



SECTION: Nutrition Services 735
SUBJECT: **EXCHANGE AND HANDLING OF RETURNED FORMULA**
DATE: October 13, 2016 (*revised*)

POLICY: Local programs shall exchange and track formula that has been issued through TWIST and subsequently returned as unopened cans to the local program.

PURPOSE: To ensure program accountability, product safety and consistency in handling returned formula.

RELEVANT REGULATIONS: 7 CFR §246.16(a)—Infant formula cost containment
7 CFR §246.10(c)(1)(2)—Food Packages

OREGON WIC PPM REFERENCES: ♦561—Program Integrity: Replacement of Food Benefits
♦588—Program Integrity: Complaints
♦590—Program Integrity: Participant Violations
♦713—Breastfeeding: Use of Supplemental Formula
♦720—General Information on Formula Use
♦733—Formula Warehouse
♦760—Medical Formulas and Nutritionals

TWIST TRAINING MANUAL REFERENCES: Chapter 3: Client Processes Lesson: Formula Replacement (FR) and Formula Exchange (FX)

DEFINITIONS:

Formula exchange The return of unopened cans of formula purchased with Oregon WIC benefits for issuance of new benefits with a different formula. Opened cans of formula cannot be exchanged. Previous months' benefits cannot be replaced.

Formula replacement Benefits issued and redeemed for formula may be replaced under limited circumstances. See ♦561 – Program Integrity: Replacement of Food Benefits for additional information.

PROCEDURE:

When to allow formula exchange 1.0 Staff may use the formula exchange process in TWIST to issue benefits for a different formula than originally issued. Listed below are guidelines for when it is appropriate to use this process. See ♦720—General Information on Formula Use for additional information on formula issuance.

HANDLING RETURNED FORMULA *cont.*

- (When to allow formula exchange)**
- 1.1 Participant was issued and purchased the incorrect formula.
- EXAMPLE:** Nutramigen Enflora was the correct formula to select but the staff member selected Neosure by mistake..
- 1.2 Participant changed formula due to an allergic response or other medical reason after the formula was purchased.
- EXAMPLE:** Participant was issued Similac Advance but is experiencing hives. After talking with their health care provider, they bring in medical documentation to switch to Alimentum.
- Exchanging formula**
- 2.0 Participants may receive up to the maximum allowable amount of reconstituted ounces of infant formula per age and category. Any opened cans that are not being returned will count against the maximum allowable issuance. When exchanging one formula for another, staff must keep in mind that formulas and nutritionals come in different container sizes and different forms, therefore the exchange may not be an even one to one ratio. See ♦561–Program Integrity: Replacement of Food Benefits
- Cannot exchange previous month formula**
- 2.1 Formula purchased with benefits from the previous month cannot be exchanged for new benefits, regardless of when in the month the participant received the benefits.
- Formula Warehouse**
- 3.0 The Oregon WIC program contracts with a home medical equipment (HME) vendor to provide special or hard-to-find medical formulas and nutritionals to WIC participants See ♦733—Formula Warehouse for guidelines on issuing formula via a formula warehouse.
- Issuing returned formula**
- 4.0 Returned formula cans may be re-issued to a participant for the following reasons:
- *Transition to a new formula:* One can of powder or three cans of concentrate may be issued to blend with the current formula to facilitate the change to the new formula.
 - *Formula trial:* The current formula is not well tolerated and the participant would like to try a new formula before changing food packages. Communication with the participant’s health care provider prior to issuance of a medical formula is recommended.
 - *Returned formula replacing benefit issuance:* Cans of formula may be re-issued to another WIC participant (e.g. recirculated medical formula replacing a formula warehouse order). Document the issuance of the number of cans and type of formula in the “progress notes” section of participant’s TWIST record with an explanation of why the formula benefits were not issued. Assure that the food package assignment in TWIST is adjusted accordingly to prevent over-issuance.

HANDLING RETURNED FORMULA *cont.*

- (Issuing returned formula)***
- 4.1 Document issuance of the number of cans and type of formula in the participant’s TWIST record, either in “Intake Notes” or “Progress Notes.”
 - 4.2 In order to assure program integrity and accountability, staff will write “WIC” or “Not for resale” in indelible marker on all formula cans before issuance to a participant to prevent exchange or resale of the formula.
 - 4.3 Notify participants that they are not to sell, attempt to sell, trade or give away formula purchased through WIC, including internet sales, and that doing so may result in disqualification from the program and/or payment of restitution. See ♦590–Program Integrity: Participant Violations.
- Using “Formula Exchange” in TWIST***
- 5.0 Use the “Formula Exchange” function in TWIST when a participant returns formula and needs to be reissued benefits for a different formula. See the TWIST Training Manual, Chapter 3, Section 5, Lesson 504 for instructions on handling formula returns in TWIST.
- Managing returned formula inventory***
- 6.0 Local program staff shall assure that returned formula is kept secure and clearly marked as indicated in ¶4.2. Formula inventory will be monitored for expiration dates to assure that formula is redistributed prior to expiration and not stockpiled. Staff will assure that formula is not on display in order to promote a breastfeeding friendly environment.
- Expired formula***
- 7.0 Dispose of all expired cans of formula. ***Do not*** give WIC participants formula cans that are past their expiration date. Do not donate formula cans that are past the expiration date to food banks or other agencies.
- Formula donations***
- 9.0 Local programs have the option of donating bid formulas to a food bank prior to the expiration date. Local agencies shall not donate any formulas or nutritionals other than bid formulas to food banks.
 - 9.1 Returned medical formulas may be redistributed to other WIC clinics before their expiration dates. Contact a State nutrition consultant for assistance with this process. ★

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