Exchanging, Issuing and Managing Returned Formula

Purpose

To establish procedures for exchanging, issuing and managing returned formula.

Authority

State Policy

Policy

Formula can be exchanged using the MIS. Participants shall not receive more than the maximum amount of formula allowed by federal regulation.

Definitions

Returned Formula – Formula originally purchased by WIC that is returned to the clinic.

Donated Formula – Formula given to the WIC clinic that was not purchased with WIC, e.g., formula provided to participant by a healthcare provider, hospital, etc.

Procedures

I. Returning, Exchanging, and Issuing Formula using the MIS
   A. General Principles
      1. LA staff shall issue formula from the returned formula inventory, if available, to WIC participants for current month issuance and current month exchanges. Returned formula shall not be issued as part of advance month benefits.
      2. The amount of formula returned by participants shall be credited to inventory using the MIS.
3. If any formula was purchased, the parent/guardian shall bring the Texas WIC Card and unopened containers of formula to the WIC clinic. Participants should be informed that they may not receive an equal amount of containers in exchange. Cans that are not required as part of the exchange may be kept by the participant.

4. The LA is not required to accept or manage donated formula. If an LA chooses to accept donated formula, they shall develop a local policy for donated formula management.

5. The MIS may be used to increase (up to the federally allowed maximum) or decrease the quantity of formula, dependent on participant profile and/or breastfeeding frequency.

6. When returned formula inventory is available in the clinic, staff shall use formula from returned inventory in preference to issuing on the Texas WIC Card.

B. Exchanges Involving Returned Formula
   1. If requested formula is in clinic inventory, the MIS will display the amount during food benefit issuance. Staff may issue from stock, to Texas WIC card or drop-ship, as appropriate.
   2. Staff shall document returned formula in MIS and secure in a locked location.

C. Formula Inventory Management
   1. Returned formula shall be issued in a timely manner to prevent formula from expiring, i.e., issue out “earlier to expire” formula first.
   2. The MIS will maintain an inventory of returned, issued and shipped formula.
   3. Staff shall maintain the physical formula inventory in the clinic and document reason if one of the following applies:
      a. Damaged – when formula is damaged while in storage or when returned during an exchange transaction.
      b. Expired – unused formula stored in clinic or drop-shipped with an expiration date that has passed.
      c. Other – indicate reason for return.
4. Handling expired and damaged formula -
   a. Expired Formula –
      i. If it is not possible to relocate returned formula before the expiration date, the formula shall be disposed of.
      ii. Expired formula shall not be provided to participants, whether returned or donated.
   b. Damaged Formula – LAs shall accept damaged cans of formula when exchanging formula for valid reasons, if the total number of containers returned is no more than the maximum amount originally issued to the participant for the current month.
      i. The quantity of returned and accepted damaged formula containers shall be entered in the MIS and will be included in the count considered for formula exchange.
      ii. Open containers of formula shall not be accepted or included in MIS inventory.
   c. Disposal of Expired and Damaged Formula
      i. Expired and damaged formula will be disposed of by opening each can and discarding the contents (sink or trash can) in the presence of a witness (staff member).
      ii. Staff shall document quantity of formula and the names of staff members in note section of MIS Formula Inventory.

D. LA staff will coordinate with SA regarding unreconciled inventory.
E. LA staff will have access to statewide formula inventory. Refer to Clinic Assessment Management for more information.

Note – Exchanging Food Packages moved to FD 12