Milk Reduced Fat or Nonfat All WIC
	2554	2	Pound	Cheese - all WIC
	2554	72	Ounce	Cereal All WIC - hot and cold
	2554	3	CTNR	Juice - All WIC - 12 oz frozen or 46/48 oz liquid
	2554	2	CTNR	Juice - All WIC - 64 oz

> Each time you access the Shopping List it's current to the moment and only shows the foods remaining

By reviewing this training and the Cascades Steps referenced, you've:

- Reviewed tips for issuing a WIC card to families and foster children

- Learned about the Family Issuance Day and proration

- Reviewed the different processes for replacing food and formula benefits

- Compared issuing benefits to participants in the month they turn 1 and 5 years of age

- Reviewed techniques to troubleshoot common issues

Note:

- You won't be able practice all the scenarios in this presentation in the Sandbox (for example issuing WIC Cards and replacing benefits that have been purchased).

- We hope you'll practice all the types of food issuance and replacement that you **can** to become more familiar and comfortable with food issuance in Cascades.

Thank you!

Thanks for all you're doing to prepare for Cascades!

For persons with disabilities, this document is available on request in other formats. To submit a request, please call 1-800-841-1410 (TDD/TYY 711)

Washington State Department of
Health

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