



## Transfer Instructions for FI Clinics: How to transfer a participant from an eWIC clinic to your FI clinic

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Colorado WIC will operate two Compass systems (both FI and eWIC) starting with pilot in April 2016 through the final agencies' rollout in November 2016. Even though the final agencies' eWIC rollout begins November 2016, FIs will be processed through February 2017. This document provides guidelines when a participant from a clinic operating eWIC requests to transfer to your (FI) clinic.

### FI Clinic Instructions (Participant Transferring From eWIC Clinic to FI Clinic):

The FI clinic must call the eWIC clinic that the participant is transferring from to determine if the participant has a current certification and obtain a VOC document. This participant will be treated similarly to an out-of-state transfer. Instruct participants to use the current month's eWIC benefits prior to transferring/moving because they may not be able to use their eWIC card at a local vendor near the FI clinic.

1. **If the participant has a current certification,**
  - a. Add the participant as an Out-of-State VOC participant into FI Compass.
  - b. For the Last Benefit Start and Last Benefit End Date:
    - i. If you need to give FIs for this month: Enter the first and last day of last month so you are able to issue FIs for this month.
    - ii. If you need to give FIs for next month: Enter the first and last day of this month, so you are able to issue FIs starting next month.
  - c. Ask the participant to bring their EBT card to their appointment.
  - d. Once the participant arrives at the FI clinic, obtain the EBT card from the participant.
  - e. Complete the appointment and print checks.
    - i. Note: If the participant is an infant and has formula checks, and you are unsure of the formula amount to issue, contact your Nutrition Consultant.
  - f. Finally, contact the eWIC clinic with the participant's name and 16-digit number on the eWIC card. The eWIC clinic will access the participant in eWIC Compass to remove benefits from the card, deactivate the card, and terminated the participant with the reason of "Transfer to FI System."
2. **If the participant does not have a current certification,**
  - a. Complete a certification in FI Compass and issue benefits.

