

Ordering Instructions for Products Not on Retail Shelves (December 2011 revision)

POLICY:

Local Agency WIC staff may special order exempt infant formulas and WIC-eligible medical foods when a special formula is not locally available within the required time or in the quantities needed, or is excessively priced. No more than one month's issuance of special formula may be ordered at a time. Ward Road Pharmacy is the Colorado WIC Program's primary retailer for special formulas.

Procedures to issue Food Instruments (FIs) and order/receive special formulas for participants with special nutritional needs require modification from those established for routine food benefit issuance.

One necessary modification: WIC FIs for special formulas may be printed immediately prior to creating and emailing the special formula order to State Office. Once printed, these FIs must be maintained in a secure place accessible only to WIC staff until the participant/endorser/proxy picks up the formula at the WIC clinic and the FIs are forwarded to Ward Road Pharmacy as payment.

A second necessary modification: When Ward Road Pharmacy sends special formula to the WIC clinic and this formula is not picked up by the endorser/participant/proxy, WIC staff signs their own name to the FIs and mails them to Ward Road Pharmacy for payment purposes.

PROCEDURE:

Perform the following steps when a prescription is approved for a new participant or for a reoccurring order:

1. **Prior to placing the special formula order, local agency WIC staff is responsible to ensure (within reason) that the formula is the correct issuance for that month and will be picked up by the endorser/participant.**
2. **Print the food instruments (FIs)** at the proper time so that the FIs specify the correct amount of formula.
 - a. In order to print a full month's issuance in Compass, printing must occur between the last few days of the previous month and before the 10th day of the issuance month. Proration occurs when FIs are printed after the 10th day of the issuance month. In Compass, it is not necessary to bring the participants/endorser in during the first 10 days of the month. Their appointment schedule need not be disrupted as long as FIs are printed within the time frame specified above. When feasible, print the next month's FIs at the same time the endorser is picking up the current month's formula.
 - b. When the endorser/participant is present during the check printing, capture her signature on the signature pad to acknowledge issuance of the FIs. When the endorser/participant is not present, WIC staff clicks the "No signature available" checkbox.
 - c. Maintain the next month's FIs in a secure place accessible only to WIC staff.

3. **Create one email order per participant.**

a. Email contents:

From: person sending the email order

To: CDPHE.WICFormula@state.co.us

Subject: participant's first name_email date (example: Joe_06.24.11)

Provide all the information in the order as listed -

- Participant name:
- Family WIC ID number:
- Date of birth:
- Formula:
- Order amount:
- Amount in clinic:
- First Date to Use:
- Appointment date:
- Clinic address:
- Attention:
- Email address of person placing the order:

b. Additional clarifications:

- "Name" - the participant's full name. Those local agencies that prohibit the emailing of participant names can leave this field blank.
- "Family WIC ID Number" as printed on the FI.
- "Formula" - the complete formula name. Specify added ingredients, fiber or flavors, such as "Neocate Jr. – tropical fruit" or "Peptamen Jr. with fiber. The *Ward Road Pharmacy Ordering Guide* and the *2011 Formula Guide: Product List* indicates the available options and whether the formula is available by the can or by the case. Current versions of both documents are maintained on the CO WIC web page.
- "Order amount" refers to the amount of formula requested from Ward Road Pharmacy.
- "Amount in clinic" refers to the amount of formula (number of cans or cases) already in the clinic. Often this is WIC-purchased formula that was not picked up by the endorser/participant or was "leftover" when Ward Road Pharmacy would not break cases.
- "Appointment Date" must lie within the FI's valid date range.
- "First Date to Use" as specified on Compass FIs.
- "Attention" - name of clinic person to receive the formula shipment.

4. **Email the special formula order** to State Office's central mailbox: CDPHE.WICFormula@state.co.us.

5. **Formula pick-up: Endorser picks up the formula on a day within the FI's valid date range.**

a. **WIC staff writes in the total invoice amount** (sum of the formula cost and shipping fees) into the *Actual Amount of Sale* box on the WIC FI. Include the total shipping fee on the last FI. Also, on the back of the last FI, WIC staff writes the **date the formula is picked up** in the space above "For Deposit Only."

Example #1: Number of cans specified on invoice exceeds the number of cans stated on the FI and issued to the participant (as may happen when Ward Road does not split cases):

WIC staff person always writes in the total invoice amount (sum of the formula cost and shipping fees) into the *Actual Amount of Sale* box on the WIC FI. The formula that's paid for but not issued to the endorser can be part of the next month's issuance.

Example #2: Monthly issuance includes two or more FIs:

Invoice indicates \$288.00 for 9 cans of formula and \$10.00 for shipping.

To determine the cost per can, divide 9 into \$288.00. Each can costs \$32.00.

FI #1 is for 4 cans (4 multiplied by \$32.00) = \$128

Write \$128 into the *Actual Amount of Sale* box on WIC FI #1.

FI #2 is for 5 cans (5 multiplied by \$32.00) = \$160 + \$10.00 shipping. Write \$170 into the *Actual Amount of Sale* box on WIC FI #2.

b. Endorser/participant signs the FIs and leaves the clinic with the formula.

c. WIC staff person mails the signed FIs and a copy of the invoice to:

Ward Road Pharmacy
5656 Ward Way, Unit A
Arvada, CO 80002

6. **Maintain the original invoice** in a central file (Compass).
7. **Staff may print the next month's FIs** at the same time the endorser picks up the special formula. Securely store these FIs at the clinic until the endorser/participant arrives to pick up that month's issuance.
8. **Staff ordering the formula receives two emails:** 1) Copied on the order State Office places to Ward Road Pharmacy; 2) email from Ward Road Pharmacy with the date the formula should arrive at the clinic.

Example:

On 7/25: Mom signs the July formula FIs. WIC staff confirms with mom that August formula will be needed and prints the August FIs. Mom's signature is captured in Compass during August FI issuance. Mom takes the July formula home.

Soon after the 7/25 visit: the WIC staff person writes the invoice amount and the 7/25 redemption date on the July FIs and mails them to Ward Road Pharmacy. WIC staff person securely stores the August FIs in the clinic. WIC staff person places the August order with State Office, who then forwards the order to Ward Road Pharmacy.

On 8/25: Mom returns to sign the August FIs and takes the August formula home. If no changes in the formula order, repeat this process for September.

9. When endorser/participant does not pick up the special formula:

- a. **Make every effort to contact the endorser/participant** to learn whether the formula will be picked up. If formula will not be picked up, learn why and document details in the participant's care plan.

b. Once it's established that the formula will not be issued to the participant for whom it was originally intended, the local agency WIC staff person completes the *Actual Amount of Sale* box on the FIs, signs his/her own name and writes *clinic staff* beside her name on the *Authorized Signature* line. These signed FIs are then mailed to Ward Road Pharmacy. Best practice: whenever possible, the WIC RD/RN signs her name and designates *clinic staff* on the FIs.

c. **The WIC RD/RN decides what to do with the unissued formula.** The three allowable options are:

Option #1: Issue this special formula to another WIC participant

- All assurances must be made to ensure that the formula is consistently maintained at a safe temperature. Mailing of formula is prohibited.
- Print the FIs and have the endorser/participant/proxy sign the Compass signature pad.
- WIC Staff person manually writes "VOID" on each of the FIs. Do **not** mail these FIs to Ward Road Pharmacy since WIC has already paid for the formula. Maintain voided FIs in a clinic file for a minimum of 3.5 years.

Option #2: Donate to a local hospital or medical clinic (when appropriate)

Option #3: Dispose of the formula. Open each can and discard it in such a way that it cannot be ingested.

a. **Additional Details:**

- 1) This ordering process has no effect on the direct order process between Ward Road Pharmacy and the WIC Nutritionists from Denver, Tri County and El Paso. That process continues as established.
- 2) Jefferson County WIC staff may continue to send the endorser/participant directly to Ward Road Pharmacy, as presently established.
- 3) The box on the FI is designated for Ward Road's stamp **only**.
- 4) During the bank's edit process, the bank will reject all FIs that appear to be altered. For example, the bank rejects those FIs where the number of cans have been altered and those FIs with white-out.
- 5) Local agency staff can direct questions regarding the special formula order to Ward Road Pharmacy. Email Theresa TMakelky@wardroadrx.com and copy Michelle MMakelky@wardroadrx.com. Their phone number is (303) 420-7979.