



Part 1: FIs to eWIC Transition Guide

Exchanging Formula and Non-Formula Checks

Colorado WIC will operate two systems (both FI and eWIC) starting with pilot in April 2016 through the end of the final agencies' rollout in November 2016. Even though the final agencies rollout is in November 2016, participants will have FIs through February 2017. The purpose of this document is to provide instruction for staff on how to exchange formula and non-formula FIs.

As Colorado transitions from FIs to eWIC, it is critical that staff complete all required steps to ensure proper procedures and documentation is complete for all food package exchanges.

To exchange checks you must log into two separate systems - the old FI Compass system and the new eWIC Compass system. It is very important that you log into the correct system to complete the required steps. In FI Compass, you will only have access to a small number of panels; most items will be grayed out. In the new eWIC Compass, you will have access to the same panels you access now in FI Compass. Steps in the FI Compass are in **green** and steps in the eWIC Compass are in **blue**. Contact the main WIC number 303-692-2400 if you need assistance.

Exchanging Formula Checks: Staff must maintain complete documentation of formula issuance and return, so that we are able to prove that no over-issuance of formula occurred when audited. Below are steps for the three scenarios in which formula checks are exchanged.

Scenario A: Participant Returns Cans of Formula Purchased with Current Month Checks

1. **Log into Compass (FI System)**
2. **Go to the Return Formula panel and entered the number of cans returned**
3. **Log into Compass (eWIC System)**
4. **Go to the Food Package panel**
5. **Click "New" to create a new food package**
6. **Enter today's date as the effective date**
7. **Create a new food package with the number of cans returned**

Scenario B: Participant Returns Uncashed Checks for the Current Month and Future Months

1. **Log into Compass (FI System)**
2. **Go to the Food Benefits panel**
3. **Click "Void"**



4. Void the checks the participant has returned. Store these checks with your clinic's voided checks
5. Log into Compass (eWIC System)
6. Go to the Food Package panel
7. Click "New" to create a new food package
8. Enter today's date as the effective date
9. Choose appropriate model food package

Scenario C: Participant Returns Cans of Formula for the Current Month and Uncashed Check(s) for the both the Current Month and Future Months

1. Log into Compass (FI System)
2. Go to the Return Formula panel and entered the number of cans returned
3. Go to the Food Benefits panel
4. Click "Void"
5. Void the checks the participant has returned. Store these checks with your clinic's voided checks
6. Log into Compass (eWIC System)
7. Go to the Food Package panel
8. Click "New" to create a new food package
9. Enter today's date as the effective date
10. Create a new food package with appropriate number of cans. This number should be based on the number of cans returned (do not overissue)
11. Once food package is created for the current month issuance, click "New" again, enter the first day of the next month for the effective date and choose the appropriate food package from the model food package drop down

Exchanging Non-Formula Checks: Exchanging non-formula checks is similar to current procedures. If non-formula checks have been cashed during the current month, then the food package change needs to wait until the next month. For auditing purposes, staff must complete the following steps to void uncashed checks. Please complete the following steps:

1. Log into Compass (FI System)
2. Go to the Food Benefits panel
3. Click "Void"
4. Void any uncashed checks being returned
5. Log into Compass (eWIC System)
6. Go to the Food Package panel
7. Click "New" to create a new food package
8. Enter the first day of the next month for the effective date
9. Choose a model food package and verify

