



eWIC Quick Reference Guide

The purpose of this document is to guide staff through the procedures for issuing benefits in eWIC. This document is for new participants or participants who already have the eWIC card. The following procedures are addressed:

- Issuing eWIC Benefits to a New Family
- How to Deactivate and Replace an eWIC Card
- How to Reissue eWIC Benefits
- How to Return Formula in eWIC
- Retrieving a Foster Child in eWIC and Issuing Benefits

Please note: For those participants with FIs, staff must refer to the *FIs to eWIC Transition Guide* documents.

Issuing eWIC Benefits to a New Family

1. Access the **Food Package** panel to choose the participant’s individual food package.

Participant Priscilla Robinson 1 of 1

Category: Pregnant **EDD:** 07/15/2016

Date of Birth: 04/11/1987 (28 y) **Weeks Gest:** 16 **WIC Status:** Active **Cert. End:** 08/2016 **Last FB:**

Food Package

Effective Date: 01/27/2016 1 of 1 New Edit Delete

End Date: Do Not Auto-Update

Verified Special Diet (Prescribed Formula/Food, Religious Reason) [Documentation](#)

Self-Reported Details

Model Food Package: Preg/Part BF - Standard

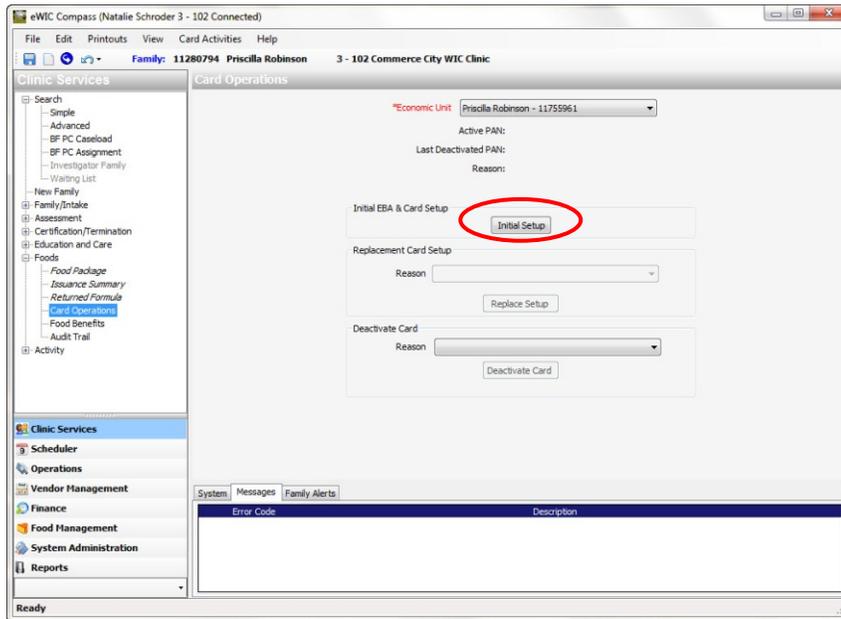
View: Full 2/3 1/3 ***FB Issuance:** 3 Months 1st Day: 1

Food Package Name: Preg/Part BF - Standard

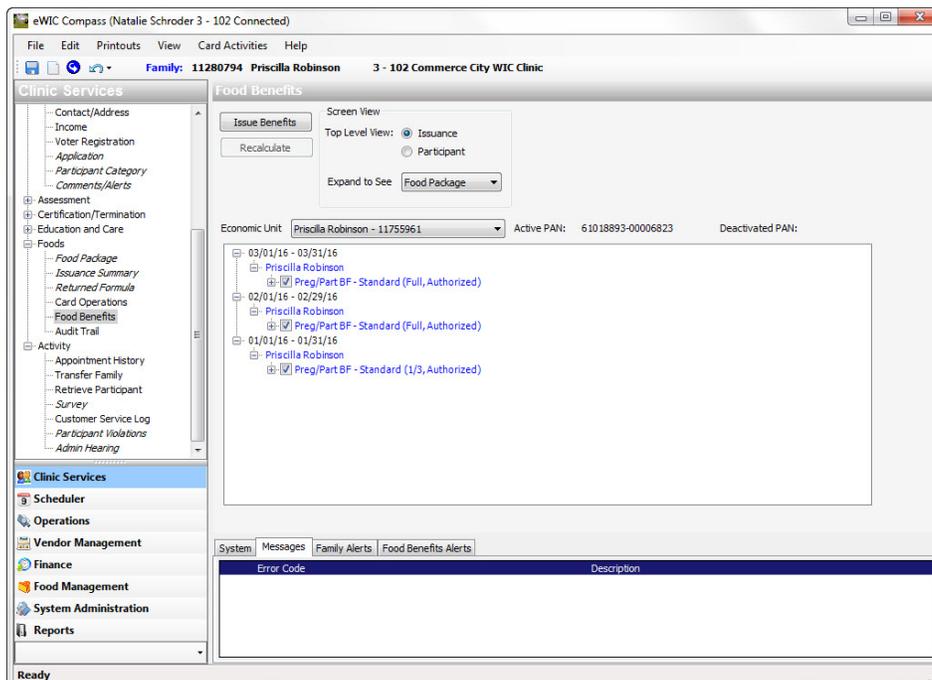
Category	Subcategory	Qty	UOM	Month	Doc ID
02 Cheese and Tofu	000 Cheese - All Authorized	1	Pound	All	
03 Eggs	000 Eggs - All Authorized	1	Dozen	All	
05 Breakfast Cereal	000 Breakfast Cereal - All authorized	36	Ounce	All	
06 Legumes	000 Peanut Butter/Beans - All Authorized	2	Jar/Bag/...	All	
16 Bread/Whole Grain	000 Whole Wheat Bread or Whole Grains - A...	16	Ounce	All	
19 Fruit & Vegetables Ca...	001 Fresh Fruit & Vegetables	11.0	\$\$\$\$	All	

Comments:

2. Access the **Card Operations** panel to select the “Initial Setup” button to setup the family’s Personal Account Number (PAN) for the first time.
3. The PAN pop-up will appear and either swipe the eWIC card or enter the PAN manually. eWIC Compass will search for the PAN to make sure it is not assigned to another family. If the PAN is available, the pop-up will close and the active PAN will display at the top of the **Card Operations** panel.

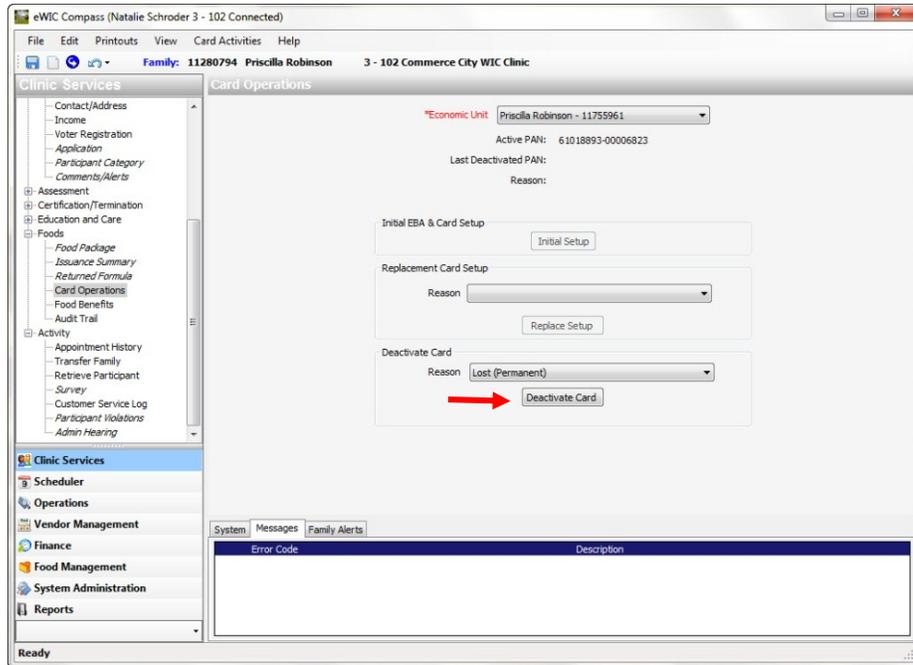


4. Access the **Food Benefits** panel. Verify the appropriate issuance (1 month, 2 month, 3 months). Once verified, click “Issue Benefits” button to issue food benefits to the family’s PAN.
5. Obtain the endorser’s signature to acknowledge receipt of food benefits.
6. The “Family Food Benefits” list will be sent to the printer.

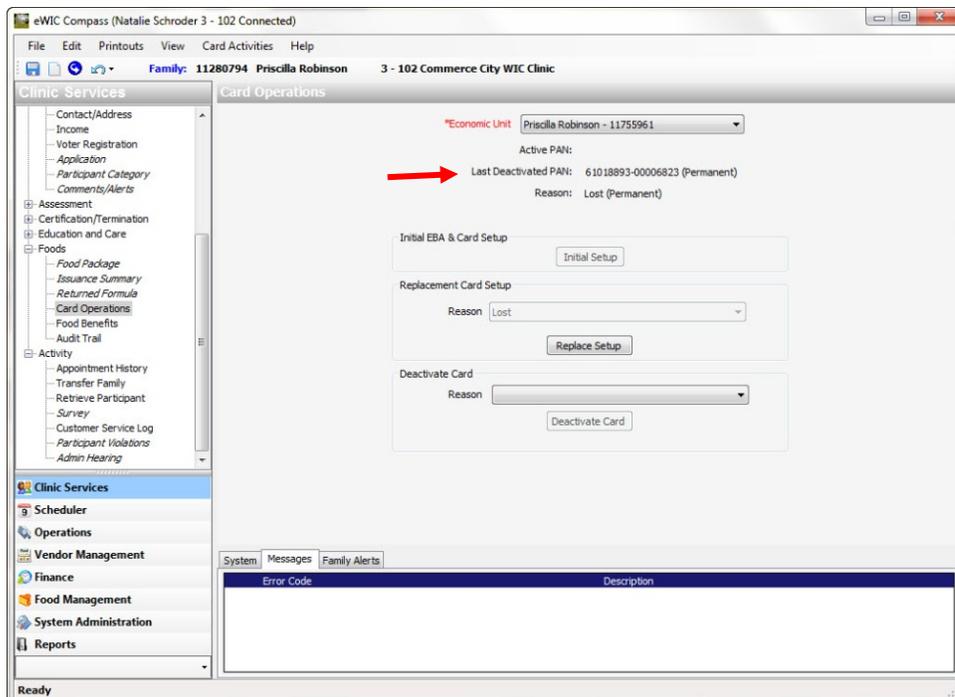


How to Deactivate and Replace an eWIC Card

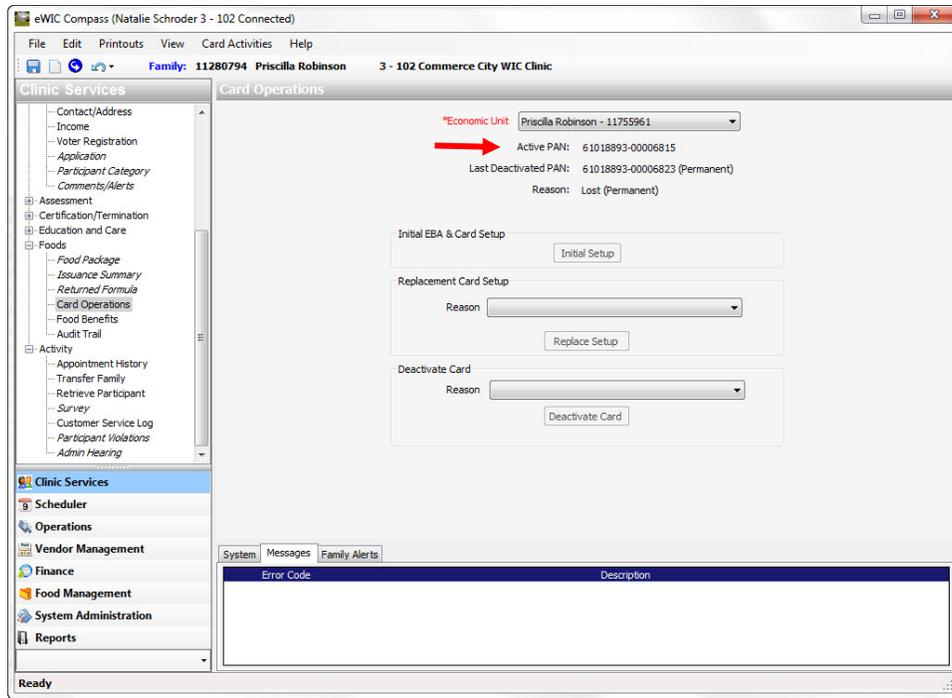
1. Access the **Card Operations** panel, go to the Deactivate Card section and select a reason from the drop down. Click "Deactivate Card". This will permanently deactivate the PAN.



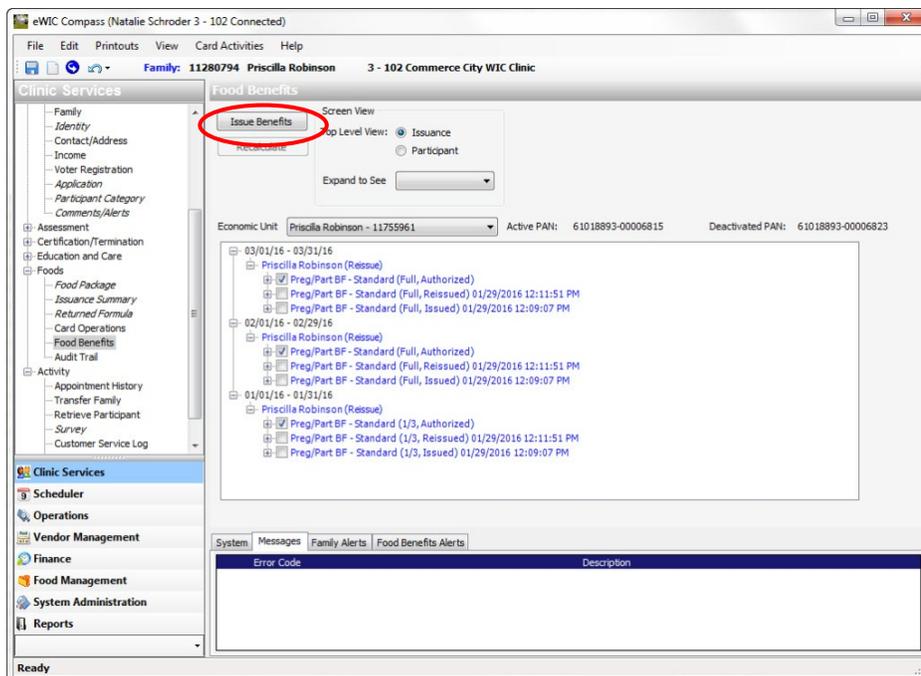
2. The deactivated PAN will display at the top of the **Card Operations** panel.



- Click the “Replace Setup” button, and the select PAN pop-up will display. Swipe the new eWIC card or manually enter the PAN and click “Search”. The pop-up will close if the PAN is available. The replacement PAN should now be displayed as the active PAN at the top of the **Card Operations** panel.



- Access the **Food Benefits** panel. The food benefits available for issuance will display with check marks next to them. Verify the appropriate issuance (1 month, 2 month, 3 months). Once verified, click “Issue Benefits” button.



5. Obtain the endorser’s signature to acknowledge receipt of food benefits.

6. The “Family Food Benefits” list will be sent to the printer.

How to Reissue eWIC Benefits

1. Access the **Food Package** panel, and select “New” to create a new food package.
2. Select a new food package from the Model Food Package drop down and perform a “Save.”

Participant: Priscilla Robinson | 1 of 1

Category: Pregnant | EDD: 07/15/2016

Date of Birth: 04/11/1987 (28 y) | Weeks Gest: 16 | WIC Status: Active | Cert. End: 08/2016 | Last FB:

Food Package

Effective Date: 01/27/2016 | 1 of 1 | New | Edit | Delete

End Date: | Do Not Auto-Update:

Verified: Special Diet: (Prescribed Formula/Food, Religious Reason) | Documentation

Self-Reported: Details

Model Food Package: Preg/Part BF - Standard

View: Full 2/3 1/3 | *FB Issuance: 3 Months | 1st Day: 1

Food Package Name: Preg/Part BF - Standard

Category	Subcategory	Qty	UOM	Month	Doc ID
02 Cheese and Tofu	000 Cheese - All Authorized	1	Pound	All	
03 Eggs	000 Eggs - All Authorized	1	Dozen	All	
05 Breakfast Cereal	000 Breakfast Cereal - All authorized	36	Ounce	All	
06 Legumes	000 Peanut Butter/Beans - All Authorized	2	Jar/Bag/...	All	
16 Bread/Whole Grain	000 Whole Wheat Bread or Whole Grains - A...	16	Ounce	All	
19 Fruit & Vegetables Ca...	001 Fresh Fruit & Vegetables	11.0	\$\$\$\$	All	

Comments

3. Access **Food Benefits** panel and verify the appropriate issuance (1 month, 2 month, 3 months). Once verified, click “Issue Benefits” button. Compass will automatically calculate the remaining food benefits for the participant.

eWIC Compass (Natalie Schroder 3 - 102 Connected)

Family: 11280794 Priscilla Robinson | 3 - 102 Commerce City WIC Clinic

Clinic Services | Food Benefits

Issue Benefits (circled in red)

Recalculate | Expand to See:

Economic Unit: Priscilla Robinson - 11755961 | Active PAN: 61018893-00006815 | Deactivated PAN: 61018893-00006823

- 03/01/16 - 03/31/16
 - Priscilla Robinson (Reissue)
 - Preg/Part BF - Standard (Full, Authorized)
 - Preg/Part BF - Standard (Full, Reissued) 01/29/2016 12:11:51 PM
 - Preg/Part BF - Standard (Full, Issued) 01/29/2016 12:09:07 PM
- 02/01/16 - 02/29/16
 - Priscilla Robinson (Reissue)
 - Preg/Part BF - Standard (Full, Authorized)
 - Preg/Part BF - Standard (Full, Reissued) 01/29/2016 12:11:51 PM
 - Preg/Part BF - Standard (Full, Issued) 01/26/2016 12:09:07 PM
- 01/01/16 - 01/31/16
 - Priscilla Robinson (Reissue)
 - Preg/Part BF - Standard (1/3, Authorized)
 - Preg/Part BF - Standard (1/3, Reissued) 01/29/2016 12:11:51 PM
 - Preg/Part BF - Standard (1/3, Issued) 01/29/2016 12:09:07 PM

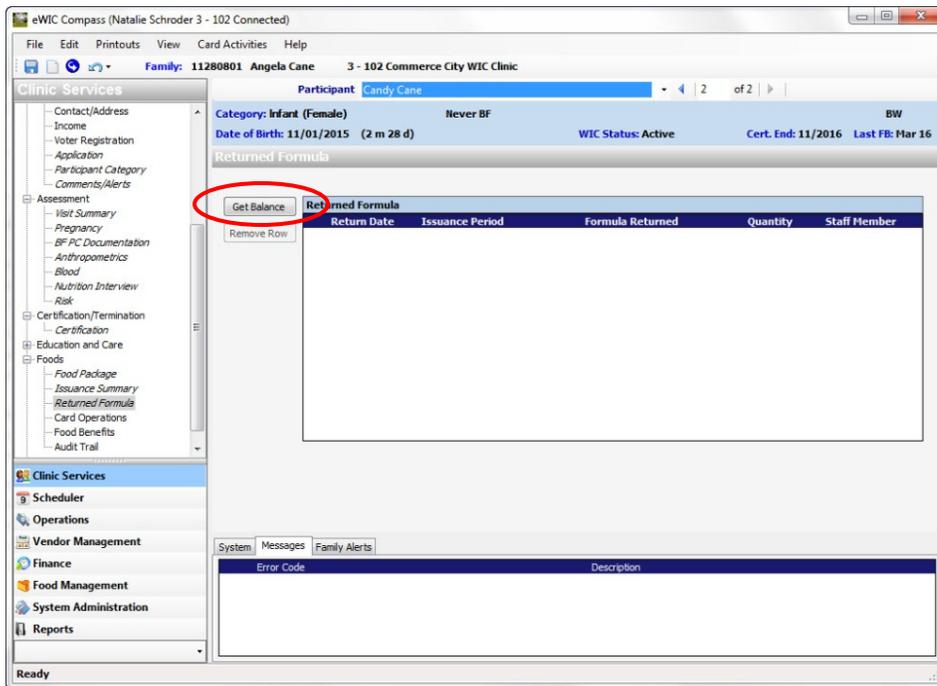
System | Messages | Family Alerts | Food Benefits Alerts

Error Code	Description

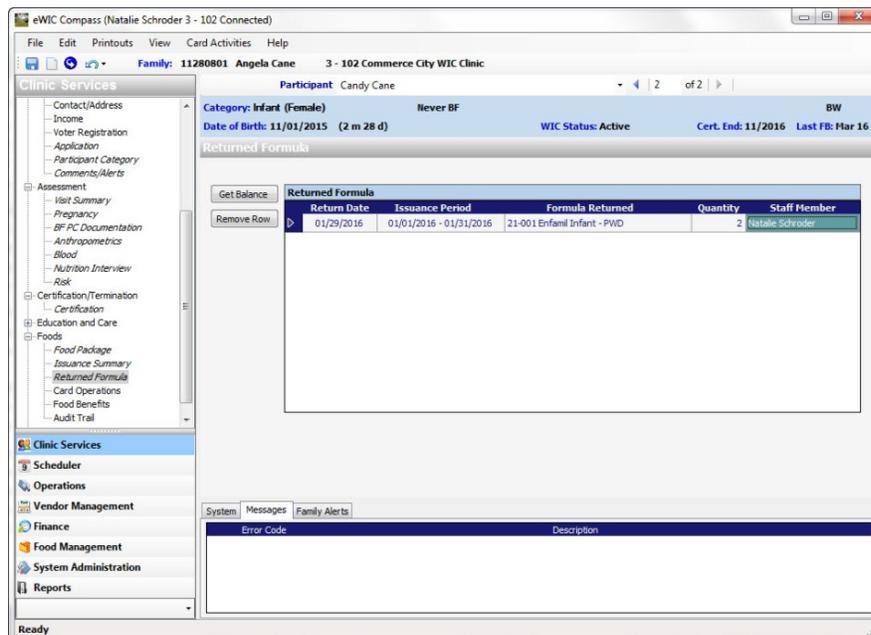
4. Obtain the endorser’s signature to acknowledge receipt of food benefits.
5. The “Family Food Benefits” list will be sent to the printer.

How to Return Formula in eWIC

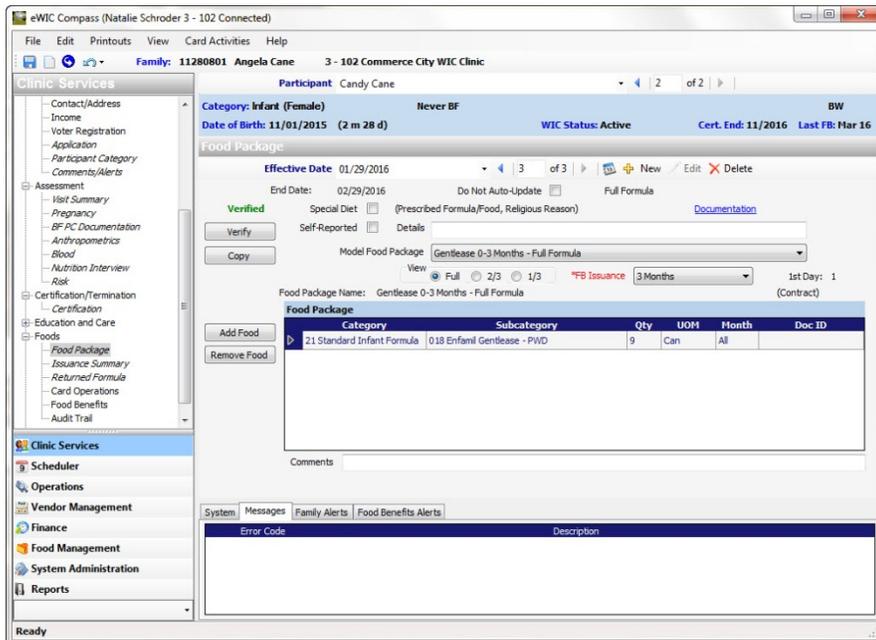
1. Access the **Foods** branch, and select **Return Formula** panel.
2. Select the "Get Balance" button, the returned formula grid displays a row of the current formula issued to the participant.



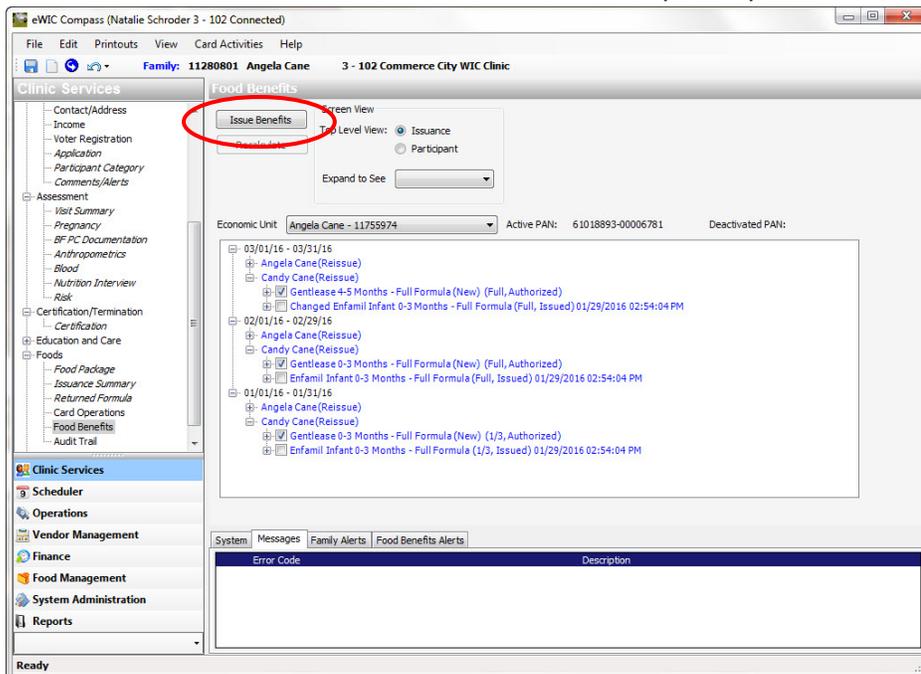
3. Enter the quantity of formula returned into the formula grid and perform a "Save." Compass will not allow you to enter in more than what the participant purchased with the eWIC card.



4. Access the **Food Package** panel, and click “New” to create a new food package.
5. Select a new food package from the Model Food Package drop down and perform a “Save.”



6. Access the **Food Benefits** panel, the available food benefits will display will check marks next to them. Verify the appropriate issuance (1 month, 2 month, 3 months). Once verified, click the “Issue Benefits” button. Compass will automatically calculate how much formula is available for issuance to the participant.



7. Obtain the endorser’s signature to acknowledge receipt of food benefits.
8. The “Family Food Benefits” list will be sent to the printer.

Retrieving a Foster Child in eWIC

1. Open the family you are going to retrieve the participant into. Access the **Activity** branch, and select the **Retrieve Participant** panel.

The screenshot shows the eWIC Compass interface for Family 11280802, Patty Smith. The left sidebar is expanded to the 'Activity' branch, where 'Retrieve Participant' is highlighted with a red circle. The main window displays the 'Family' information for the endorser and participant, along with various settings and a message log.

Family Information:

- Endorser: **Patty Smith** (Date of Birth: 05/15/1982, 33 y) | Category: **Breastfeeding** | WIC Status: Active | Cert. End: 10/2016 | Last FB: [dropdown] | *FB Issuance: 3 Months
- Participant: **Tom Smith** (Date of Birth: 10/01/2015, 3 m 28 d) | Category: **Infant (Male)** | Excl BF | WIC Status: Active | Cert. End: 10/2016 | Last FB: BW | *FB Issuance: 3 Months

Family Data:

- New Member / Proxy
- *Mother's Ed Level: 2 years of college | *Printouts Language: English | BF PC: [dropdown]
- Needs Interpreter: [checkbox] | Preferred Spoken Language: English | Educator: [dropdown]
- Economic Unit: Patty Smith | EU Nbr: 11755976 | Current PAN: 61018893-0006773 | Status: Active
- *Referred To WIC By: Family/Friend

Message Log:

- Tom Smith
• 10006 - Is the Infant still breastfeeding?

2. Conduct a Simple Search within the **Retrieve Participant** panel for the participant you are going to retrieve.

The screenshot shows the eWIC Compass interface with the 'Retrieve Participant' panel selected. The 'Simple' search option is chosen, and the search criteria are set to 'Family ID'. A search button is visible next to the Family ID input field.

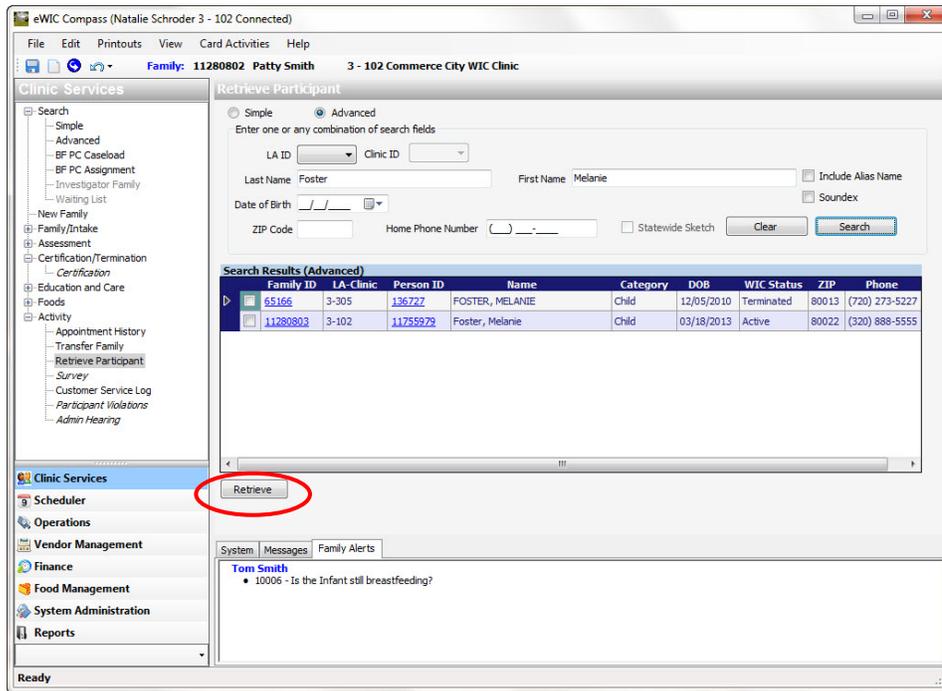
Search Results (Simple):

Family ID	LA-Clinic	Person ID	Name	Category	DOB	WIC Status	ZIP	Phone
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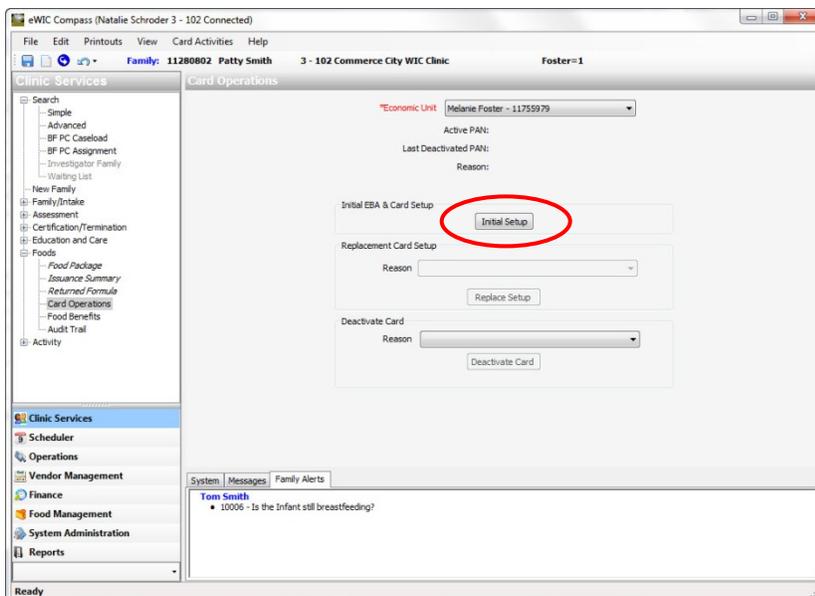
Message Log:

- Tom Smith
• 10006 - Is the Infant still breastfeeding?

3. The family will display in the search results, click in the check box next to the participant you want to retrieve into the current family you have open in Compass and click the “Retrieve” button.



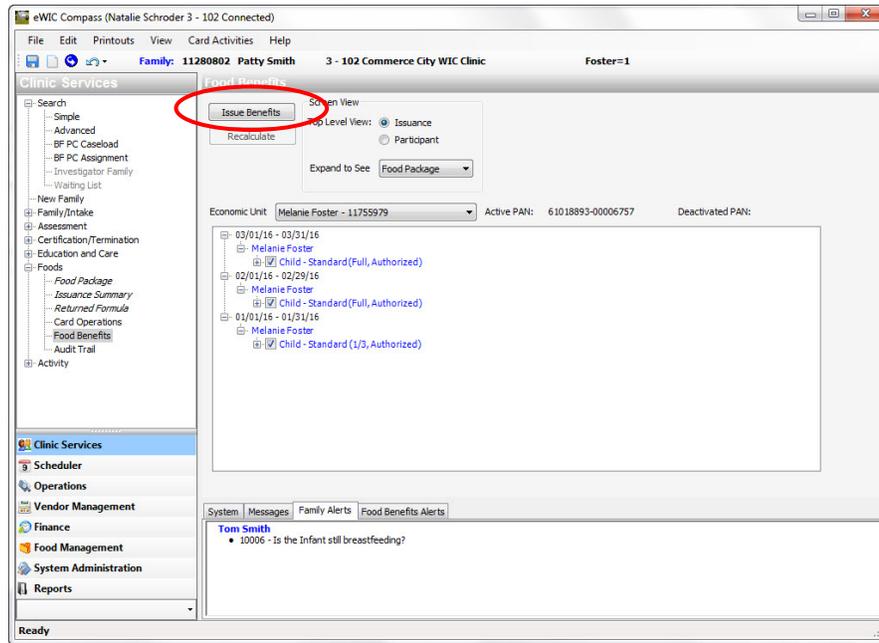
4. The family panel will display with the participant that you have retrieved into the family. If the participant is going to be a foster child you will need to make the participant a foster child in Compass.
 - a. In the **Family** panel, select the edit link next to the participant you will need to make a foster child in Compass.
 - b. The member/proxy pop-up will appear, and the select the enrollment link inside the pop-up.
 - c. The enrollment pop-up will appear, and select the “Make Foster Child” button and enter the date the participant entered into foster care and click “Close” to close the pop-up.



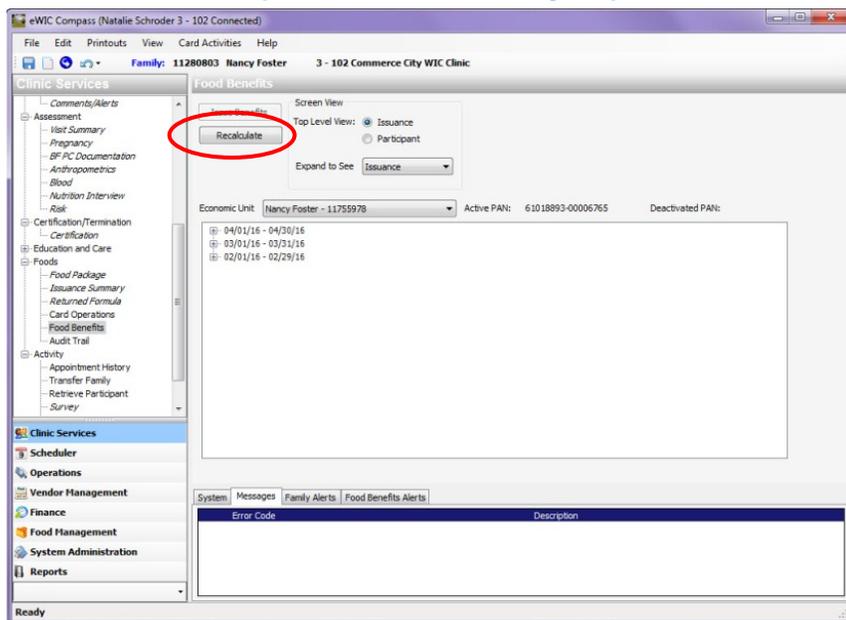
5. Assign a separate PAN for the foster child because foster children are their own household/economic unit (EU).

6. Access the **Foods** branch, and select **Card Operations** panel. Inside Card Operations, click the “Initial Setup” button and the select PAN pop-up will appear. Swipe or enter in the PAN and click “Search”.

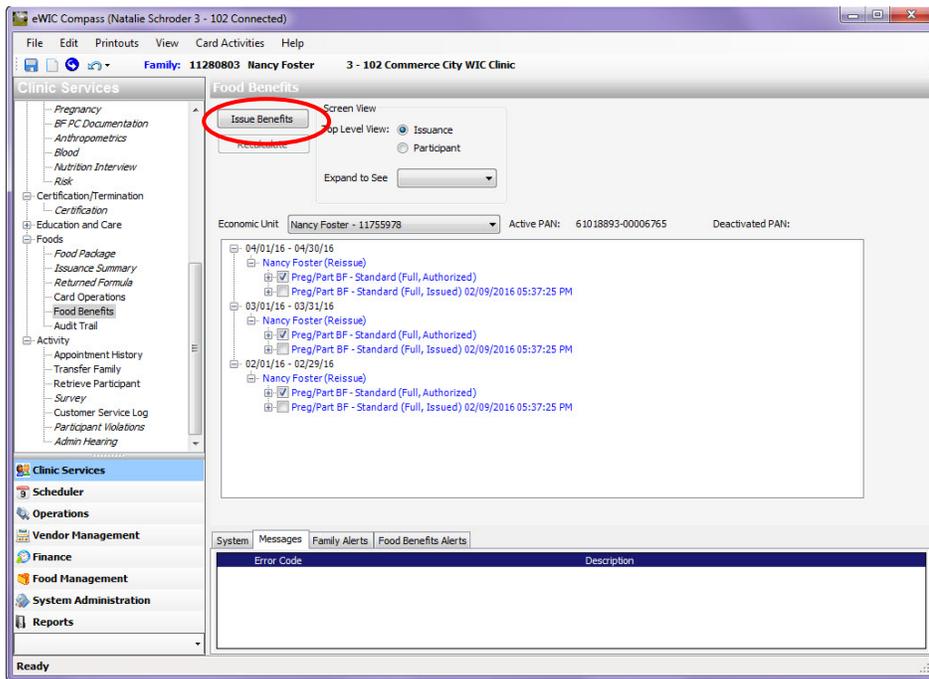
7. Compass will check to make sure the PAN is available for use. The new card will show up next to Active PAN at the top of the screen. The foster child will be a separate Economic Unit in the Economic Unit drop down.
8. Access the **Food Benefits** panel, and the food benefits available for issuance will display with check marks next to them and select the “Issue Benefits” button.



9. Obtain the endorser’s signature to acknowledge receipt of food benefits.
10. The “Family Food Benefits” list will be sent to the printer.
11. Access the **Simple** panel, enter the old family ID of the foster participant and click “Search”. Click on the Family ID to open the family. **If the old family is outside your local agency you will need to contact that local agency and WIC clinic to have that clinic perform the following steps (other clinic steps in blue below):**



- a. Access **Food Benefits** panel, and select the “Recalculate” button. The food benefits will recalculate to remove the foster child from the old family ID.



b. The available food benefits will display with check marks next to them. Click the “Issue Benefits” button. Now the family will only have benefits in the account for the current family members (the child removed no longer has benefits on their card).

c. The Signature Pad pop-up will appear. Select “Remote Issuance” since the endorser will not be present to sign for food benefits. Click “Close” to close the pop-up. The issued food benefits are now displayed in the **Food Benefits** panel.