

Local Agency Formula Warehouse Process

A. PURPOSE OF PROCEDURE:

The following is a standardized process for local agency staff needing to order an exempt infant formula and/or medical nutritional product for a specific WIC participant that is unavailable, or otherwise difficult to obtain, through a retailer, including special purpose vendors, within a reasonable distance of where the participant lives.

B. SCOPE OF THE PROCEDURE:

This process should only be used when a special formula or medical food is needed and not available at WIC approved grocery or pharmacy retail locations within the WIC participant's local community. If the product is not currently in Focus, local agency staff must first confer with their state WIC consultant.

All correspondence related to special formula warehouse orders should be done through the WICHD@hhs.iowa.gov email account.

Limitations of the procedure include:

- Product orders must be fulfilled within the benefit period redeemed to remain consistent with Federal Regulations. Local agencies are responsible for notifying the State Office of any damages, errors or shipments not delivered. Notification must be provided to the State Office more than 4 business days prior to the end of the month. DO NOT directly email your assigned consultant.
- Remote product orders must adhere to the same requirements as WIC Online Ordering, as this process is a form of online ordering. Participants must take possession of product during the month of benefit redemption.
- Local agencies are responsible for notifying the State Office via WICHD@hhs.iowa.gov for any formula not received or damaged upon receipt. DO NOT directly email your assigned consultant.
- New orders **MUST** be submitted to the state no less than 5 business days prior to the end of the month to be ordered that month. Any orders requested with less than 5 business days left in the month will be reviewed by the State Office and determinations will be made at that point. If submitted 5 business days or less from the end of the month, the new order will start the following month.

C. GENERAL PROCEDURE:

Below are the steps for formula warehouse orders that local agency staff will use to place both new orders and recurring orders.

Step **ACTION**

1	New Orders - Create the appropriate food package and issue the benefits to the participant.
2	Document in the participant's record that the product is being ordered through the formula warehouse.
3	<p>Local agency staff must email the monthly formula orders or participant status updates to the State Office via WICHHD@hhs.iowa.gov including the following required information:</p> <ul style="list-style-type: none"> • Agency number • FID • EU number • PID • PAN • Product name (and flavor if applicable) • Form • Size • Quantity needed • UPC, if known • Agency or clinic address for shipping • Any specific notes (recurring order, skip a month, etc) <p>Note: Allow <u>2-3 business days</u> to process all new orders.</p> <p>All recurring orders are due by the 25th of each month or the 1st business day after the 25th.</p> <p>Best practice is to have one main contact for each local agency to submit orders and issues. Also, there is a standard excel file to place orders with all the required fields included, upon request.</p>
4	Instruct the participant that they are not to try and purchase the product anywhere, that the product will be ordered and shipped to the local agency and that WIC staff will be contacting them to make arrangements for pick up once it arrives.
5	<p>Once the local agency receives the formula, inspect it to ensure that the correct formula has been delivered, the product is not expired, and the packaging has not been opened, damaged or tampered with. Notify the State Office of any product not received, damaged, or any other errors within 2-3 business days. The State Office must be notified via email at WICHHD@hhs.iowa.gov when all orders are received.</p> <p>Best practice is to have 1 centralized location to receive formula orders each month.</p>

	Best practice would be to scan the packing slip received with the shipment into the participant's record.
6	Notify the participant and make arrangement for the formula to be picked up at the local agency or local agency clinic location. (In the meantime, ensure the formula is stored in a safe and secure manner.)
7	Once the participant picks up the formula, document in the care plan the participant has received the formula.
8	Going forward, follow your local agency's normal policy and protocol for participant scheduling and benefit issuance.
9	Recurring Orders - Local agency staff must send email notification of any changes (PAN, quantity, shipping address) or cancellations to an existing order by email to WICHD@hhs.iowa.gov 3 business days prior to the end of the current month, for the next month's order. If the local agency has multiple office locations and/or subcontractors, all orders must be rolled up in one email to the State Office. If no email is received, the State Office will place orders for any recurring order if there is issuance for the product in the family's benefit balance, as verified in WIC Direct. It is very important that you notify the State Office if the participant is no longer in need of the formula, ages out, formula is not being picked up or for any other changes associated with the order. (Note: benefits must be issued to the participant for the State Office staff to place the order.) If no benefits were issued 3 business days before the end of the month, the State Office will assume the recurring order is canceled.
10	Recurring Orders - Agencies are responsible for reassessing local availability of special formula or medical foods with local vendors at a minimum every 3 months for all recurring orders.