

# Checks – Void & Replace, Unvoid, & Reissue Formula Checks

This module applies to the following security roles:

Clerk  
RN/RD



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**This module requires use of the computer and the on-line KWIC Training Application.**

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### Notes about the training environment:

- When you issue checks in the training environment, there will be no checks actually printed. KWIC will record the action as if checks were printed and display a message stating that printing checks is simulated.
- Some parts of screen shots in the modules will not match what you see in training. The training environment is “redated” each month so the clients stay the same age. Also, food packages for infants and children are based on the client’s age every day the Assign Food Package screen is opened so there may be a difference depending on when in the month the module is completed. If something seems drastically wrong, please contact Patrice Thomsen at [pthomsen@khdeks.gov](mailto:pthomsen@khdeks.gov) or 785-296-1189.
- Security clearance in the training environment is “wide open” so clerks may perform the same functions as RNs and RDs. The modules contain notes about security clearance limits in “real” KWIC.



Before starting this module, have you...

- Completed the module titled, [WIC Approved Foods, Base Food Packages & Printing Checks](#)? It was part of Level 1 training. That foundation is important for understanding this module.
- Completed the [Food Packaging Tailoring & Special Authorization](#)” module (only RNs & RDs – Level 2 training)

## Objectives

Upon completion of this activity, the employee will be able to:

1. Identify when to use Void & Replace Checks, Unvoid, and Reissue Formula Checks.
2. Void and replace checks.
3. Unvoid checks that were mistakenly voided.
4. Reissue checks using Reissue Formula Checks.
5. Reissue checks to increase formula for an infant fed both breastmilk and formula.

# Policies to Review

[FCI 04.04.00 Voiding and Replacing Checks](#)

[FCI 04.05.00 Lost or Stolen Checks](#)

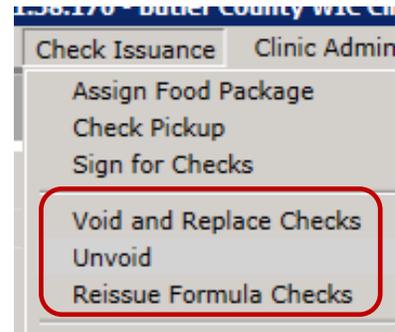
[FCI 04.06.00 Replacement for Damaged or Destroyed Checks](#)

[FCI 02.05.00 Documentation and Use of Returned Formula](#)

## Introduction

This module presents three features of KWIC:

- Void & Replace
- Unvoid, and
- Reissue Formula Checks.



Use the **Void and Replace Checks** screen to void or void and replace checks for various reasons.

The **Unvoid** screen displays the checks issued to the selected client that have been previously voided. In certain circumstances, this screen can be used to remove the "Void" status from checks previously voided.

The Void and Replace screen cannot be used to change a food package if some or all of the checks have been redeemed for a particular month. The exceptions are medically necessary changes to food packages with formula or medical foods. The **Reissue Formula Checks** screen is designed to meet this need.

Each of these features can be completed by anyone with KWIC security clearance for clerk, RD, or RN. If any of the replacement checks require special authorization or tailored food package, the RN or RD will need complete those actions. Then when the client arrives, the clerk could actually replace the checks with the new food package or reissue the formula checks.

According to policy [FCI 04.04.00 Voiding and Replacing Checks](#), checks must be in the possession of WIC staff before they are voided. Local staff members may grant an exception when following [FCI 04.05.00 Lost or Stolen Checks](#) or [FCI 04.06.00 Replacement for Damaged or Destroyed Checks](#). Other exceptions may be approved by the State Agency staff. For example, an exception might be given when a child changes custody to a foster parent and efforts to obtain the original checks are unsuccessful.



Note: “Current checks”, “valid checks”, “active checks” – All of these terms mean checks in which today’s date is within the first and last days of use.

Also, checks are referred to by the month in which they are originally issued. For example, checks with a first use date of 9/9/2013 and last use date of 10/9/2103 are called the “September checks”.

## First Things First

**Your initial step is to look at the use dates on the original checks.** Today's date should be between the first use date and the last use date of the checks being returned or the check that was redeemed for the formula being returned. Policy does not allow replacing formula/checks if it is past the last use date of the checks. If it is after the

last use date, thank the client and shred the returned checks and/or collect the returned formula and follow [FCI 02.05.00 Documentation and Use of Returned Formula](#).

## Preview - When to Use Void & Replace Checks versus Reissue Formula Checks

The following is a preview to provide a frame of reference about when to use Void and Replace Checks versus Reissue Formula Checks.

### Use Void and Replace Checks when:

- The client returns for a change to their food package, (by either a doctor’s recommendation or caregiver’s request) and has **all** of the issued checks with them.
  - *If any of the current checks have been used, then only any future issuance can be voided and replaced. (The ONLY exception is when formula needs to be changed or is added. You MUST use Reissue Formula Checks when this happens.)*
- The client states they lost any of their checks, brings you damaged checks, or states their checks were lost/stolen even if they have cashed one or more.
  - *Food package changes are not allowed in this type of case.*
  - You need to completely void current or future issuance periods.



**DO NOT USE VOID AND REPLACE CHECKS for the whole month if ANY issuance check has been used by the client.**

### Use Reissue Formula Checks when:

- A client needs to use a different formula during the current issuance period (by either a doctor's recommendation or caregiver's request), **AND** has cashed at least one check **AND** brings in the remaining formula (and/or any unspent checks for the current month).
  - *If the client has consumed all of their formula for the current issuance period, then NO additional formula may be issued. Use Void and Replace for any future issuance to be changed.*
- A client needs additional formula (food package permitting).
  - *For example: the client has stopped breast feeding and needs to be issued additional formula to compensate.*

### When to use Reissue Formula Checks along with Void and Replace

- Use Reissue Formula Checks along with Void and Replace to generate new checks for formula when the client needs a different formula package **and**:
  - All or part of the current active checks has been redeemed and the caregiver brings in purchased formula and/or remaining checks for the month. (Use Reissue Formula Checks for this action.) **and**
  - Future months have already been issued and the caregiver also brings in those future checks to be changed. (Use Void and Replace Checks for this action.)

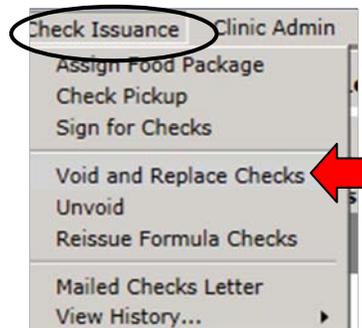
Now let's look at all three features in detail.

## Void & Replace

Use the Void and Replace Checks screen to void or void and replace checks.

You must have a client record open to access Void and Replace Checks from the Check Issuance dropdown menu.

This menu item consists of a series of windows. The first window is divided into three parts. For this example, **retrieve the record of Lisa Lettuce**, a child. Go to the Check Issuance dropdown menu and select Void and Replace Checks.



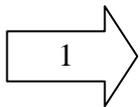
Click along to see the actual screens and compare to the screen shots in the module.

First we'll look at the screen in general and then go through specifics.

The first screen is divided into three parts.

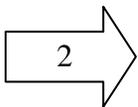
The screenshot shows a software interface titled "Void and Replace Checks" with a user name "Lisa". The interface is divided into three sections:

- Section 1:** "What would you like to do?" with three radio button options:
  - Void the Checks I select. I do not want to issue replacement Checks.
  - Void the Checks I select and issue replacement Checks with the original food package.
  - Void the Checks I select and issue replacement Checks with a new food package that I will choose.
- Section 2:** "Why are you voiding Checks?" with a dropdown menu.
- Section 3:** "Select the months you want to void:" with a list of months and checkboxes:
  - August, 2013 - No Checks to Void for the Month.
  - September, 2013
  - October, 2013
  - November, 2013

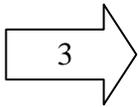


In the top section, select the desired action by checking the appropriate box:

- Void the Checks I select. I do not want to issue replacement Checks. (**Void Only**)
- Void the Checks I select and issue replacement Checks with the original food package. (**Void and Replace**)
- Void the Checks I select and issue replacement Checks with a new food package that I will choose. (**Void and Replace with different food package.**)



In the middle section, you select an answer to the question, "Why are you voiding Checks?" As elsewhere in KWIC, if you choose "Other" you should open the regular Note screen and make a note of explanation.



In the bottom section, you select the month/s of checks to be voided. Here is a list of all the months that have checks available to void (checks that are not redeemed and are not past the last day to use. The month is determined based on the first day to use printed on the check. (Remember that the KWIC training environment "redates" every month, so your training screens will have different months from these examples.) Uncheck the box next to the month if you not want to void any of that month's checks. (Click in the box to remove the check.)

KWIC defines a check “set” as all of the existing checks for a month, regardless of how they were issued. For example, all checks with a first use date of 09/12/2013 will now constitute the “September, 2013” set of checks.

Using the above definition for a set of checks, KWIC will determine if any of the checks in the set have been marked “Redeemed”. If so, WIC staff members are limited to the 2<sup>nd</sup> option, to void and print replacement checks for the same food package. The entire month cannot be selected to void or void/replace with a new food package. This is a great feature. This is now way to mistakenly void checks the client has already redeemed (*as long as the store deposited the checks and they have gone through the banking service – usually a couple days.*).



### **Void the Checks I select. I do not want to issue replacement Checks**

Click in the first choice for Lisa Lettuce – “Void the Checks I select. I do not want to issue replacement Checks.

#### **Void and Replace Checks**

What would you like to do?

- Void the Checks I select. I do not want to issue replacement Checks.**
- Void the Checks I select and issue replacement Checks with the original food package.
- Void the Checks I select and issue replacement Checks with a new food package that I will choose.

This option is just for voiding checks. Once voided, you can still access Food Package Assignment and create Tailored or Special Authorization Food Packages. Be aware that the potential for changing the client’s first use date of the issuance is critically HIGH, depending on which month’s issuance you are voiding.

You will rarely use this option. Sometimes a client moves out of state and the other state’s staff will mail you back the checks. If there is a reason not listed, use “Other” and open the regular Note screen and make a note of explanation. For example a client asked to be removed from the program and gives back the checks. You would select “Other” and make a note.

For Lisa, select the reason - “Transferred out of state.”

Now you need to determine what months are to be voided. With this option there is a special rule - the month check boxes will auto-select future months when a month is selected. For example, if September is marked in the screen

Select the months you want to void:

**August, 2013 - No Checks to Void for the Month.**

- September, 2013**
- October, 2013**
- November, 2013**

shot example, October and November are automatically selected. For Lisa, try to “uncheck” the second month of checks by clicking in the box. KWIC will not let you. (Remember that your months will be different than the screen shot.)

Let’s move on...Be sure all the possible months are checked.

Click Next to open the second Void & Replace screen. The second screen displays differently for each of the options on the first screen.



Notice the only choice you can make here is to void the entire month. Click in the first Void Month check box. Notice that both months become checked.

<b>Lisa Lettuce</b> 10357653 Gender Female DOB 04/21/2011, 2 Years 4 Months				<b>WIC Active C</b> Cert. Period 09/02/2013 to 03/31/2014 Priority 3	
<< Void and Replace Checks <input checked="" type="checkbox"/> Lisa		Notices <input checked="" type="checkbox"/> Lisa			
<b>Void and Replace Checks</b> Select the Checks You Would Like To Void/Replace.					
<b>September, 2013</b>					
Issued Date	First Use	End Use	Check #	Food Package Sequence	Void Month <input type="checkbox"/>
9/2/2013	9/5/2013	10/5/2013	1035297609	Child 2 to 5 yr old (PB) - 1	<input type="checkbox"/>
	9/5/2013	10/5/2013	1035297610	Child 2 to 5 yr old (PB) - 2	<input type="checkbox"/>
	9/5/2013	10/5/2013	1035297611	Child 2 to 5 yr old (PB) - 3	<input type="checkbox"/>
<b>October, 2013</b>					
Issued Date	First Use	End Use	Check #	Food Package Sequence	Void Month <input type="checkbox"/>
9/2/2013	10/5/2013	11/5/2013	1035297612	Child 2 to 5 yr old (beans) - 1	<input type="checkbox"/>
	10/5/2013	11/5/2013	1035297613	Child 2 to 5 yr old (beans) - 2	<input type="checkbox"/>
	10/5/2013	11/5/2013	1035297614	Child 2 to 5 yr old (beans) - 3	<input type="checkbox"/>
<b>November, 2013</b>					
Issued Date	First Use	End Use	Check #	Food Package Sequence	Void Month <input type="checkbox"/>
9/2/2013	11/5/2013	12/5/2013	1035297615	Child 2 to 5 yr old (PB) - 1	<input type="checkbox"/>
	11/5/2013	12/5/2013	1035297616	Child 2 to 5 yr old (PB) - 2	<input type="checkbox"/>
	11/5/2013	12/5/2013	1035297617	Child 2 to 5 yr old (PB) - 3	<input type="checkbox"/>

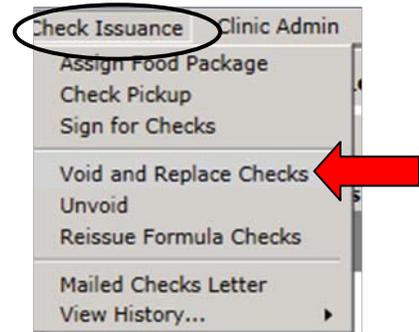
***We want to keep working with Lisa as our example, so do NOT click the Void/Replace button. Click Cancel for Lisa now.***

**If you did want to finish**, you would click in the Void Month check box. No saving needed.



Because we want to continue working with Lisa, click Cancel.

There will be a warning message. Click No. You will return to Lisa’s Notices tab.



Open Void and Replace Checks again and we'll proceed with the next possibility.

### ***Void the Checks I select and issue replacement Checks with the original food package.***

Continuing to use Lisa Lettuce, now click in the second choice– ‘Void the Checks I select and issue replacement Checks with the original food package.

#### **Void and Replace Checks**

What would you like to do?

- Void the Checks I select. I do not want to issue replacement Checks.
- Void the Checks I select and issue replacement Checks with the original food package.
- Void the Checks I select and issue replacement Checks with a new food package that I will choose.

Use this option if the client brings in a **COMPLETE** set of checks requesting a change to their food package, ensuring that **none** of the checks have been redeemed by the caregiver or client. If the client has cashed **ANY** of the checks from the set, then **do not** proceed with Void and Replace. Remember, *this option will require you to void all future issuance as well*, since the KWIC software thinks that you want to replace those checks with the new food package as well.

***A major difference with this void and replace option is that a single month may be selected.*** For instance a client damaged one of the checks for the current month, there is no reason to void and replace checks for future months.

For Lisa, click in the reason drop-down and select “Check damaged.”

Why are you voiding Checks?

Check damaged

Now you need to determine what months are to be voided. In our example, she damaged a check in set of the first available month. Uncheck the last two months.

Select the months you want to void:

- August, 2013 - No Checks to Void for the Month.**
- September, 2013**
- October, 2013**
- November, 2013**

Click Next to open the second Void & Replace screen.

<<< Back   Next >>>   Void/Replace   Cancel

The second screen displays differently for each of the options on the first screen. If you had left all three months checked on the first screen because all of the checks need replaced, then all three months display on this second screen.

**Void and Replace Checks**

Select the Checks You Would Like To Void/Replace.

September, 2013

Issued Date	First Use	End Use	Check #	Food Package Sequence	Replace
9/2/2013	9/5/2013	10/5/2013	1035297609	Child 2 to 5 yr old (PB) - 1	<input checked="" type="checkbox"/>
	9/5/2013	10/5/2013	1035297610	Child 2 to 5 yr old (PB) - 2	<input checked="" type="checkbox"/>
	9/5/2013	10/5/2013	1035297611	Child 2 to 5 yr old (PB) - 3	<input checked="" type="checkbox"/>

Replace All  
Clear

Notice that there is a Replace checkbox for each check. Click in the box to select each check you want to void and replace with a new check (i.e. a replacement check).

In this example, consider that Lisa’s first check of the current month was damaged and needs replacing. Uncheck the second and third check in the set.

**Void and Replace Checks**

Select the Checks You Would Like To Void/Replace.

September, 2013

Issued Date	First Use	End Use	Check #	Food Package Sequence	Replace
9/2/2013	9/5/2013	10/5/2013	1035297609	Child 2 to 5 yr old (PB) - 1	<input checked="" type="checkbox"/>
	9/5/2013	10/5/2013	1035297610	Child 2 to 5 yr old (PB) - 2	<input type="checkbox"/>
	9/5/2013	10/5/2013	1035297611	Child 2 to 5 yr old (PB) - 3	<input type="checkbox"/>

Replace All  
Clear

If you want to view what foods were on what check, use the View feature for checks. This can be found on various screens like Check History and Assign Food Package.

Now we are going to actually complete the void and replace.



Click the Void/Replace button.

As soon as you click Void/Replace, the void occurs and the replacement checks are printed. An acknowledgement displays.

The following Checks have been sent to the printer as requested:

Check Number	Client Name	Client ID	Food Package	Seq	Month
1035297757	Lisa Lettuce	10357653	Child 2 to 5 yr old (PB)	1	September, 2013



Remember to have the client sign electronically for the replacement checks.

**Void the Checks I select and issue replacement Checks with a new food package that I will choose.**

This choice is only allowed if clients are returning a full month worth of checks – no checks for that month have been redeemed. As stated in policy [FCI 02.04.00 Tailoring a Food Package](#), “Except for medically necessary changes involving formulas and medical foods, once checks have been issued, food packages will only be changed if none checks for the issuance month have been redeemed.” (Later in this module you will learn about Reissue Formula Checks, the KWIC feature that allows you to change a food package with formula if some or all of the checks for a month have been redeemed.)

As with the Void only choice, when you select a month check box, KWIC will also auto-select future months. For example, if September is marked in the screen shot example, October and November is automatically selected.

Special note on security clearance...

This choice usually involved tailoring a food package and KWIC security clearance of RN or RD is required to tailor. Therefore, a clerk can complete this option only if the RN or RD knows in advance to tailor the food package for the client. Then the clerk can find the new tailored food package to assign.

**Void the Checks I select and issue replacement Checks with the original food package – 2<sup>nd</sup> screen**

This screen is like you’ve learned with the other options.

**Void the Checks I select and issue replacement Checks with a new food package that I will choose – 2<sup>nd</sup> screen**



This screen is like you’ve learned with the other options EXCEPT the only choice you can make here is to void the entire month. In general, if any of the checks for a month have been cashed, the client has to wait until the next month to change the food package.

EXCEPTION – If the client was assigned formula and has cashed any or all of the checks for a certain month, and the food package has changed to a different formula, staff can use the Reissue Formula feature of KWIC - as

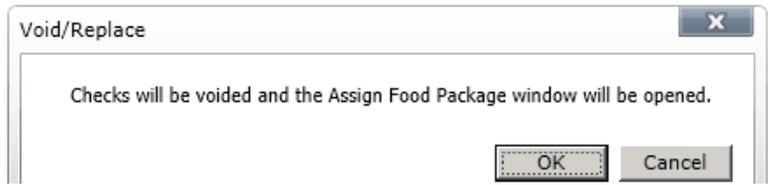
you will see later.

Another thing to remember is the First use date will change to today’s date.

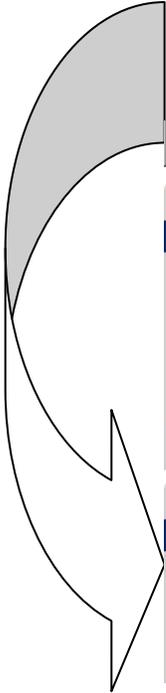
Click Void/Replace.



But unlike the other two options, you are **not** done. At this point, KWIC will display the message, “Checks will be voided and the Assign Food Package window will be opened.” Click OK and the Assign Food Package window will display.



The original checks have been voided, but the replacement checks need to have a food package assigned and saved. Because the original checks have been voided, you will look for them to tailor in the center section of Assign Food Package.



Assign Food Package Arthur    Notices Arthur

**Food Package Assignments For Printed Checks With Current Or Future Dates**

Client's Age	First Use Date	Base Food Package	Assign Food Package	
4 Years 0 Months	08/23/2013	Child 2 to 5 yr old (beans)	1T - 4b beans	<a href="#">View</a> <a href="#">Tailor</a> <a href="#">Special Authorization</a>

**Food Package Assignments For Checks That Can Be Printed**

Client's Age	First Use Date	Base Food Package	Assign Food Package	
4 Years 1 Months	09/23/2013	<a href="#">Child 2 to 5 yr old (PB)</a>	2T - 4b PB	<a href="#">View</a> <a href="#">Tailor</a> <a href="#">Special Authorization</a>
4 Years 2 Months	10/23/2013	<a href="#">Child 2 to 5 yr old (beans)</a>		<a href="#">View</a> <a href="#">Tailor</a> <a href="#">Special Authorization</a>
4 Years 3 Months	11/23/2013	<a href="#">Child 2 to 5 yr old (PB)</a>		<a href="#">View</a> <a href="#">Tailor</a> <a href="#">Special Authorization</a>

Tailor as appropriate. (Sometimes you will need to enter a Special Authorization as described in a different module.) Assign and Save.

Finally, open Check Pickup and print the replacement checks. (In real life you would also have her sign for the checks.)



What effect does security clearance of clerks have on using Void & Replace?

Clerks can complete the first two options completely – just void or void and replace with the same food package. But, for the third option, void and replace with a new food package, a RN or RD usually must be involved except if the client is going back to an old food package that the clerk can select from the Assign Food Package drop down list.

If staff know in advance what the new food package should be, it is possible for a RN or RD to click on the Tailor link in advance and tailor a new food package. Then when the clerk uses Void and Replace with a new food package, those checks are available when

the Assign Food Package screen opens at the end of Void & Replace. But it is probably easiest to have the RN or RD do the whole process

Before printing, always use the KWIC View checks link and confirm the food package with the client. Clerks may need to spend some extra time talking with the RN or RD to understand the code that displays for tailored food packages in the Assign Food Package window.



## Skill Builder

1. Retrieve the record of the child **Paula Pepper**. Pansy, Paula’s mother, is in clinic saying that she just doesn’t want WIC anymore and gives you the unspent checks. Open Void & Replace. Use the **first option** -“Void...I do not want to issue replacement checks.” Use “other” for a reason. Be sure to open Notes and make an explanatory note. Review the results in Check Issuance –View History – Checks. Notice Check Status and Reason.
2. Retrieve the record for **Arthur Asparagus**. All of the issued checks went through the washing machine. His mother brought in the checks so you can confirm that they are all there. Open Void & Replace. Use the **second option** - “Void...issue replacement checks with the original food package. Select “Check damaged” as a reason. Review the results in Check Issuance –View History – Checks. Notice Check Status and Reason.
3. Retrieve the record for **Kelly Kiwi**. Open Void & Replace. Use the **third option** -“Void...issue replacement checks with a new food package that I will choose.” Select “Food package change” as a reason.  
Remember normally, if you are going to void and replace with a new food package, you will need to tailor a food package. In this example, to be easy, we are going to pretend that she wants the base food package instead of the tailored food package she has now. If you are a clerk, you will not be able to tailor in real life but you can select the base food package.
  - a. When Assign Food Package opens, look for the month you are replacing and select Pregnant or Mostly BF. Save.
  - b. Open Check Pickup and print the replacement checks.
  - c. Review the results in Check Issuance –View History – Checks. Notice Check Status and Reason.
4. Retrieve the record for **Patsy Pea**. Open Void and Replace. Her last check in the current check set was damaged. Her mother brought it back, so you can confirm it was the first check in the set. Use the second Void and Replace option – Void and Replace with the same food package with a reason of “Check Damaged”. On

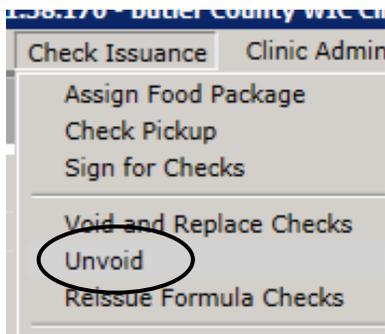
screen 2 of Void and Replace, select only the third check in the set to Void and Replace.

## Unvoid



All of us mistakenly void checks. The Unvoid screen is available to correct such a miss-step and for other limited reasons. BUT, for fraud prevention, there are restrictions. *You cannot unvoid checks when replacement checks have been issued.* So you still need to be careful with Void and Replace.

Open Unvoid from the Check Issuance dropdown menu.



To unvoid a check:

1. Find and retrieve the client.
2. Select Unvoid from the Check Issuance menu.
3. Check the Unvoid checkbox next to every check that is to be un-voided.
4. Check "Unvoid". The Checks marked will be unvoided.

## Skill Builder

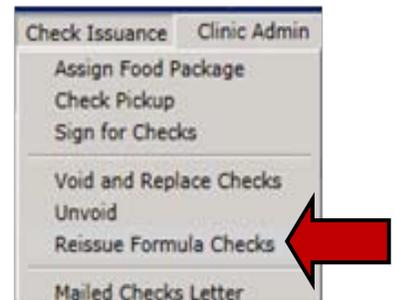


☺ This example is rather a stretch, but you get the idea.

In the previous Skill Builder you voided the checks for **Paula Pepper** without issuing replacement checks. After talking more with staff, Paula's mother, Pansy decides she does want Paula to have WIC after all and you have not shredded them yet. Unvoid her checks.

## Using Reissue Formula Checks

The client must have been issued checks with a first use date prior to today (the day formula is being reissued) and a last use date after today to use the Reissue Formula Checks screen.



If the client has no checks with a first use date prior to today and a last use date after today, a message stating “There are not Checks that can be issued” displays. Look at Assign Food Package or Check History to see use dates of checks.



With Reissue Formula Checks, the first use date on the new checks will be the same as the date on the original checks. That might mean the caregiver has a very short time to use the checks!

**Once you’ve decided that you need to use Reissue Formula Checks, follow this basic procedure. Read the procedure now, then it will be repeated with more comments and example screen shots.**

1. Retrieve the client’s KWIC record.
2. Update the Health Interview as needed (Breastfeeding Status, Formula, etc.)
3. Review Check Issuance-History-Checks to determine if the formula should be replaced.
4. Tailor and assign the new formula-containing food package for the first use date being reissued.
5. Select Reissue Formula Checks from the Check Issuance menu.
6. The Reissue Formula Checks window displays checks issued with end use dates in the future. If the checks are not redeemed and contain formula, the Void and Replace check box appears with "Contains Formula" in red. If there are unredeemed formula checks that the client is returning, along with cans of formula, mark checks to be voided and replaced by clicking to check the box.



7. Enter the number of units returned by the client. KWIC adds the units returned to the units on the checks being replaced, and displays the total equivalent units to reissue, out of the food category limit for the base food package.
8. Enter the reason for reissuing formula in the Notes field (and any other desired information).
9. Enter the quantity of containers of new formula to issue. Usually it will be the amount suggested by KWIC. The most common exception is if formula is being added to the food package of a breastfed infant.
10. Click **[Reissue]** to print the new checks.

Click along with this simple example of exchanging powdered Similac Advance powder for Similac Ready-to-feed because of well water contamination. Tailoring will be needed, but not special authorization.

**Barry Bean's mother, Betty**, comes to clinic with **5 cans** of powdered Similac Advance powder. Today they learned their well is contaminated, so she wants to exchange the powdered formula for Similac Advance ready-to-feed (32-ounce).

1. **Retrieve the record** for Barry Bean.
2. **Update formula information on the Health Interview.**
3. **Review check issuance** to determine if the formula should be replaced.

Your first step is to check when the last day to use of the redeemed checks. If he is due for new checks (with a first use date of today), you will just take the returned formula without giving any in return.

To check dates easily, you can open Assign Food Package. Remember, if the client has been issued checks with a Last Day to Use that is greater than or equal to today, those checks will display in the top section.

**\*\*This example is being done on Oct. 2. Your dates will be different. \*\***

Barry Bean		WIC Active I	
10358808	Gender Male	Cert. Period 09/30/2013 to 09/30/2014	
DOB 09/11/2013, 0 Months		Priority 1	
Assign Food Package Barry		Notices Barry	
Food Package Assignments For Printed Checks With Current Or Future Dates			
Client's Age	First Use Date	Base Food Package	Assign Food Package
0 Months	09/30/2013	Formula Fed < 4 mo old	Formula Fed < 4 mo old View Tailor Special Authorization
Food Package Assignments For Checks That Can Be Printed			
Client's Age	First Use Date	Base Food Package	Assign Food Package
1 Months	10/30/2013	Formula Fed < 4 mo old	Formula Fed < 4 mo old View Tailor Special Authorization
2 Months	11/30/2013	Formula Fed < 4 mo old	Formula Fed < 4 mo old View Tailor Special Authorization
3 Months	12/30/2013	Formula Fed < 4 mo old	View Tailor Special Authorization

To get the full picture, you will also want to look at Check Issuance – View History – Checks to look at the individual checks and whether or not the system shows them as redeemed. This will also show if there are future checks issued.

Open Checks Issuance – View History – Checks for Barry. You see that he is not due more checks until the end of this month, he was only issued one check and it is

**redeemed.** As a result of this information, you know to just use Reissue Formula Checks. (If there were future checks, you would also use Void and Replace for those checks.)

Reminder – This example is quite straight-forward. **In clinic you will have to ask more questions.** For instance if a check is not redeemed in KWIC, you should still ask if the checks have been used at the store because it takes a couple days after the store deposits the check before it shows as redeemed in KWIC.



- Tailor and assign the new formula-containing food package** for the first use date being reissued. You (or a CPA if you are a clerk) proceeds to create a tailored food package for this check. If this was a formula that required Special Authorization, your next step is the enter the new Special Authorization. In this case, you can proceed to Tailor. (These steps are presented in more detail in the Food Package Tailoring and Special Authorization module.) If you are a clerk, you can still click along with the tailoring steps in the training environment

Click on the Tailor link for the the appropriate checks. The first Tailor screen opens.

Because this task does not require special formula authorization, there is no column of “Issue” check boxes on the right side of each line. So all you have to do is:

- find the Similac Advance RTF 32 oz.,
- enter the maximum quantity, and
- delete the old formula quantity.

Barry Bean		WIC Active I	
10358808	Gender Male	Cert. Period 09/30/2013 to 09/30/2014	
DOB 09/11/2013, 0 Months		Priority 1	
« Tailor Food Package ☒	Assign Food Package ☒	Notices ☒	
Barry	Barry	Barry	
Show: <input checked="" type="radio"/> Available Foods		<input type="radio"/> Selected Foods	
		<a href="#">Authorize Special F</a>	
1a-FF - Formula Fed < 4 mo old	Current	Limit	
<input type="checkbox"/> Formula	810	0 - 896 ounces	
Enfamil ProSobee concentrate		0 - 31 containers	
Enfamil ProSobee powder		0 - 9 containers	
Enfamil ProSobee RTF		0 - 26 containers	
Similac Advance concentrate 13 oz.		0 - 31 containers	
Similac Advance powder 12.4 oz	9	0 - 9 containers	
Similac Advance ready-to-feed 32 oz.		0 - 26 containers	
Similac Advance RTF (8 oz bottle)		0 - 104 containers	
Similac for Spit-Up powder		0 - 9 containers	

If this was a formula requiring special authorization you also would have to check the Issue box for every item you want to issue. (See the Food Package Tailoring & Special Authorization module.)

Click Next and the second Tailor screen appears. You will:

- review the food package in the left section,
- select the distribution strategy (usually Default), and
- write a note. Upon saving, this note will display in the regular note list.

**Barry Bean**      **WIC Active I**  
 10358808 Gender Male      Cert. Period 09/30/2013 to 09/30/2014  
 DOB 09/11/2013, 0 Months      Priority 1

Tailor Food Package Barry   
  Assign Food Package Barry   
  Notices Barry

---

**1a-FF - Formula Fed < 4 mo old**

**Formula**  
 Similac Advance ready-to-feed 32 oz.    26 containers

**FVC Distribution**  
 1 Check  
 2 Checks

**Distribution Strategy**  
 Default  
 Shopping Limitations  
 Storage Limitations

**Notes**  
 Contaminated well water

Save.

The Tailor Food Package validation message will appear. If the information is correct, click OK. The new tailored package will save and the Tailor screen automatically closes.



You are back to the Assign Food Package screen.

The new food package code displays in the Assign Food Package dropdown, but use the View link to be sure you are working with the food package you expect.

**Barry Bean**      **WIC Active I**  
 10358808 Gender Male      Cert. Period 09/30/2013 to 09/30/2014  
 DOB 09/11/2013, 0 Months      Priority 1

Assign Food Package Barry   
  Notices Barry

---

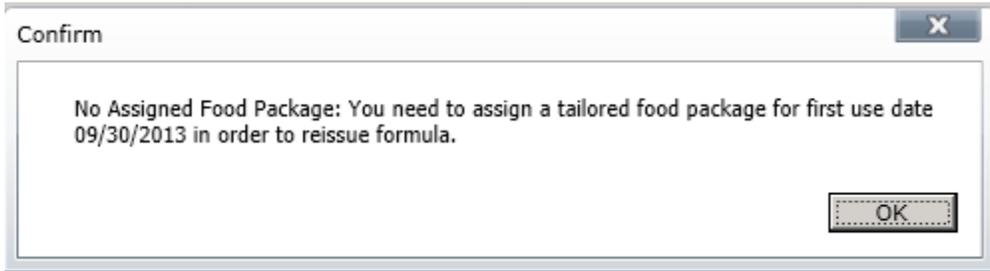
**Food Package Assignments For Printed Checks With Current Or Future Dates**

Client's Age	First Use Date	Base Food Package	Assign Food Package	
0 Months	09/30/2013	Formula Fed < 4 mo old	Formula Fed < 4 mo old	<a href="#">View</a> <a href="#">Tailor</a> <a href="#">Sj</a>
			Formula Fed < 4 mo old	
			1T - 1a-FF	



Save.

If you forget to assign a new food package and go straight to Reissue Formula Checks, KWIC will gently remind you with a pop-up confirmation message.



5. **Select Reissue Formula Checks from the Check Issuance menu.** Remember Barry's mom brought 5 cans of powdered Similac Advance powder to exchange for ready to feed due to a contaminated well.

Checks issued to the client that are still within the first and last use dates will be displayed in the top section.

If a current issued check contains formula, KWIC displays that fact here. If the formula check has not been redeemed, a Void & Replace Checkbox will display. Non-formula checks are displayed only for information purposes. Always ask if the check has been redeemed because it may not be through the banking system yet.

Checks that are marked Redeemed in KWIC will not have a Void & Replace checkbox - as in this example.

Reissue Formula Checks Barry Notices Barry

**Reissue Formula Checks** Select the formula Checks that the client

Check #	Issued	First Use	End Use	Food Package	Void & Replace
1035297375	9/30/2013	9/30/2013	10/30/2013	Formula Fed < 4 mo old - 1	Redeemed <b>Contains Formula</b>

**Formula Returned** Enter the number of containers brought to the clinic by the client.

Formula	Qty	Notes
12.4 oz Similac Advance powder 70074-55958	<input type="text"/>	

**Replace Formula** [Assign Food Package](#)

Assigned Food Package **1T - 1a-FF**

Select Formula to Reissue  Similac Advance ready-to-feed 32 oz.

Units Issued on selected checks

Total equivalent containers to reissue  of

Units returned by the client

Containers to reissue

**Checks Printed** The following Checks have been sent to the printer as requested:

Check #	Client Name	Client ID	Food Package	Seq	Month
---------	-------------	-----------	--------------	-----	-------

Reissue Cancel

6. Step 6 does not apply in this example because the client redeemed all the checks for formula, but here is the information... The Reissue Formula Checks window displays checks issued with end use dates in the future. If the checks are not redeemed and contain formula, the Void and Replace check box appears with "Contains Formula" in red. If there are unredeemed formula checks that the client is returning, along with cans of formula, mark checks to be voided and replaced by clicking to check the box:



7. Enter the number of units returned by the client. (Five in this example.)

KWIC adds the units returned to the units on the checks being replaced, and displays the total equivalent units to reissue, out of the food category limit for the base food package. (Fourteen in this example.)

8. Enter the reason for reissuing formula in the Notes field (and any other desired information you'd like to show up in the automatic Note).

9. Enter the quantity of containers of new formula to issue. Usually it will be the amount suggested by KWIC unless you have different instructions from the Help Desk or State WIC Office. The most common exception is if formula is being added to the food package of a breastfed infant. Enter 14 cans for this example.

10. Click **[Reissue]** to print the new checks. Reissue

After clicking the Reissue button, KWIC will print the checks for the same first and end use dates as the original checks. The check information displays in the bottom portion of the screen. Notice the Food Package name for Replacement checks begins with "R\*".

**Checks Printed** The following Checks have been sent to the printer as requested:

Check #	Client Name	Client ID	Food Package	Seq	Month
1035297741	Barry Bean	10358808	R* 1T - 1a-FF	1	October, 2013
1035297742	Barry Bean	10358808	R* 1T - 1a-FF	2	October, 2013

Look at the:

- Notes screen and click on the note titled "Reissue Formula" to see the automatic note.
- Check Issuance-View History-Checks to see how the reissued checks display.



**Remember:**

- **If a client brings back all checks and no formula cans, just use Void and Replace.**
- **To update the infant's Health History to show the formula change.**

## Skill Builder

### Reissue Formula Checks



1. **Pipi Papaya's mother, Poppy**, is returning with 2 cans of powdered Similac Advance and wants Similac for powdered Fussiness and Gas. She has cashed all the checks that were currently active. She brought all the checks for future months that she had been issued.  
Retrieve Pipi's record and:
  - a. Follow the steps in the module to reissue the 2 cans of formula. (If you are a clerk, you can do the required tailoring in the training environment, but not in your real clinic.)
  - b. Use Void and Replace Checks to replace the checks for future months that she was already issued. (Warning – do not void the current checks you just reissued.) Remember, after using Void & Replace, then open Check Pickup to issue/print the replacement checks.
  - c. Look at the Check Issuance-View History-Checks and Notes to see documentation of what you've done.
  - d. Be sure you know the location of your clinic's Returned Formula Log so you can record information about returned formula in real life.
  
2. Infant **Oscar Okra** needs his formula changed from powdered Similac Advance to Enfamil Prosobee due to a milk allergy. His mother has brought back 4 cans of Similac.
  - a. Follow the steps in the module to reissue the 4 cans of formula. (If you are a clerk, you can do the required tailoring in the training environment, but not in your real clinic.)
  - b. Use Void and Replace Checks to replace the checks for future months that he was already issued. (Warning – do not void the current checks you just reissued.) Remember, after using Void & Replace, then open Check Pickup to issue/print the replacement checks.
  - c. Look at the Check Issuance-View History-Checks and Notes to see documentation of what you've done.



(Did you remember to update the formula information on Health History?)

## Using Reissue Formula Checks to Increase Formula for a Breastfed Infant

When a caregiver asked to increase formula for a breastfed infant that is still breastfeeding or has stopped breastfeeding, there are several possibilities. See the table below. All of these situations would also involve assessment and education about the breastfeeding situation and updating the infant's Health History.

Past Checks	Situation	Action for New Checks
No checks have been issued.	Wants formula.	Simply issue new checks. (Tailor as needed.)
Checks issued.	Today's date is <b>after</b> the last day to use of the checks. Wants formula.	Cannot issue more formula for the previous issuance period. Simply issue checks for the new issuance period. (Tailor as needed.)
Checks for some formula (or no formula, but checks for cereal and baby food.)	Checks not redeemed. Caregiver returns all checks to clinic before Last Day to Use. Wants more formula.	Use Void and Replace with a change in food package. (Tailor as needed.)
Checks for some formula (or no formula, but checks for cereal and baby food.)	Some or all checks redeemed. Caregiver is in clinic before last day to use so is in the current issuance period. Wants more formula.	Use Reissue Formula Checks. (Tailor as needed.)

Breastfeeding Status as of the first date to use on the original checks determines the base food package. So you may find a situation when Reissue Formula Checks will not allow you to issue as much formula as you need because it is more than the maximum allowed for that Breastfeeding Status. If you need to add more formula than that amount, you can repeat Reissue Formula Checks until you reach the desired total. Be sure to keep track so you do not issue more than the maximum allowed for the new Breastfeeding Status.

We'll use Harold Honeydew as an example. Just look at the screen shots – **do not click along**.

Harold Honeydew is 2 months old. He was a Mostly Breastfeeding infant and has been issued a check for 4 cans of formula. Helen, his mother, is back in the clinic. He has used all that formula and is breastfeeding less. He now takes about 20 ounces a day.

Update Harold's Health Interview. Clicking on the View Formula Limits link tells you the 20 ounces per day means his Breastfeeding Status is now Limited Breastfeeding.

From policy [FCI 02.01.01 Infant Food Packages-Breastfeeding Infants](#) we know the allowed formula for this age of infant when Limited Breastfeeding is 5-9 cans of Similac Sensitive Fussiness and Gas.

Reviewing the Check Issuance-View History-Checks indicates today is within the use dates of the original check and the check was redeemed, as Helen said.

**Check History**

Check Records for **Harold Honeydew** Client ID: **10358711**

First Use	End Use	Check	Food Package	Seq	Source	Status
<b>Issued on 09/09/2013 by Darcy Thompson at Butler County WIC Clinic</b>						
09/09/2013	10/09/2013	1035295793	1T - 1b-Mostly BF - Mostly BF 1, 2 & 3	1	On Demand	Redeemed <a href="#">View Signature</a>

From View Checks, we see he was issued 4 cans.



The suggested formula amount at the bottom of Assign Food Package is 7 cans.

**Suggest 7 containers of Similac Sensitive Fussiness & Gas powder based on most recent daily intake.**

*What to do? Use Reissue Formula Checks and issue 3 cans more to a total of 7 cans.*

Reissue Formula Checks Harold Notices Harold

**Reissue Formula Checks** Select the formula Checks that the client is returning.

Check #	Issued	First Use	End Use	Food Package	Void & Replace
1035295793	9/9/2013	9/9/2013	10/9/2013	1T - 1b-Mostly BF - Mostly BF 1, 2 & 3 m Redeemed	Contains Formula

**Formula Returned** Enter the number of containers brought to the clinic by the client.

Formula	Qty	Notes
12.6 oz Similac Sensitive Fussiness & Gas pdr 70074 57541	<input type="text"/>	

**Replace Formula**

Assigned Food Package **1T - 1b-Mostly BF**

Select Formula to Reissue  Similac Sensitive Fussiness & Gas powder

[Assign Food Package](#)

Units Issued on selected checks

Total equivalent containers to reissue  of

Units returned by the client

Containers to reissue

- Formula Returned is 0.
- Notes – something like “Decreased breastfeeding”
- Click in the checkbox to reissue Similac Sensitive Fussiness and Gas.
- Containers to reissue is 3.

Reissue Formula Checks Harold Notices Harold

**Reissue Formula Checks** Select the formula Checks that the client is returning.

Check #	Issued	First Use	End Use	Food Package	Void & Replace
1035295793	9/9/2013	9/9/2013	10/9/2013	1T - 1b-Mostly BF - Mostly BF 1, 2 & 3 m Redeemed	Contains Formula

**Formula Returned** Enter the number of containers brought to the clinic by the client.

Formula	Qty	Notes
12.6 oz Similac Sensitive Fussiness & Gas pdr 70074 57541	<input type="text" value="0"/>	Decreased breastfeeding

**Replace Formula**

Assigned Food Package **1T - 1b-Mostly BF**

Select Formula to Reissue  Similac Sensitive Fussiness & Gas powder

[Assign Food Package](#)

Units Issued on selected checks

Total equivalent containers to reissue  of

Units returned by the client

Containers to reissue

(If there were future checks printed for 4 cans and the mother brought them to clinic, you would now use Void and Replace and issue new checks with 7 cans instead of 4 cans.)

## What if?

*What if Harold he had stopped breastfeeding?*

The maximum allowed for his age and formula is 9 cans. So you would issue a total of 5 more. But you cannot issue more than 4 at a time because the original checks were for a Mostly Breastfed infant.

The work-around is that you can use Reissue Formula Checks more than once to reach the maximum total. For example use Reissue Formula to issue a check with 4 cans. Then use it again to issue a check with 1 can.

## Caution

Be careful to track the maximum you should give. Reissue Formula Checks will not stop you from issuing too much. That would result in a major issue and the client or agency likely having to pay back benefits.

## 1 more thing...

With the situation in this section, the mother's food package also needs to be assessed and likely reduced. If she has future checks for too much food because she is now breastfeeding less, you will need to use Void and Replace to issue checks with the new food package. Refer to [FCI 02.03.02 Food Packages for Breastfeeding Women](#) and [FCI 02.03.03 Food Packages for Non-Breastfeeding Postpartum Women](#). If mom's food package will decrease and she does not bring back the existing checks, only issue one month of formula checks to baby until mom brings back her checks to be exchanged.

### Skill Builder

#### Reissue Formula Checks



Kaleo Franklin-Wilson III is an infant who was issued 6 cans of Similac Advance powder. Today his mother is in clinic. She used all that formula and has stopped breastfeeding as of about five days ago. Use Reissue Formula Checks to issue more formula, up to the maximum for his age and formula.

## Summary - Void & Replace Checks and Reissue Formula Checks

Policy and procedure reminders:

- Remember that the checks to be voided **must** be in the possession of the Local Agency before checks can be replaced. Similarly, if a client has cashed formula checks and has unopened cans, the cans must be returned before staff use Reissue Formula Checks. Exceptions may be allowed as already described.
- If a client brings in checks to be voided and replaced with a different food package just for personal preference, clinic staff may do so if staff are available. However the State Agency recognizes that clinic schedules may not allow for this practice. It is acceptable to ask the client to wait until their next appointment for new checks.
- If the client was issued checks with only food (no formula) and any of the checks are redeemed, staff cannot use Void and Replace until the next month.

The process of voiding checks to replace them can be daunting. It is extremely important that you understand when to Reissue Formula Checks and when to use Void and Replace Checks – and when **not** to.

Ask yourself some questions before you begin:

- What do I expect when I am finished with this process?
- Did the client/caregiver bring all of their WIC checks with them?
- Has the client/caregiver redeemed or cashed any of the current month's checks?
- Is this just infant formula that needs to be replaced?
- Is there a RN or RD available to create any new food packages?

*If you are uncertain, call the Help Desk before you get started.*

**1-866-516-3606**





## Skill Builder

### Scenarios – How Should I Proceed??

Here are some scenarios that have been presented to the Help Desk. Read each and decided how to proceed.

#### Scenario #1

---

After seeing her pediatrician, a client needs to get her checks replaced. The doctor has prescribed a different formula for the newborn, and mom presents you an authorization form signed by the doctor. She has all of her checks for this month with her and hands them to you. No other checks were issued to her by the WIC clinic on her last visit, a few days ago.

*(A RN or RD will need to approve the authorization and enter it into KWIC, as well as tailor the food package.)*

*How to proceed: Use Void and Replace Checks and select option #3. You want to void and replace their checks AND create a different food package as well. Be aware, that the first use date will change to today's date for this and all future issuance. Because the replacement issuance is now a "new" food package, a new 30 day issuance period is required for the checks.*

#### Scenario #2

---

A postpartum client returns to the clinic with some of her checks for the month, and asks to have some cheese instead of milk. Check history shows that 3 checks were issued and none are listed as "Redeemed" (but the client only brought in 2 checks). The client confirms that she had cashed one of the checks already. New checks are available to be printed for the client, but the first use date is not for another 2 weeks.

*How to proceed: The client cannot get any replacement checks for her current food package. If a client has cashed any of the checks for an issuance period, the food package cannot be changed (except for formula). The client must wait for the next month's issuance to have the preferred items in her food package. It is helpful if a clinic has a system for a clerk to record such requests and pass them along to the RN or RD to tailor the food package in KWIC prior to the client's next visit.*

#### Scenario #3

---

A breastfeeding mother tells you that she accidentally ran one of her WIC checks through the laundry and it was damaged. She has part of the damaged check and the two good checks with her and gives them to you. She is fine with the food package, just needs a new check.

*How to proceed: You may replace the damaged check. According to policy [FCI 04.06.00 Replacement for Damaged or Destroyed Checks](#), damaged WIC checks may be replaced if the caregiver returns at least a portion of the damaged check to the WIC clinic. Destroyed checks may be replaced if the caregiver provides sufficient supporting proof of destruction. "Supporting proof" of destruction is for things like a house fire, tornado, or car accident, not laundry.*

*Use Void and Replace Checks and select Option #2. This will allow you to void and replace a single check due to damage, loss or being stolen. **Be careful to select the correct check.** A new check will print with the same food items and first use dates. Be sure to give mom back the two original undamaged checks that she gave you.*

#### **Scenario #4**

---

Today is the 10<sup>th</sup> of the month and an active postpartum client has returned to the clinic with **all** her checks - the current active checks and all the future months that were issued to her. She requests some changes to her food package for personal food preferences. The checks were issued with a first use date of the 25<sup>th</sup> of last month.

*How to proceed: It is important to remember that the first use date of the replacement issuance will change to today's date. (A RN or RD must tailor the food package. **It is the clinic's option to accommodate the request before the next check pick-up.**)*

*Use Void and Replace Checks, Option #3 and void all (current and future months) checks. When you press the Void & Replace button, a popup window will open informing you that the checks will be voided and Assign Food Package will open. When Food Package Assignment opens, the system will tell you the first date to use has been changed. Create a new tailored food package for the client as you normally would do. Save the food package assignment to the current month's issuance. Open the Check Pickup window print the checks as you normally would.*

#### **Scenario #5**

---

A client has asked to replace a food item for her current month's issuance. You void and replace the checks with the change she requested, and then she tells you that she already cashed one of her checks.

*How to proceed: First **prevent** this from happening again by following the policy to not use Void and Replace until you have the checks in hand (unless you have permission from the State Agency.) Now – what to do? There is no way to "unvoid" the original checks once the Void & Replace process is complete. You must contact your KDHE Lead Staff Member and inform them of the error. You will need to void the new issuance using option #1 and destroy/shred the checks.*

#### **Scenario #6**

---

A caregiver gives you checks for her infant and asks for a different formula. She hasn't cashed any of the checks for this month's issuance.

*How to proceed: **Do not use Void & Replace.** You will need to use the Reissue Formula Checks screen. The first use date will not change using this feature, and you will be able to replace just the formula, not affecting any of the other checks previously printed. When you are finished using Reissue Formula Checks for the current month's issuance, use Void & Replace to change the food package for any future issuance the client has. (A RN or RD will need to tailor the food package.)*

### **Scenario #7**

---

A new caregiver comes in with a foster child – an active client on WIC. The new foster parent has some checks, but all have the previous caregiver's name on them. Also, she reports some of the client's current checks have been used, and she thinks there may have been other checks issued as well but the caseworker could not get them back from the previous caregiver. She needs new, replacement checks for the current month and any other future months of issuance replaced.

*How to proceed: First, do whatever is needed to change the caregiver and get the correct caregiver information on the Demographics tab. Usually either transfer the child to a new group or, if the child is alone in a group, change the caregiver. Make appropriate documentation in notes based on custody papers, etc.*

*Next, carefully assess the situation to determine what checks the new foster parent has with her and what other checks have been issued and redeemed according to KWIC. Your actions will depend on the situation.*

- A. *You determine the checks that the new caregiver was incorrect and the she gave to you are actually all the current and future checks, despite what she'd been told. All other checks issued were past their use dates so could not be replaced anyway. So you have all the checks eligible for replacement in hand. Be sure the correct caregiver information is entered on Demographics. Then select Void & Replace option #2 to void the checks you need to replace and issue replacements using the same food package. This will keep the first use date the same as the original set of checks and have the new caregiver name.*
- B. *You determine the new caregiver was right – checks that she brought in are only part of the future checks. There are also current checks issued, some of which are redeemed. Stop! Before proceeding to void and replace checks, you must contact the State Agency for guidance because you do not have possession of all the checks to be replaced. When you call the State Agency, the guidance will depend on details such as "When is the first use date of the next checks?", "What is the likelihood of getting the old checks back from the previous caregiver?" and "Are any of the checks redeemed?" If the State staff member gives approval, you need to document the approval in a KWIC note. Be sure the correct caregiver information is entered on Demographics. **If no checks have been redeemed**, select option #2 to void the checks you need to replace and issue replacements using the same food package. This will keep the first use date the same as the original set of checks. You can void and replace all of the checks, both current and future checks this way.*

***If a check for the current month has been redeemed and the food package is:***

- *For formula (usually an infant), you can make the change for the current month using reissue formula checks. Get state approval first because the checks were not returned.*
- *For only food (most children), there is no way to replace the current month of checks. Option #2 can be used to replace the future checks. Get state approval first because the checks were not returned.*

The End

