



Memorandum

#12-125

TO: WIC Regional Directors
WIC Local Agency Directors

FROM: Linda Brumble, Unit Manager
Nutrition Education/Clinic Services Unit
Nutrition Services Section

DATE: November 26, 2012

SUBJECT: Guidelines for Receiving Breast Pump Deliveries after December 1, 2012

This is an update to Memo #12-086, dated August 24, 2012, which mentioned enhancements being made to the online Breastfeeding Order System (BOS). These enhancements included the addition of an online receiving report for local agencies to complete upon each breast pump delivery starting **December 1, 2012**. However, until the accuracy of the online receiving report has been tested, all local agencies need to complete **both** the online receiving report located at, <http://texaswic.dshs.state.tx.us:4554/>, **and** the paper-based receiving report (included with received goods) until further notice.

Please review the following instructions prior to the December 1st implementation date and share with all staff involved in the process of ordering and receiving breast pumps from the State Agency.

As a reminder, all directors have the ability to log into the system and assign or revoke staff accessibility rights. Directors may need to verify or assign BOS accessibility rights to LA staff members responsible for receiving inventory from the state agency.

Guidelines for Directors to use to verify or assign BOS accessibility for LA staff:

1. Open the BOS at <http://texaswic.dshs.state.tx.us:4554/> and log in.
2. Click the *Admin* tab at the top right-hand corner of the screen.
3. Select *Security* in the top left-hand corner. It is located next to *Configuration* and is greyed-out until your mouse drags over the text. Once selected, a screen will appear with a list of staff with access rights.
4. Add staff who need the ability to submit receiving reports to the BOS.
 - a. If the staff member responsible for completing breast pump receiving reports is not listed, add them by clicking the *Create New User* option.
 - b. Staff responsible for the completion of breast pump receiving reports will need the right to *Read, Create, and Change BOS Data*, which is an option located in the dropdown menu under *BOS Roles*.
5. Select **save** before exiting this screen.

Guidelines for Local Agencies to follow when receiving breast pumps from the State Agency:

1. Complete paper receiving report.
 - a. Determine the quantity of inventory physically received upon the delivery of each shipment.
 - b. Compare the quantity received to the quantity documented on the paperwork sent from the shipping company.
 - c. Record the quantity received as well as any discrepancies on the paper-based *Breast Pump Receiving Report* and fax to **Scott Nelson at 512-341-4422** within 3 business days.
2. In addition, open the BOS at <http://texaswic.dshs.state.tx.us:4554/> and log in.
3. Click the *BOS* tab at the top right-hand corner of the screen.
4. Select the period the product received was ordered from located in the dropdown menu labeled *Period/State Fiscal Year*.
 - a. For example, products received in December 2012, were ordered during the September 2013 ordering period. Thus, local agencies will need to select *Sep2013* from the dropdown menu.
 - b. The products ordered during the selected period should appear along with an *Order Summary* menu on the right-hand side.
5. Select *Receive/Return Shipment* from the menu.
 - a. If you received Ameda products, then select *Create Receive/Return Shipment for Ameda/Evenflo*.
 - b. If you received Medela products, then select *Create Receive/Return Shipment for Medela*.
6. Select *Received* as the shipping type.
7. Select the date the shipment was received at your local agency.
8. Select the shipping company used and enter the corresponding tracking number.
9. To enter the quantity of inventory physically received for each product, follow one of the pathways provided below:
 - a. If inventory received matches exactly what was ordered and has no variances, enter the physical quantity received as the *number of units received* and select *submit*.
 - b. If the quantity received is greater than what was ordered, document the *number of units received* and select *submit*. Another document will need to be created and submitted to record the *return* of extra products.
 - c. If inventory received was damaged, document the *number of units received* and then document the quantity that was *damaged* and select *submit*. Another document will need to be created and submitted to record the *return* of damaged products.
 - d. If the quantity received is less than what was ordered, document the *number of units received* and then the quantity that is still needed as a *shortage* before submitting. For example, if 8 units were ordered, but only 7 were received, the *number of units received* would be documented as 7 and the *shortage* would be documented as 1.
 - e. If the quantity received was correct, but inventory was lost prior to locking it into inventory, document the *number of units received* and then document the quantity that was *lost or missing after delivery* before submitting.
10. If there are variances between the quantities received and the quantities ordered, contact the State Agency staff provided at the end of this memo, to ensure the correct pathway is used for receiving.

Guidelines for Local Agencies to use to reconcile breast pump orders against receiving reports:

1. Log in and click the *BOS* tab at the top right-hand corner of the screen.
2. Select the period the product received was ordered from located in the dropdown menu labeled *Period/State Fiscal Year*.

- a. For example, products received in December 2012, were ordered during the September 2013 ordering period. Thus, local agencies will need to select *Sep2013* from the dropdown menu.
- b. The products ordered during the selected period should appear along with an *Order Summary* menu on the right-hand side.
3. Select *Reconciled Order Summary* from the menu. The *Reconciled Order Summary* for the selected period should appear.
4. Compare the *Number of Units Ordered* for each product to the documented *Number of Units Received, Damaged, Shorted, Returned or Lost/Missing after Delivery*.
 - a. If there are unexplained variances, please double-check your records.
 - b. If the reason for the variance cannot be identified, contact the State Agency staff provided at the end of this memo for technical assistance.

Please remember the importance of completing the receiving reports accurately and within the required timelines. If a local agency should fail to accurately complete and submit breast pump receiving reports within three (3) business days of receiving a breast pump delivery, payment from the State Agency may be withheld. Thus, in order to receive monthly payments, it is essential for local agencies to reconcile inventory upon receiving it and document it within the BOS, as well as on the paper-based Breast Pump Receiving Report until further notice.

If you have questions or require additional information about the Breast Pump Program, please contact Lindsey Randall at 512-341-4594 or by email at Lindsey.Randall@dshs.state.tx.us, Cristina Garcia, at 512-341-4583 or by email at Cristina.Garcia@dshs.state.tx.us, or Tracy Erickson at 512-341-4521 or by email at Tracy.Erickson@dshs.state.tx.us.