



Cascades Steps – Exchange Formula Benefits



These steps go over how to exchange infant formula already issued to the participant. This includes benefits on the WIC EBT account and unopened formula the participant already purchased with WIC benefits. These steps do not work for PediaSure, instead use the replace food benefit steps for that issue.

Important! before making any changes in Cascades, **staff must:**

- Collect all infant formula the family has on hand (WIC purchased formula at home) and know the remaining on the EBT balance. Staff must replace all the formula at one time. If they don't, the family will lose out on formula.
 - Do not change any infant food prescriptions until you have all formula accounted for and are ready to complete the exchange.
- Keep in mind only one exchange per day can be made in Cascades.
- Use the Exchange/Increase screen to change or increase a formula.
- Review the food prescriptions and benefits closely at each step to catch or prevent any issues:
 - Review all current and future food prescriptions for the infant and mom to ensure the dyad match.
 - Review the food issuance screen before issuing any benefits.
 - Review the Shopping list and verify the benefits are correct.

For policy, see [Volume 1, Chapter 23 WIC Foods](#).



Cascades Steps – Exchange Formula Benefits

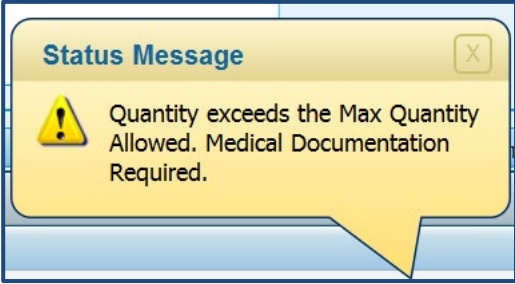
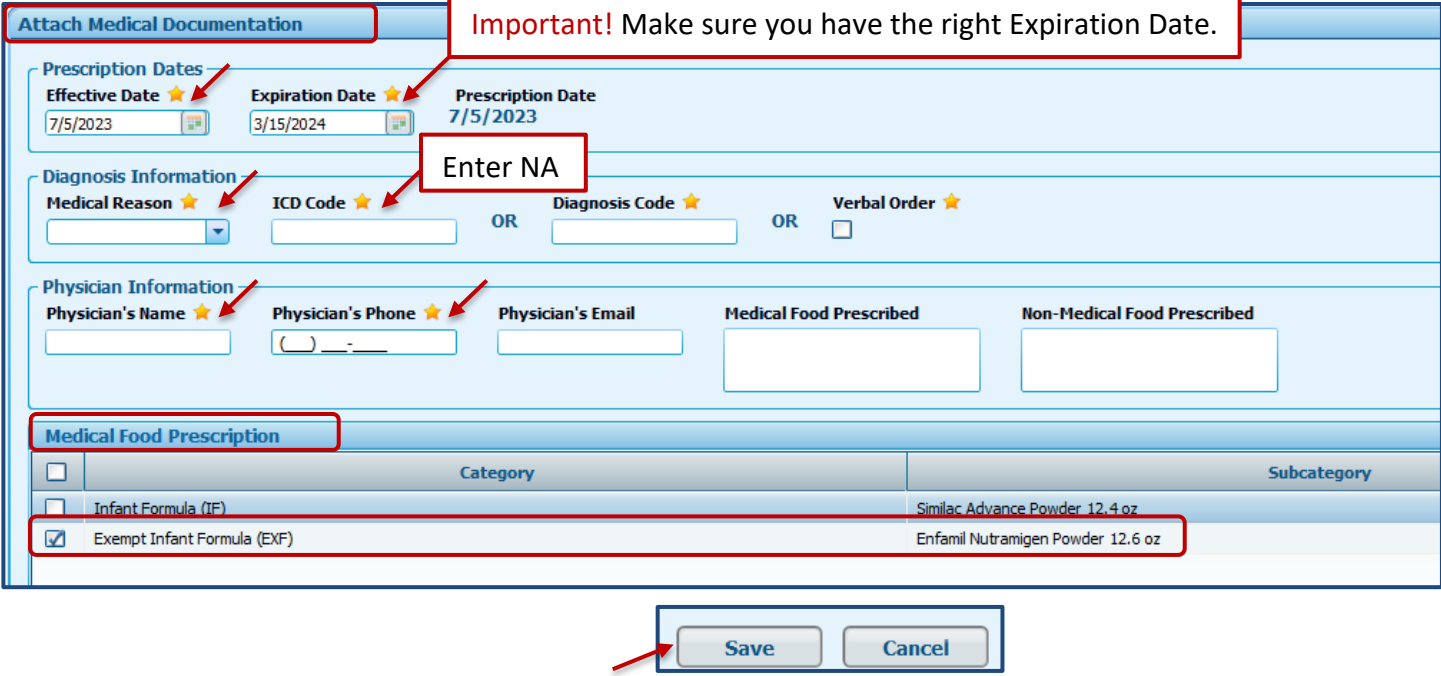


Steps	Cascades Screen																																																		
<p>1. Review Issue Food Instruments</p> <ul style="list-style-type: none"> From Issue Benefits quick links select Issue Food Instruments quick link. Since the participant has benefits already issued, you will see the word Issued next to each month already provided. 	<p>Issue Food Instruments</p> <p>Configuration</p> <p>Family Issuance Day: 28 Issuance Frequency: 3 Month(s)</p> <table border="1"> <thead> <tr> <th>Category</th> <th>Participant</th> <th>Certification End Date</th> <th>Jun</th> <th>Jul</th> <th>Aug</th> </tr> </thead> <tbody> <tr> <td>Non-Breastfeeding</td> <td>SAMANTHA MILLER</td> <td>9/30/2023</td> <td>Issued</td> <td>Issued</td> <td>Issued</td> </tr> <tr> <td>Infant</td> <td>TIM MILLER</td> <td>3/31/2024</td> <td>Issued</td> <td>Issued</td> <td>Issued</td> </tr> <tr> <td>Child</td> <td>KATIE MILLER</td> <td>6/30/2024</td> <td>Issued</td> <td>Issued</td> <td>Issued</td> </tr> </tbody> </table>	Category	Participant	Certification End Date	Jun	Jul	Aug	Non-Breastfeeding	SAMANTHA MILLER	9/30/2023	Issued	Issued	Issued	Infant	TIM MILLER	3/31/2024	Issued	Issued	Issued	Child	KATIE MILLER	6/30/2024	Issued	Issued	Issued																										
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<p>2. Void Future Benefits:</p> <p>If future benefits are issued, you will need to void.</p> <ul style="list-style-type: none"> Go to Food Instrument List Select a column header to sort food instruments. Sort by Last Date to Spend Check the box next to any future benefits. Click on Void Selected. 	<p>Family Food Instruments</p> <table border="1"> <thead> <tr> <th>Serial #</th> <th>First Date to Spend</th> <th>Last Date to Spend</th> <th>Status</th> <th>Issue Date</th> </tr> </thead> <tbody> <tr><td>5325098</td><td>7/3/2023</td><td>7/27/2023</td><td>Redeemed</td><td>7/3/2023</td></tr> <tr><td>5325101</td><td>7/3/2023</td><td>7/27/2023</td><td>Redeemed</td><td>7/3/2023</td></tr> <tr><td>5325102</td><td>7/3/2023</td><td>7/27/2023</td><td>Issued</td><td>7/3/2023</td></tr> <tr><td>5325099</td><td>7/28/2023</td><td>8/27/2023</td><td>Issued</td><td>7/3/2023</td></tr> <tr><td>5325103</td><td>7/28/2023</td><td>8/27/2023</td><td>Issued</td><td>7/3/2023</td></tr> <tr><td>5325104</td><td>7/28/2023</td><td>8/27/2023</td><td>Issued</td><td>7/3/2023</td></tr> <tr><td>5325100</td><td>8/28/2023</td><td>9/27/2023</td><td>Issued</td><td>7/3/2023</td></tr> <tr><td>5325105</td><td>8/28/2023</td><td>9/27/2023</td><td>Issued</td><td>7/3/2023</td></tr> <tr><td>5325106</td><td>8/28/2023</td><td>9/27/2023</td><td>Issued</td><td>7/3/2023</td></tr> </tbody> </table> <p>Buttons: Void Selected, Replace</p>	Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date	5325098	7/3/2023	7/27/2023	Redeemed	7/3/2023	5325101	7/3/2023	7/27/2023	Redeemed	7/3/2023	5325102	7/3/2023	7/27/2023	Issued	7/3/2023	5325099	7/28/2023	8/27/2023	Issued	7/3/2023	5325103	7/28/2023	8/27/2023	Issued	7/3/2023	5325104	7/28/2023	8/27/2023	Issued	7/3/2023	5325100	8/28/2023	9/27/2023	Issued	7/3/2023	5325105	8/28/2023	9/27/2023	Issued	7/3/2023	5325106	8/28/2023	9/27/2023	Issued	7/3/2023
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<p>3. Confirm Benefits Voided:</p> <ul style="list-style-type: none"> Select Issue Food Instruments. In the Family Issuance Members container: <ul style="list-style-type: none"> The word FULL means full benefits are available for issuance. <p>In this example: July and August show status Full, we know the benefits voided successfully.</p>	
<p>4. Select Infant icon in Family Carousel.</p> <ul style="list-style-type: none"> Click Infant icon. Note the Icon should have a grey box around it once selected. 	

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<p>5. Create New Prescription:</p> <ul style="list-style-type: none"> Select Prescribe Foods. Select plus sign (+) to create a new prescription. You will see Select the New Food Prescription Date. Select Save. 	<div style="border: 1px solid red; padding: 5px; margin-top: 10px;"> <p>Important: Once a new food prescription has been created and an exchange completed you must wait until next day for any changes!</p> <p>Cascades must see a difference in formula from last food prescription and new one. If not, it won't be able to complete the exchange.</p> </div>
<p>6. Add New Formula:</p> <ul style="list-style-type: none"> DO NOT make changes to the <u>current formula</u> already in the Food Prescription Items container. <p>Instead, add in the new formula. See the next page.</p>	<div style="border: 1px solid red; padding: 5px; margin-top: 10px;"> <p>Do NOT touch any of this until later.</p> </div>

Steps	Cascades Screen
<ul style="list-style-type: none"> Under Add Item to Food Prescription: <ul style="list-style-type: none"> Category = Infant Formula (IF) or Exempt Formula (EXF) <p>Note: Depending on the type of formula needed, you will select Infant Formula or Exempt Formula (see boxes.)</p> <p>In this example:</p> <ul style="list-style-type: none"> Category = Exempt Infant Formula (EXF) Subcategory = Enfamil Nutramigen Powder 12.6 oz Enter Quantity Select Add Item 	<p>Add Item to Food Prescription</p> <p>Category Subcategory</p> <p>WTC Eligible Nutritionals</p> <ul style="list-style-type: none"> Infant Formula (IF) Exempt Infant Formula (EXF) <div style="display: flex; justify-content: space-around;"> <div data-bbox="642 691 1211 1040" style="border: 1px solid black; padding: 5px;"> <p>Category = Infant Formula</p> <p>For example:</p> <ul style="list-style-type: none"> Standard formula <ul style="list-style-type: none"> Similac Advance Similac Soy Isomil Alternative: <ul style="list-style-type: none"> Similac Sensitive Similac Total Comfort </div> <div data-bbox="1291 649 1864 998" style="border: 1px solid black; padding: 5px;"> <p>Category = Exempt Formula</p> <p><i>Formula requiring MDF <u>and</u> diagnosis.</i></p> <p>For example:</p> <ul style="list-style-type: none"> Enfamil NeuroPro EnfaCare Enfamil Nutramigen Similac Alimentum Similac NeoSure </div> </div> <p>Add Item to Food Prescription</p> <p>Category Subcategory Quantity Max / Med Max UOM</p> <p>Exempt Infant Formula (EXF) Enfamil Nutramigen Powder 12.6 oz 806 0 / 806 Ounce</p> <p>Add Item Clear</p>

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<p>7. Note Status Message(s):</p> <ul style="list-style-type: none"> • Quantity exceeds the Max. <ul style="list-style-type: none"> ○ This is normal. ○ We will adjust later. • Medical Documentation Required. <ul style="list-style-type: none"> ○ Will appear if required. ○ Do NOT fill this out until prompted. 	
<p>8. Medical Documentation Form (MDF):</p> <p>The MDF will automatically open if it's required.</p> <ul style="list-style-type: none"> • Enter the following: <ul style="list-style-type: none"> ○ Effective Date ○ Expiration Date ○ Medical Reason ○ ICD Code = NA ○ Physicians Name ○ Physicians Phone • In Medical Food Prescription container: <ul style="list-style-type: none"> ○ A new formula should appear. • Select Save. 	

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<p>9. Finalize Current Food Prescription:</p> <ul style="list-style-type: none"> Note <i>Validation Summary</i> pops up to remind you to clean up prescription. This is normal. Close the Validation Summary pop-up. Zero out the old formula quantity (e.g., Similac Advance). 	<p>Validation Summary: 4</p> <ul style="list-style-type: none"> Category maximum exceeded for Infant Formula (IF) for prescription with date 7/5/2023 12:00:00 AM Category maximum exceeded for Infant Formula (IF) for prescription with date 7/16/2023 12:00:00 AM Category maximum exceeded for Infant Formula (IF) for prescription with date 9/16/2023 12:00:00 AM 6 to 11 month old Infants may not receive Food Products when the amount of Formula prescribed exceeds the Full Nutrition Benefit for WIC. <p>Close Validation Summary pop-up. Note until all food prescriptions have been corrected you will continue to get a validation pop-up.</p> <p>Corrected amount</p>
<ul style="list-style-type: none"> Review and Update Future Infant Food Prescriptions (Rx's): Review all future infant Rx's in the carousel. Update all Rx's with old formula like in step 9. Select Save. 	<p>7/3/2023 1 to 3 Months 7/5/2023 1 to 3 Months 7/16/2023 4 to 5 Months 9/16/2023 6 to 11 Months 3/16/2024 12 to 23 Months</p> <p>Issuance Frequency 3 Month(s)</p> <p>Alternate Funding Medical Documentation Save Cancel</p> <p>TAB 100%</p>

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<p>10. Review Adult Participant's Food Prescription</p> <ul style="list-style-type: none"> • Select the adult participant icon in the carousel. • Verify the adult's Breastfeeding Status matches the infant. <p>In this example: participants are breastfeeding and receiving a full formula package.</p> <ul style="list-style-type: none"> • If all prescriptions are correct and the Breastfeeding statuses match, select save. 	
<p>11. Re-select Infant icon in Family Carousel.</p>	

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<p>12. Exchange Current Formula:</p> <ul style="list-style-type: none"> • Select Exchange/Increase Formula quick link under Issue Benefits. • Exchange or Increase Formula screen opens. • Review Current Month EBT Balance container for quantity still on EBT. • Select the Formula Being Returned: <ul style="list-style-type: none"> ○ Food Category = Infant Formula or Exempt Formula ○ Food Subcategory = Old formula ○ Quantity = # of unopened formula containers brought back to the clinic. ○ Quantity from EBT Account = # of formula containers remaining on the WIC EBT account. 	<div data-bbox="569 310 846 516"> <p>Issue Benefits</p> <ul style="list-style-type: none"> Prescribe Food Issue Food Instruments Food Instrument List Replace Current Benefits Exchange/Increase Formula </div> <div data-bbox="867 321 1990 634"> <p>Exchange or Increase Formula</p> <p>Select the Formula Being Returned</p> <p>Food Category: Infant Formula (IF) Food Subcategory: Similac Advance Powder 12.4 oz Quantity: 9 Cans Quantity from EBT Account: 9 Cans</p> <table border="1"> <thead> <tr> <th colspan="4">Current Month EBT Benefit Balance</th> <th>Total Items: 1</th> </tr> <tr> <th>Food Category</th> <th>Food Subcategory</th> <th>Quantity</th> <th>UoM</th> <th></th> </tr> </thead> <tbody> <tr> <td>Infant Formula (IF)</td> <td>Similac Advance Powder 12.4 oz</td> <td>9</td> <td>Cans</td> <td></td> </tr> </tbody> </table> <p>Select the Replacement Formula</p> <p>Food Category: Exempt Infant Formula (EIF) Food Subcategory: Enfamil Nutrangen Powder 12.6 oz Total Replaced Cans: 10</p> <p>Cans Originally Issued: 9 Total Returned Cans: 9 RFD Newly Prescribed: 006.00 Cans Newly Prescribed: 10 Cans After Proration: 0 Maximum Prescribed RFD: 506 Total RFD: 506</p> </div> <div data-bbox="569 654 1976 764"> <p>Current Month EBT Benefit Balance</p> <table border="1"> <thead> <tr> <th colspan="4">Current Month EBT Benefit Balance</th> <th>Total Items: 1</th> </tr> <tr> <th>Food Category</th> <th>Food Subcategory</th> <th>Quantity</th> <th>UoM</th> <th></th> </tr> </thead> <tbody> <tr> <td>Infant Formula (IF)</td> <td>Similac Advance Powder 12.4 oz</td> <td>9</td> <td>Cans</td> <td></td> </tr> </tbody> </table> </div> <div data-bbox="1050 781 1833 846"> <p>Formula benefits currently on the WIC EBT account.</p> </div> <div data-bbox="615 870 1675 1040"> <p>Exchange or Increase Formula</p> <p>Select the Formula Being Returned</p> <p>Food Category: Infant Formula (IF) Food Subcategory: Similac Advance Powder 12.4 oz Quantity: [] Cans Quantity from EBT Account: 9 Cans</p> </div> <div data-bbox="1066 1092 1778 1268"> <p>NOTE! If any formula being returned was purchased in the current benefit period, make sure you have the Quantity on hand before proceeding with the exchange. It can't be returned later.</p> </div> <p data-bbox="583 1357 1430 1390"><i>*In example above: no formula was purchased this benefit period</i></p>	Current Month EBT Benefit Balance				Total Items: 1	Food Category	Food Subcategory	Quantity	UoM		Infant Formula (IF)	Similac Advance Powder 12.4 oz	9	Cans		Current Month EBT Benefit Balance				Total Items: 1	Food Category	Food Subcategory	Quantity	UoM		Infant Formula (IF)	Similac Advance Powder 12.4 oz	9	Cans	
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<p>Exchange Current Formula <i>Continued:</i></p> <ul style="list-style-type: none"> • Select the Replacement Formula: <ul style="list-style-type: none"> ○ Food Category = Infant Formula or Exempt Formula. ○ Food Subcategory = New formula. • The system will automatically update the Total Replaced Cans. • Select Save. 	
<p>13. Confirm Formula Exchange:</p> <p>The system will redirect you to the Food Instrument List screen.</p> <ul style="list-style-type: none"> • Status Message will confirm benefits issued successfully. • Select Print Shopping List. See next page. 	



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<p>Confirm Formula Exchange <i>Continued:</i></p> <ul style="list-style-type: none"> • Review and confirm that family benefits now include new formula (Nutramigen). • If correct on shopping list, you know the benefits were successfully issued to the EBT account. 	<div style="border: 1px solid black; padding: 10px;"> <p style="text-align: center;">Shopping List Remaining Benefits Report Date: 07/05/2023</p> <p style="text-align: center;">Washington State WIC Nutrition Program</p> <p style="text-align: center;">Date: 07/05/2023 RDD: 1.1.12.1.8</p> <p style="margin-left: 20px;">Family ID: F05200003677 Head of Household: SAMANTHA MILLER</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="5" style="text-align: center;">Benefit Balance:</th> </tr> <tr> <th style="width: 20%;">Benefit Month</th> <th style="width: 10%;">Serial Number</th> <th style="width: 10%;">Quantity</th> <th style="width: 10%;">UOM</th> <th style="width: 50%;">Description</th> </tr> </thead> <tbody> <tr> <td>7/3/2023 thru 7/27/2023</td> <td>5325098</td> <td>\$69.00</td> <td>\$\$\$\$</td> <td>Fruit and Vegetables - Cash Value Benefit</td> </tr> <tr> <td></td> <td>5325098</td> <td>32</td> <td>Ounce</td> <td>Whole Wheat Bread or Whole Grains</td> </tr> <tr> <td></td> <td>5325098</td> <td>2</td> <td>Dozen</td> <td>Eggs - all WIC</td> </tr> <tr> <td></td> <td>5325098</td> <td>2</td> <td>CTNR</td> <td>Peanut Butter/Beans All WIC</td> </tr> <tr> <td></td> <td>5325098</td> <td>3.25</td> <td>Gallon</td> <td>Milk or Soy(1% & Nonfat) All WIC-Cow,Goat,Soy</td> </tr> <tr> <td></td> <td>5325098</td> <td>2</td> <td>Pound</td> <td>Cheese - all WIC</td> </tr> <tr> <td></td> <td>5325098</td> <td>3.25</td> <td>Gallon</td> <td>Milk - Whole All WIC-Cow,Goat,Lactose Free</td> </tr> <tr> <td></td> <td>5325098</td> <td>72</td> <td>Ounce</td> <td>Cereal All WIC -hot /cold</td> </tr> <tr> <td></td> <td>5325098</td> <td>2</td> <td>CTNR</td> <td>Juice - All WIC - 12 oz frozen or 46/48 oz liquid</td> </tr> <tr> <td></td> <td>5325098</td> <td>2</td> <td>CTNR</td> <td>Juice - All WIC - 64 oz carton</td> </tr> <tr style="border: 2px solid red;"> <td>7/5/2023 thru 7/27/2023</td> <td>5325098</td> <td>10</td> <td>Can</td> <td>Enfamil Nutramigen Powder 12.6 oz</td> </tr> </tbody> </table> </div>	Benefit Balance:					Benefit Month	Serial Number	Quantity	UOM	Description	7/3/2023 thru 7/27/2023	5325098	\$69.00	\$\$\$\$	Fruit and Vegetables - Cash Value Benefit		5325098	32	Ounce	Whole Wheat Bread or Whole Grains		5325098	2	Dozen	Eggs - all WIC		5325098	2	CTNR	Peanut Butter/Beans All WIC		5325098	3.25	Gallon	Milk or Soy(1% & Nonfat) All WIC-Cow,Goat,Soy		5325098	2	Pound	Cheese - all WIC		5325098	3.25	Gallon	Milk - Whole All WIC-Cow,Goat,Lactose Free		5325098	72	Ounce	Cereal All WIC -hot /cold		5325098	2	CTNR	Juice - All WIC - 12 oz frozen or 46/48 oz liquid		5325098	2	CTNR	Juice - All WIC - 64 oz carton	7/5/2023 thru 7/27/2023	5325098	10	Can	Enfamil Nutramigen Powder 12.6 oz
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