

3.16 Special Formula Distribution System

POLICY:

Special formula will be provided by the State contracted distribution center. The distribution center will ship requested special formula to either the Local Agency clinic or the participant's home considering which one is more appropriate.

DEFINITIONS:

Out-of-Date Formula: Formula is considered out-of date on the first day of the month labeled as the expiration date.

PROCEDURE:

A. Local Agency Determination of Special Formula Need

The Local Agency will determine:

- Participant eligibility to receive special formula;
- Quantity and type of special formula to be issued to the participant;
- < Review whether formula is to be issued to the EBT card or the CAP Warehouse from the Food Package Reference Guide;
- Location to which special formula will be shipped.

B. Local Agency Special Formula Order

The Local Agency Staff will:

- Order the CAP Warehouse order through the Formula wizard button on the Crossroads Food Issuance Screen;
- Ensure the WIC 53 is completely filled out and that it has not expired;
- Obtain the participant's signature on all formula food benefits issued to the participant;
- Determine if the formula is to be shipped directly to the client's physical address or clinic;
- Will scan the WIC-53 into Crossroads on the Food Prescription Screen.

C. Special Formula Shipment to Participant's Home

1. When formula is sent to participant's home, the distribution center **must have a physical address (not a Post Office Box)**. A physical address **must** be documented in Crossroads for that participant. For special formula **only**, a rural route and box number is permissible as a physical address in Crossroads.
2. Local Agency clinic staff should inform the participant when to expect delivery. This will normally be 2-4 business days after the order is placed.
3. The participant should be instructed that if the order is not received within **five (5) business days**, the Local Agency clinic should be contacted. The clinic will then contact the distribution center to trace the order. **Do not give the distribution center phone number to the participants.**

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4. Instruct the participant that should the need for special formula change or be discontinued, they must immediately notify the Local Agency and return the unused portion of the discontinued formula before receiving food benefits for a new formula.
5. Unused returned formula must be entered into the Crossroads System Inventory and also recorded on the Formula Tracking Form.
6. Notify the participant that if formula is out-of-date when received from the warehouse, they should return it to the Local Agency clinic for replacement.

D. Special Formula Shipment to Local Agency Clinic

1. The special formula will be delivered to the Local Agency clinic when it is not feasible to send it to the participant's home.
2. The participant may either contact the clinic when the product is due in (normally 2-4 business days after the order is placed) prior to picking it up or have clinic staff call when the product has been received.
3. Instruct the participant that should the need for special formula change or be discontinued they must immediately notify the Local Agency and return the unused portion of the discontinued formula before receiving food benefits for a new formula.
4. Unused returned formula must be entered into the Crossroads System Inventory and also recorded on the Formula Tracking Form.

E. Damaged/Broken or Out-Of-Date Formula

1. Call the distribution center before placing a request for replacement, (717)293-0187x0.
2. Client must return formula to the clinic for disposal and reissuance. Photographs maybe used for severely damaged formula that is not easily brought into the clinic. The returned formula must be entered on the Formula Tracking Sheet.
3. The WIC Help Desk must be called for replacement. They will replace the damaged formula thru Crossroads and make a family alert stating that the formula was replaced.
4. Once documentation is completed, the labels on the infant formula should be removed and destroyed. The damaged or out-of-date special formula must then be discarded/destroyed.
5. The Distribution Center will also track damaged formula from the shipper to insure that double reporting does not occur.

F. Replacement of Special Formula

1. Special formula will only be replaced for the following reasons:

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If formula is changed by the physician (providing the participant supplies a **Prescription Formula Documentation Form, WIC-53**) between cycles. The participant must return any unused formula prior to replacement issuance.

If formula is damaged or out-of-date; or

Non-receipt of initial order. In this case the replacement order and all future orders must be sent to the clinic site.

2. Instruct the participant that should formula need to be replaced for any of the above reasons, they must notify the Local Agency and return unused formula to the local clinic before new formula can be ordered. This must be tracked on the Formula Tracking form and non-damaged and out-of-date formula must be entered into Crossroads inventory.
3. The clinic site must contact the WIC Help Desk for replacement.

G. Usage of Returned Special Formula

1. Special formula that is returned by a participant or is not needed once received from the Distribution Center can be issued to another participant. The returned formula is to be entered into the inventory within Crossroads.
2. To issue the returned formula to another client, the clinic staff will issue the formula from inventory within Crossroads on the food issuance screen. If there is not enough to fill the entire month, the remainder can be ordered thru the warehouse through the formula wizard.
3. If the product will go out of date within ninety (90) days, or if usage of the formula at the Local Agency is considered unlikely, notify the Help Desk and they can assist in finding another area that the formula may be used.
 - a. The Local Agency, with the formula (sending Agency), will arrange with the appropriate Local Agency, needing the formula (receiving Agency) to ship the formula to that Local Agency, clinic site, or participant.
 - b. The sending Local Agency will contact the shipper and incur shipping costs.
The State Agency may be invoiced for shipping cost incurred.
 - c. The receiving site will issue a request to transfer the formula from the original site through Crossroads. If they are in a different Local Agency, contact the WIC Help Desk staff for assistance.

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H. Distribution Center Processing of Orders

1. The Distribution Center will determine if requested product is in stock.
2. **Distribution Center processing deadline for a business day will be 2 PM. The Distribution Center will process and ship all requests received within one business day of receipt.**
3. If the product is not currently available from the warehouse, the Local Agency will contact the West Virginia State WIC Office. If the West Virginia State WIC Office approves, they will approve the authorization to the Distribution center to purchase the product. The Distribution Center staff will special order the product from the manufacturer, in a quantity equal to two (2) times the requested order. Special shipping will be authorized to expedite this process. The Local Agency clinic site which ordered the product will be notified by telephone of the expected arrival date.
3. If the product is normally stocked by the Distribution Center but is temporarily out of stock, the Distribution Center staff will research when and if the product has been ordered from the manufacturer.
 - a. If the product has not been ordered, it will be ordered from the manufacturer.
 - b. If the product has been ordered and is due in, the Distribution Center staff will contact the manufacturer for an expected delivery date and then notify the Local Agency clinic.
 - c. If under any circumstances a special formula is determined to be out of stock from the manufacturer, the Distribution Center staff will notify the Local Agency clinic as soon as possible that the product is out of stock and when it is expected to become available from the manufacturer.

I. Distribution Center Processing of Non-receipt of Shipped Special Formula

1. When the Distribution Center is notified by the Local Agency clinic of non-receipt of formula, the Distribution Center will pull the shipping information and trace the shipment through the carrier. The Local Agency clinic will be notified of the status of the order as reshipment must be sent to them, not the participant.
2. The Distribution Center will reconcile the original shipment with the shipper either through reimbursement, if the shipment was lost, or return of the shipment, if held for contact by participant due to unsuccessful delivery attempt.
3. The WIC Help Desk Staff will assist the clinic in reordering the formula.
4. If there are more than one instance of lost or stolen packages, the participant will be required to pick up their formula at the clinic.

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J. Maintenance of Documentation

1. The Local Agency clinic will maintain a copy of the Formula Tracking Log,
2. The WIC Help Desk will keep a record of all formula replacements due to damaged, out-of-date formula and lost orders.
3. The Distribution Center will maintain the following documentation:
 - All formula orders to the manufacturers;
 - All shipping receipt documents from the manufacturers;
 - All shipping information for shipments of formula sent by Distribution Center.

K. State Agency Responsibilities

1. The Distribution Center staff will be made aware of any problems or concerns relating to the operations of the special formula Distribution Center.
2. The State Agency will maintain a special designation for the Distribution Center which will allow processing of the CAP Warehouse Payments.

L. Reconciliation

1. Payment records must be reconciled with issuance files on a weekly basis.
2. Pending orders will be processed and received twice weekly.
3. Clients are required to report lost or stolen food items within 5 days of issuance.

REFERENCES:

1. Pennsylvania Department of Health, WIC Policy and Procedure Number 4.05, effective 2022.
2. Prescription Formula Documentation Form (WIC-53)

ATTACHMENTS:

1. Special Formula Warehouse Order Tracking Form.