## 3.09 Remote Benefit Issuance

**POLICY:**

West Virginia recognizes that remote services have become foundational to offering a modern WIC experience to participants. Food benefits can be issued remotely to the eWIC card to ensure certified individuals can access Program benefits in a straightforward and timely manner, as well as reduce the administrative burden at the state and local levels while ensuring program integrity measures are in place.

If physical presence is waived for an initial or subsequent certification appointment with the required documentation from the participant's healthcare provider (see **Policy 2.01 Certification of WIC Participants**), food benefits can be issued to the eWIC card.

*Note:* The issuing WIC staff must confirm food benefits were issued correctly to ensure benefits were not under-issued or over-issued, and/or to protect against fraud.

**PROCEDURE:**

### A. Remotely Issuing eWIC Benefits to an Individual Participant or Family

Staff may issue eWIC benefits without the participant's, parent's, guardian's, or caretaker's presence in clinic as outlined below:

1. Partial In-Person Certification Appointments

    a. Local Agency (LA) staff checks the Crossroads account to see if a family has signed the Remote Services Acknowledgement Form (RSAF) (see **Policy 2.01 Certification of WIC Participants**) and WVHIN Authorization Release of Health Information (ARHI) (see **5.16 WVHIN – Authorization for Release of Health Information Form**) for participant(s) that have appointment(s).

    b. If a participant doesn't have RSAF and ARHI forms, staff will send forms via email from DocuSign, respectively. If the participant has completed forms, anthropometric/hematological data will be looked up in WVHIN within 48 hours of the appointment date.

    c. If physical presence is established in person, intake will include the participant signing the participant agreement and obtaining anthropometrics/hematological data. The participant/parent/guardian completes the nutrition assessment with CPA within the same day via Google Meet or FaceTime. An appointment could be completed via phone if no other virtual options are available.

    d. Staff must verify the food package on the Food Prescription Screen of Crossroads and issue benefits to the eWIC benefit card. Staff will sign

their full name with the notation “RBI” for “Remote Benefit Issuance,” as the reason for signing.

2. Emergency Waiver Remote Appointments

   a. Complete appointment by phone/video platform and obtain anthropometrics within 60 days of certification (see **Policy 2.22 Emergency Certifications and WIC Operations**)

   b. Local Agency(LA) checks Crossroads account to see if they have on file a Remote Services Acknowledgement Form (RSAF) and WVHIN Authorization Release of Health Information (ARHI) for the participant that has the appointment.

   c. Staff will contact the participant(s) 3 days before the appointment to request that the participant contact their healthcare provider to send any current measurements or hemoglobin levels. Offer for an in-person visit to collect that data if not available.

   d. Participant email, text or submit via the Crossroads Participant Portal or clinic email proof of identification, residency, and income.

   e. Participant agreement will be sent to the participant or parent/guardian/caretaker via email from DocuSign. It must be signed by the participant or caregiver before the participant is certified.

      1. If the participant doesn’t have RSAF and ARHI forms, staff will send forms through email via DocuSign. If the participant has completed forms, anthropometric/hematological data will be looked up in WVHIN.

   f. If there is no anthropometric/hematological data provided at the certification appointment, mark physical presence as “NO” on participant demographic screen and select 60-day deferral. If the participant is present for weight and height, but does not get hemoglobin (Hgb) screening completed at the time of appointment, select ‘60-day deferral’ on bloodwork screen. (See **Policy 2.13 Hematological Testing**), Participants have within/up to 90 days after certification to obtain hematological data.

   g. At appointment, let the Parent/Guardian/Caretaker know that we “need

anthropometric within 60 days and hematological data within 90 days" and options for getting that data to each LA. Three months of benefits should be issued once the appointment is complete, with or without any anthropometric/hematological data. The nutritionist will schedule the next appointment as an in-person visit for measurements by selecting "30 day Hemo/Anthro" in the XR schedule.

h. If there is no data available, the nutritionist will schedule another appointment 30 days later as a "60 day Hemo/Anthro."
If no data is obtained, benefits will not be withheld for the remainder of the certification period.

i. Staff must verify the food package on the Food Prescription Screen of Crossroads and issue benefits to the eWIC benefit card. Staff will sign their full name with the notation "RBI" for "Remote Benefit Issuance," as the reason for signing.

3. Completion of a West Virginia (WV) WIC web-based nutrition education (JPMA WIC Smart) module (see **Policy 5.05 Nutrition Education Contacts and Documentation**).

    a. The local WIC office may receive proof of completion of the WV WIC web-based nutrition education contact (see **Policy 5.05 Nutrition Education Contacts and Documentation)**. However, staff may not deny benefits due to a participant's failure to complete online nutrition education.

    b. Staff must attempt to contact the participant, parent, guardian, or caretaker to verify the food package and to notify them that food benefits have been added to their eWIC benefit card. Staff must confirm contact information and the next appointment.

    c. Staff will document completion of the nutrition education contact in Crossroads and issue benefits to the eWIC benefit card. Staff will sign their full name with the notation "NE" for "Nutrition Education", as the reason for signing.

4. Completion of a one-on-one nutrition education contact via telephone. (see **Policy 5.05 Nutrition Education Contacts and Documentation).**

    a. Staff will attempt to verify the food package with the participant, parent, guardian, or caretaker.

    b. Staff will document completion of the nutrition education contact in Crossroads and issue benefits to the eWIC benefit card. Staff will sign their full name with the notation "NE" for "Nutrition Education" as the

reason for signing. Nutrition Education completion documentation only occurs when Nutrition Education occurs.

5. Mid-Certification and/or Follow-Up Appointment

    a. The breastfeeding woman, infant, or child must complete a mid-certification appointment. During a mid-certification appointment, staff should review the food package, perform health and nutrition evaluation, complete height and weight measurements, offer nutrition counseling or education, provide necessary referrals, assess immunization status, and deliver breastfeeding support and promotion.

    b. If there is no anthropometric data provided at the mid-certification appointment, mark physical presence as “NO” on the participant demographic screen. When anthropometric data is obtained, three months of benefits should be issued.

    c. If it is not possible to complete the appointment at that time or contact is unsuccessful, staff will issue one (1) month of benefits and will schedule a follow-up appointment (as a ‘Mid-Certification’ appointment within XR) within one (1) month. At the next contact (appointment), complete the appointment; then staff will issue two (2) months of benefits. The next appointment will be a Nutrition Education appointment, which should be scheduled when benefits are issued.

    d. Staff will document completion of the mid-certification appointment and the reason the appointment and/or eWIC benefit issuance were completed remotely in the **Crossroads Nutrition Care Plan**. Staff will sign their full name with the notation “RBI” for “Remote Benefit Issuance,” as the reason for signing.

6. Minor food package changes that would require the return of any contract infant formula, exempt infant formula, or WIC-eligible nutritionals.

    a. The parent, guardian, or caretaker must request food package changes, and a Nutritionist/Nutrition Associate (CPA) must prescribe them.

    b. Staff must attempt to contact the participant, parent, guardian, or caretaker to verify the food package and to notify them that food benefits have been added to their eWIC benefit card.

    c. Staff will issue benefits to the eWIC benefit card. Staff will sign their full name with the notation “RBI” for “Remote Benefit Issuance” as the reason for signing.

7. Other reasons that staff may issue eWIC benefits without the participant's, parent's, guardian's, or caretaker's presence in clinic include, but are not limited to:

    - Physical disability or a family with children with special health care needs
    - Illness
    - Imminent childbirth
    - Quarantine, communicable disease, and/or immune disorder
    - Inclement weather conditions
    - Distance to travel, other travel challenges, or transportation
    - Education requirement met, and the participant will not be eligible for re-certification
    - Participant is unable to keep the appointment, which would result in missing an entire month of benefits
    - Not responding to remote service delivery option (ie., call or video visit) following attempted phone contact after a missed scheduled appointment

    a. Staff must attempt to contact the participant, parent, guardian, or caretaker to verify the food package and to notify them that food benefits have been added to their eWIC benefit card. Staff must confirm contact information and the next appointment.

**B. Group Electronic Benefits Issuance**

1. In situations where it is necessary for staff to do group electronic benefits issuance, one (1) month of benefits will be issued, and the appointment will be rescheduled. Justification for group benefit issuance includes, but is not limited to:

    a. Seasonally inclement weather or site closure;
    b. Extreme hardship that may be encountered by the target population;
    c. Event of a natural disaster, environmental hazard or destructive incident (i.e. gas line explosion, water main break); and
    d. Automated system failure, internet disruption or electrical problems that prohibit the issuance of food benefits on a given day.

2. Staff must attempt to contact the participant, parent, guardian, or caretaker to verify the food package and to notify them that food benefits have been added to their eWIC benefit card.

3. Staff will issue benefits to the eWIC benefit card. Staff will sign their full name with the notation "RBI" for "Remote Benefit Issuance" as the reason for signing.

    a. The Nutritionist/Nutrition Associate (CPA) will note the "Remote Benefit Issuance" reason in the Nutrition Care Plan.

4. Group food benefits issuance will be discontinued as soon as the reason for the group benefit issuance is resolved.

Note: If applicable, staff will encourage the downloading and usage of the WIC Shopper App, the EBT processor-provided IVR automated telephone system, and/or Crossroads MIS Participant Portal.

## C. Missed Appointments

1. Nutrition Education appointments

    a. Staff shall stress the positive, long-term benefits of nutrition education and encourage the participant to attend and participate in nutrition education activities. However, individual participants shall not be denied supplemental foods for failure to attend or participate in nutrition education activities.

    b. If the participant has missed their scheduled contact, staff will attempt to contact the participant or parent/guardian once. If contact is made, staff will attempt to complete the appointment while on the phone, document the education, and issue three (3) months of benefits. If it is not possible to complete the appointment at that time or contact is unsuccessful, staff will issue three (3) months of benefits. The next appointment will be a Mid-Certification or Certification appointment, which should be scheduled when benefits are issued. If the Nutrition Education contact is unsuccessful, staff will mark as “unsuccessful” at the bottom of the screen on the Crossroads Nutrition Education Screen.

2. Mid-Certification/Follow-Up appointments

    a. If the participant has missed their scheduled appointment, staff will contact the participant or parent/guardian once. If contact is made, staff will attempt to complete the appointment while on the phone, document and issue three (3) months of benefits. Let the Parent/Guardian/Caretaker know that we “need anthropometric measurements within 60 days” and options for getting that data to each LA.

    b. If it is not possible to complete the appointment at that time or contact is unsuccessful, staff will issue one (1) month of benefits and will schedule a follow-up appointment (as a mid-certification appointment within XR) within one (1) month. At the next contact (appointment), complete the appointment; then staff will issue two (2) months of benefits. The next appointment will be a Nutrition Education appointment which should be scheduled when benefits are issued.

3. Rescheduling

    a. A participant who misses an appointment, either as a no-show or who cancels and/or reschedules, may be given an additional appointment. If a second appointment is missed, the program's processing standards

obligations have been fulfilled. The only exceptions will be for documented personal or natural disasters e.g. a death in the family or hazardous weather.

**REFERENCES:**

1. WIC Regulations 246.12, Food Delivery Systems
2. WIC Regulations 246.14, Program Costs
3. February 1, 2023 WIC Memo: Additional WIC Flexibilities to Support Outreach, Innovation, and Modernization Efforts through ARPA Nationwide Waivers - Supporting Remote WIC Operations
4. WIC Regulations 7 CFR 246.11 Nutrition Education (a)(2)
5. March 17, 2022 WIC Memo: Benefit Issuance and Temporary Certifications
6. October 19, 2023 WIC Memo: Service Delivery Redesign Framework