Formula Wizard

The **Formula Wizard** screen displays automatically for the current month on or after the Family Issuance Day (FID) when issuing food benefits for a participant with a food package containing contract or exempt infant formula or WIC Eligible Nutritionals (WEN) that are currently in on-site inventory.
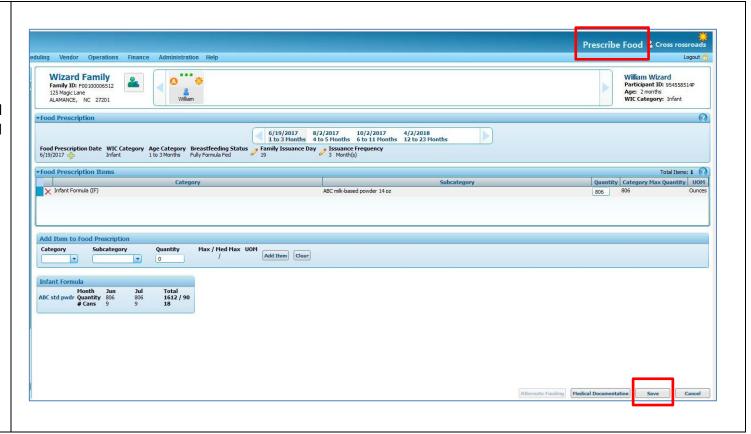
NOTE: Federal Regulations restrict issuance of physical cans of formula before the FID. In addition, the quantity of cans issued from Inventory must not exceed a one-month supply.

This resource includes three scenarios:
1. Issuing formula to an infant receiving a default food package (pages 1-4)
2. Issuing formula to a participant who has special formula ordered from the Nutrition Services Branch (NSB) (pages 5-6)
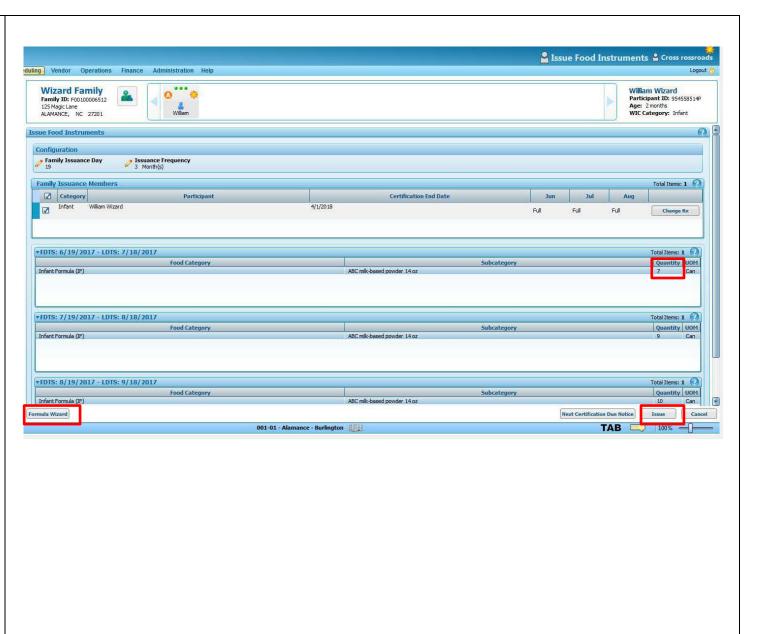3. Issuing formula to a participant who has formula ordered from NSB but has already been issued food (pages 7-9)

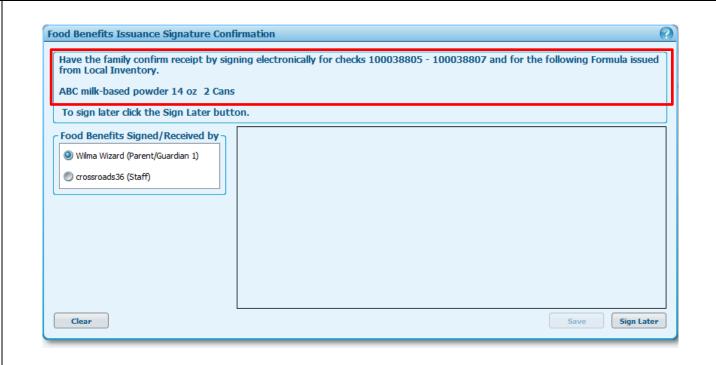|	
Scenario One: Issuing formula to an infant receiving a default food package 1. The user has prescribed a food package on the Prescribe Food screen and clicked the Save button.	

Formula Wizard

2. The **Formula Wizard** appears. 3. Look at **# Prescribed** to see how many cans the infant will receive for the current month (in this case it is 9). 4. Next, look at **# on Hand** (in this case it is 25, the number of cans in Local Inventory).	
5. Decide how many cans to issue from Formula Wizard (in this case 2 cans). 6. Click **Next**.	

Formula Wizard

7. The Formula Wizard closes and the **Issue Food Instruments** screen displays. The formula item displays in the **FDTS-LDTS** grid. Note the number of cans for the current month has been reduced by the number issued from inventory. In this case, there are only 7 cans listed for the first month of issuance instead of 9 cans.

8. If you still need to change the number of cans you want to issue from inventory, you can do so by clicking on the **Formula Wizard** button.

9. When you are ready to issue food benefits, click the **Issue** button.

Formula Wizard

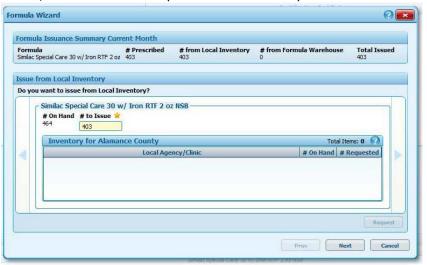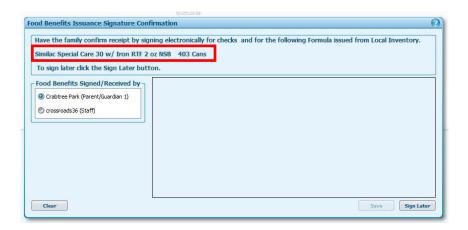|	
10. The Food Benefits Issuance Signature Confirmation displays. This confirmation includes the Food Instrument Numbers issued and the number of cans of formula issued from Local Inventory. 11. Have the family confirm receipt by signing electronically.	
12. The Food Instrument List will show Status: **Redeemed** for the Food Instrument (FI) Number that corresponds with the formula issued from Local Inventory.	

Formula Wizard

Scenario Two: Using the Formula Wizard to issue formula to a participant prescribed special formula that is ordered from NSB. Issuance Frequency is 1 month. In this scenario, the participant is prescribed an exempt infant formula or WIC Eligible Nutritional (WEN) that cannot be redeemed through a WIC Vendor and therefore must be ordered from NSB. Examples include: Enfamil Premature 20 Iron Fortified RTF 2 oz., Pregestimil 20 Cal RTF 2 oz., Similac Special Care 30 w/Iron RFT 2 oz. and Vivonex Pediatric Powder 1.7 oz.

NOTE: **any** formula ordered from NSB and issued through the Formula Wizard or through the Inventory module must be issued **monthly**. Federal Regulations restrict issuance of physical cans of formula to a **one-month** supply.

1. Complete the **Prescribe Food** screen and **Medical Documentation** screen for the participant with a special formula to be ordered from NSB.
2. On the **Issue Food Instruments** screen, change **Issuance Frequency** to 1 month. Any formula ordered from NSB must be issued monthly.
3. Order special formula from NSB. Refer to the WIC Program Manual (WPM) Chapter 7, Section 6 for more detailed guidance.
4. Once the shipment of special formula is delivered to the local agency, add the special formula to the Crossroads inventory. Refer to "Inventory" for more detailed guidance.
5. Contact the family to let them know that the special formula has arrived. Remember to check the Family Issuance Day (FID) and have the family come in ON or AFTER that date. As noted previously, Formula Wizard is not operational prior to FID in order to comply with Federal Regulations.
6. When the family comes into clinic to pick up the special formula, navigate to the **Issue Food Instruments** screen in the participant's WIC record in Crossroads. Click the **Formula Wizard** button on the bottom left of the Crossroads screen.
7. Look at **# Prescribed** to see how many cans the participant should receive (in this case it is 403).
8. Next, look at # on Hand (In this case it is 464). Enter the exact number of cans the participant is prescribed (403) and click **Next**.

Formula Wizard

9. The Formula Wizard closes and the **Issue Food Instruments** screen displays. Click **Issue**.

10. The **Food Benefits Issuance Signature Confirmation** displays. This confirmation includes the number of cans of formula issued from Inventory.

11. Have the family confirm receipt by signing electronically.

12. The **Food Instrument List** will show Status: **Redeemed** for the FI Number that corresponds with the formula issued from Inventory.

Formula Wizard

Scenario Three: Issuing formula to a participant who has formula ordered from NSB but has already been issued food. In these cases the **Formula Wizard** button is greyed out and cannot be used. Example:
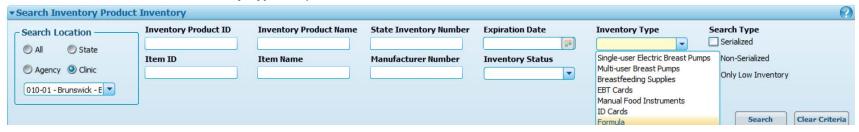
On 2/13, the child was issued 3 months of food benefits: February, March, and April. The child is prescribed food and WEN.

On 4/19, the family comes to clinic to pick up Peptamen Jr. ordered from NSB for the child. The issuance dot for April is blue due to the previous food issuance. Food benefits have been redeemed for the current month so voiding the current month is not an option.

Workaround: Issue to the family through Inventory. Although formula can be issued through Inventory, it is not the best practice. Formula issued through Inventory is not connected to the family's record or participation in Crossroads. Also, issuing through Inventory allows for more than 1 month of formula/WEN to be issued which is against Federal Regulations. Therefore, this method should only be used if the issuance dot is blue for the current month and food benefits have been redeemed. Otherwise, void the current month and use the Formula Wizard and the issuance screen to issue current month benefits to include the formula ordered from NSB. If the local user issues formula through Inventory, it must be limited to a one-month supply. The local user must document the type and quantity of formula issued through Inventory in the participant's Crossroads record.

Steps to Issue Formula through Inventory:

1. Navigate to Operations > Inventory > Search Product Inventory
2. Choose Formula in the **Inventory Type** dropdown menu and click **Search**

3. Find the formula to be issued in the **Inventory Search Results (Products)** list and place a checkmark in the box.
   Inventory Search Results (Items) will display with the formula name, status and quantity.

Formula Wizard

4. Place a checkmark in the box next to the formula in the **Inventory Search Results (Items)** with a Status of On Hand. This will enable the **Issue** button. Click **Issue**.
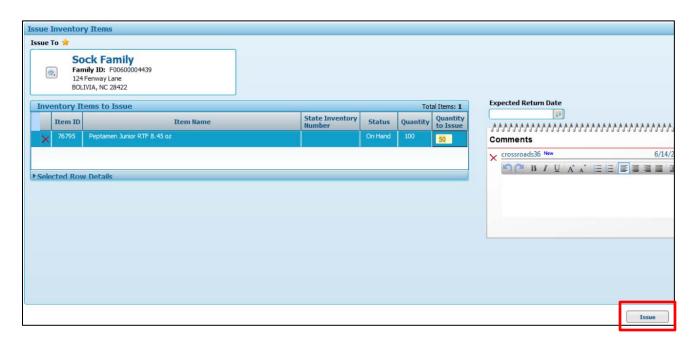

5. The **Issue Inventory Items** screen will appear. Click the **Lookup Family** button and search for the participant to be issued formula.

6. Double click on the participant's name in the **Search Results** container.

Formula Wizard

7. Enter the Quantity to Issue (**no more than** one month of issuance) and click the **Issue** button

8. User will receive the status message: "Inventory Items were successfully issued."

9. Return to the participant's Crossroads record and document the type and quantity of formula issued through Inventory in the Care Plan.