

Issuing Food Instruments

Policy

USDA Federal Regulations: 246.7(c)(2)(i) The State or local agency must check the identity of participants, or in the case of infants or children, the identity of the parent or guardian, or proxies when issuing food, cash-value vouchers or food instruments.

246.12(r) Issuance of food instruments, cash-value vouchers and authorized supplemental foods. The State agency must: (1) Parents/caretakers and proxies. Establish uniform procedures that allow parents and caretakers of infant and child participants and proxies to obtain and transact food instruments and cash-value vouchers or obtain authorized supplemental foods on behalf of a participant. (2) Signature requirement. Ensure that the participant, parent or caretaker of an infant or child participant, or proxy signs for receipt of food instruments, cash-value vouchers or authorized supplemental foods, except as provided in paragraph (r)(4) of this section; (3) Instructions. Ensure that participants, parents or caretakers of infant and child participants, and proxies receive instructions on the proper use of food instruments and cash-value vouchers. The State agency must also ensure that participants, parents or caretakers of infant and child participants, and proxies are notified that they have the right to complain about improper vendor, farmer, farmers' markets, and home food delivery contractor practices with regard to program responsibilities; (4) Food instruments and cash-value voucher pick up. Participants, parents and caretakers of infant and child participants, and proxies may pick up food instruments and cash-value vouchers in person or the State agency may provide for issuance through an alternative means such as EBT or mailing, unless FNS determines that such actions would jeopardize the integrity of program services or program accountability. State agencies that opt to mail food instruments and cash-value vouchers must establish and implement a system that ensures the return of food instruments and cash-value vouchers to the State or local agency if a participant no longer resides or receives mail at the address to which the food instruments and cash-value vouchers were mailed; and (5) Maximum issuance of food instruments and cash-value voucher. Ensure that no more than a three-month supply of food instruments and cash-value vouchers or a one-month supply of authorized supplemental foods is issued at any one time to any participant, parent or caretaker of an infant or child participant, or proxy.

246.7(f)(2)(iv) Each local agency using a retail purchase system shall issue a food instrument(s) and if applicable cash-value voucher(s) to the participant at the same time as notification of certification. Such food instrument(s) and cash-value vouchers shall provide benefits for the current month or the remaining portion thereof and shall be redeemable immediately upon receipt by the participant. Local agencies may mail the initial food instrument(s) and if applicable cash-value vouchers with the notification of certification to those participants who meet the criteria for the receipt of food instruments through the mail, as provided in §246.12(r)(4).

246.7(b)(2)(ii)(D) Advise participants or their caretaker, when appropriate, that the supplemental foods issued are only for their personal use. However, the supplemental foods are not authorized for participant use while hospitalized on an in-patient basis.

246.4(a) Requirements. By August 15 of each year, each State agency shall submit to FNS for approval a State Plan for the following fiscal year as a prerequisite to receiving funds under this section. A complete and approved Plan shall include: (27) The State agency's policies and procedures for preventing conflicts of interest at the local agency or clinic level in a reasonable manner. At a minimum, this plan must prohibit the following WIC certification practices by local agency or clinic employees, or provide effective alternative policies and procedures when such prohibition is not possible:

(iii) One employee determining eligibility for all certification criteria and issuing food instruments, cash-value vouchers or supplemental food for the same participant.

Authority

7 CFR Part 246.7(c)(2)(i)*excerpt*

7 CFR Part 246.12(r)(1-5)*excerpts*

7 CFR Part 246.7 (f)(2)(iv)

7CFR Part 246.7(b)(2)(ii)(D)*excerpt*

7 CFR Part 246.4(a)(27)(iii)*excerpt*

Procedures

If the certification is done while the participant(s) are still in the hospital the benefits will not be issued until the participant calls the agency and notifies them that they have been discharged.

The data system does not allow the issuance of retroactive benefits.

The staff person who determines income eligibility cannot be the same person who determines the medical or nutrition risk, but either person can issue the benefits. In WIC clinics this will be accomplished through the following process:

- One staff person determines income eligibility;
- a different staff person (CPA) determines nutrition risk eligibility and certifies the participant (Certification Panel);
- and either staff member issues the eWIC card, issues benefits to the eWIC account, and obtains a signature of receipt of benefits.

Note: When the above process cannot be achieved due to extreme circumstances, see Separation of Duties in Extreme Circumstances policy.

Issuing benefits at different types of WIC appointments:

At certification/recertification
Review benefits to be issued on the food benefit panel to assure accuracy.
Issue benefits and ask the parent/guardian/participant to sign the signature pad.
Carefully review the issued benefits to verify the correct items were issued.
Provide the family with the eWIC card and a list of local vendors who will accept WIC FIs. (if applicable)
Schedule the next appointment(s).
At Nutrition classes
Ask for the identification and verify with the participant that no changes are needed with the food package.
Open the class appointment and record status as “Attended.” Direct individuals to the waiting area until the class begins.
When class begins, open the family records, review benefits to be issued to assure accuracy on the food benefits panel and issue food benefits. When prompted for a signature, put a check in the No Signature Available box and select the reason “NE Class”, then click “close”. .
Carefully review the food benefits to verify the correct items were issued.
When class is over open the class in scheduler, click on a participant name in each family. This will enable the “Signature” button above the table. Obtain their signature and schedule their next appointment(s) as needed. Do this for each family who attended the class.
At Other appointments
Ask for the identification. Mark the appointment as arrived. Direct the individual to the waiting area until they are called for their appointment.
After the appointment has been completed either the CPA or the support staff will review benefits to be issued on food benefit panel to assure accuracy.
Issue benefits and ask the parent/guardian/participant to sign the signature pad.
Carefully review the issued benefits to verify the correct items were issued.

Schedule the next appointment(s).
For appointments done via teleWIC
Follow the same steps as indicated in the above directions but when the system asks for a participant signature, put a check in the No Signature Available box and select the reason “teleWIC”, then click “close”.

A WIC staff person who has also been certified eligible to receive WIC benefits may not issue food benefits for their own household.

WIC food benefits can be issued without a participant physically present in **some** situations.

- If clinic is cancelled for reasons out of the local agency’s control (e.g. inclement weather or a catastrophe) then issue the benefits each participant would have received if they had come to claim them.
- If a scheduled teleWIC appointment has been completed, then issue the benefits each participant would have received if they had **an in person appointment**.
- If the participant has received a formula change and agency staff has received the required documentation and spoken with the parent/guardian, **then reissue the benefits they already have for the new product and/or** issue the benefits the participant would have received if they had come to claim them.
- If the parent/guardian/participant has an adequate reason for their inability to appear in clinic AND rescheduling the appointment, **doing the appointment as a teleWIC appointment** or designating a proxy are not feasible or reasonable actions, then issue one month of benefits AND schedule an appointment for the following month when the remaining benefits can be issued.

When issuing **reissuing** benefits **and the participant is not present**, mark the “No Signature Available” check box in the Signature Capture to User pop-up. Select the appropriate reason from the drop down **list**. This documents in the data system that benefits were issued without the participant present and the reason for issuance.

Issuance of and Replacement eWIC cards:

- Participants can come to a clinic or agency office and show identification in order to receive their new or replacement eWIC card. Or, if they choose
- their new eWIC card or a replacement card can be mailed to them after providing identification electronically.

Agencies will use their own agency envelopes for the mailing of eWIC cards. These envelopes

must have this statement: Return Service Requested (Do not cover this statement with labels or stickers.)

Reissuing benefits:

Benefits can be reissued with the same food package or with a new food package. Benefits may need to be reissued in the following situations:

- A food package change,
- Lost or stolen FIs (see **Lost or Stolen Food Instruments policy**), and
- When a foster parent cannot retrieve the initial FIs from the birth family or a previous foster family.

Follow the steps below to reissue benefits with the old food package.

- Click on the Food Benefits branch.
- Click on Adjust Benefits.
- Make sure the appropriate months FI's checkboxes are selected and remove those you do not want to be issued.
- Click on the Issue Benefits button, to issue benefits.
- Ask the parent/guardian/participant to sign the signature pad.
- Carefully review the food benefits print out to verify the correct items were reissued.

Follow the steps below to reissue benefits with a new food package.

- Create the new food package and verify it.
- **Go to the Food Benefits panel and** review the quantity to be issued in **the Economic Unit Balance-to-Issue pop-up box**. If correct, click Issue Benefits from within the pop-up box or click cancel to verify the correct months are checked for **reissuance and then click Issue benefits from the Food Benefits panel**.
- Ask the parent/guardian/participant to sign the signature pad.
- Carefully review the food benefits print out to verify the correct items were reissued.

There are times when the food benefit amount may need to be adjusted for a household.

Examples of when this may occur are as follows:

- Participant disqualification or
- Child removed from a family (example: A child is placed in foster care.)

The EU Balance-to-Issue pop-up box needs to be used to ensure the food benefit amount is adjusted appropriately for a household and to prevent the purchase of WIC foods.

- On the Food **Benefits** panel, select "Adjust Benefits".
- If the EU Balance-to-Issue box **appears**, make adjustments as needed in the Quantity to Be Issued column, then click "Issue Benefits", if not, **uncheck the boxes next to the participant's name(s) for the month(s) you are wanting to remove the benefits from.** (Clicking "Issue Benefits" will rewrite the food benefits issuance with the appropriate

food quantity changes made.)

Best Practices

Three months of benefits are generally issued to each participant. However, clinic personnel can adjust the issuance cycle to one or two months based on individual needs.

Because of potential mail delays, best practice would be that the participant comes in person to receive their eWIC card or replacement card. WIC staff should explain to participants that it can take several days to receive the eWIC card in the mail and that if they come in person, they will be able to use it right away.