
Required Guidance: Remote Transfers

Staff must offer both in person and remote transfer appointments and let the participant or caregiver decide which option they prefer. Transfers include:

- [Transfers within Washington WIC](#)
- [Transfer into Washington WIC](#)
- [Providing transfer information for participants who move out of state](#)

As part of the American Rescue Plan Act (ARPA) policy waivers allowed by the Food and Nutrition Service (FNS), this policy is in effect from September 1, 2023 until September 30, 2026.

Staff must:

1. Complete the contact by an agency landline phone, agency cell phone or secure interactive video chat.
 - Check with your IT staff or staff at the state WIC office about what electronic methods meet the definition of a secure video chat.
2. Use an interpreter for the contact when bi-lingual staff aren't available to interpret for a participant with Limited English Proficiency (LEP).
 - Document the use of an interpreter service in the participant's file.
 - See the "Use and Interpreter" policy in [Volume 1, Chapter 11 – Assessment](#) for more information.
3. Complete the required elements of a transfer in as listed in procedure below.

Note: When completing an in person transfer, follow policies and procedures in [Volume 1, Chapter 21 - Transfer/Verification of Certification](#).

PROCEDURE:

Staff:

- A. Complete the following for **transfers within Washington WIC**:
 1. Accept transferring Washington WIC participants with current eligibility.

- Staff don't have to see the participant's proof of identity when transferring remotely within the state of Washington.
 - The transfer participant or Parent Guardian doesn't have to sign a new Rights and Responsibilities form electronically. The signature captured at the previous clinic for the certification transfers with their file.
2. Ask if the participant or caretaker has the WIC Card issued from the previous clinic.
 - Issue a new card when needed by swiping the card or entering the number on the Issue EBT Card screen.
 - See Procedure B, 10 below for guidance on providing the WIC Card to the participant or caretaker.
 3. Issue food benefits as appropriate and sign for the food benefits by writing "RBI" (Remote Benefit Issuance) and your initials.
 - Ask if the participant or caretaker has any questions about their WIC foods or shopping with the WIC Card and provide information as needed.
 - Delete all shopping lists from the Downloads folder after generating reports or printing a Shopping List in Cascades.
 4. Provide and document referrals as needed.
 5. Schedule the participant's next appointment based on their needs.
 6. Thank the participant for participating in WIC and offer a phone number for questions.

Note:

See the following resources and tools for more information:

- [Volume 1, Chapter 21 – Transfers](#)
- [Schedule an Appointment to Transfer Between Cascades Clinics](#)
- [Transfer a Family Between Agencies or Clinics](#)
- [Transfer Between Families](#)

- B. Complete the following for participants who **transfer Into Washington WIC from out of state**:
1. Accept transfer participants with current eligibility.
 2. Obtain transfer information.
 - a) View the transfer information during a secure video chat when possible.
 - b) Obtain transfer information from the participant or the previous WIC clinic in another state.
 - The participant can mail the transfer information to the clinic, bring it in to the clinic, etc.
 - Staff can contact the previous WIC clinic to request the transfer information. The previous clinic can provide the information by email, fax or phone.
 3. Document appropriate information in the participant's file.
 - a) Participant category.
 - b) Demographic information, including name, date of birth, gender and address.
 - c) Enter due date if the participant is pregnant or delivery date if breastfeeding or non-breastfeeding postpartum.
 - d) Participant race and ethnicity information.
 - Let the person know WIC asks this information to find out who WIC serves and doesn't affect eligibility or immigration status.
 - Select the participant's declared race and ethnicity.
 - If the person can't, or doesn't want to, declare this information, staff must do their best and enter the information.
 - Staff will have to select Hispanic or Non-Hispanic for ethnicity and can then select all race categories.
 - e) Dates eligibility begins and ends.

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- Use the dates from the transfer information.
 - If the participant transfers from another state which certifies the participant category for a shorter period than Washington, use the Washington WIC eligibility period.
- f) Enter all nutrition risks and measurements from the transfer information.
- Into state transfer participants will automatically be assigned the risk “Transfer of Certification”, risk 502.
- g) Scan the “hard copy” transfer documentation in the participant’s file when available.
4. Staff don’t have to see the participant’s proof of identity and residency when transferring in remotely from another state.
5. Complete the Rights and Responsibilities form.
- a) Ask the participant if they have access, by phone or on a computer, to read the [Rights and Responsibilities form](#) on the Washington WIC website, or read the entire form to the participant.
- Direct the participant to the [Rights and Responsibilities form](#) in their language, read the form to the person in their language, or ask the interpreter or Language Line staff to read the form to the person in their language.
- b) Once the participant has read or had the Rights and Responsibilities form read to them, verbally review the required information on the form and ask if the person has any questions and if they agree.
- See [Volume 1, Chapter 7 – Rights and Responsibilities](#) for more information about the required review.
- c) If the participant agrees to the Rights and Responsibilities, click **Capture Signature**, and write “Read to/ppt agreed” then sign your initials in the **Certification Signature** box.
6. Provide and document referrals.
7. Issue a WIC Card – swipe the WIC Card or enter the number on the Issue EBT Card screen.

8. Prescribe and issue food benefits as appropriate.
 - a) Issue food benefits for the appropriate number of months (1, 2 or 3 months of issuance) based on the participant's needs.
 - b) Issue food benefits as appropriate and sign for the food benefits by writing "RBI" (Remote Benefit Issuance) and your initials.
9. Offer WIC shopping education and information about how to use the WIC Card.
 - a) Ask if the participant can download and view the [WIC Shopping Guide](#) on the WIC website to see the foods while staff review them on the phone or during the video chat.
 - b) Encourage the participant to consider downloading the WIC Shopper App.
10. Offer the participant the option to mail the WIC Card or have the participant pick the card up at the clinic.
 - a) Let the participant know the card may take 5 – 7 days to arrive by mail.
 - b) If the participant prefers staff mail the card:
 - Confirm the address in the participant's file is correct.
 - Provide the card along with the WIC ID and Card folder which lists required written referral information.
 - Offer a Shopping List, Shopping Guide, and other WIC Card materials as needed if the participant doesn't access the WIC Shopper App.
 - c) Provide the [Mailed WIC Card Letter](#).
 - The Mailed WIC Card Letter is available in many languages on the [WIC Policy and Procedure page](#) under Providing Remote WIC Services.
 - d) Write or stamp on the envelope, "DO NOT FORWARD, RETURN TO SENDER."

11. Schedule the participant's next appointment based on their needs.
12. Thank the participant for participating in WIC and offer a phone number for questions.

See the following resources and tools for more information:

- [Volume 1, Chapter 21 – Transfers](#)
- [Schedule an Appointment to Transfer Into the Cascades System](#)
- [Transfer a Family into the Cascades System](#)

C. Provide transfer information to all eligible participants who want to **transfer out of Washington WIC** or provide transfer information to the WIC clinic where they transfer their WIC eligibility.

1. Print an Out of State Transfer Information document.
2. Review the document to ensure it includes current participant information including benefit issuance.
3. Document additional information on the transfer document as appropriate. Examples include:
 - Farmers Market benefit issuance
 - Information about loaned breast pumps
 - Participant date of birth, anthropometrics, hemoglobin and notes.
4. Confirm the participant's address and send the transfer information to them or send directly to the next clinic using the recommended practices listed above.

See the following resources and tools for more information:

- [Volume 1, Chapter 21 – Transfers](#)
- [Transfer Participants Out of the Cascades System/Out of State](#)

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