

## Section II: Local Agency Procedure Manual

### II. Local Nutrition Services

#### B. Adjustments and Tailoring of Food Packages

##### Purpose

Tailoring a participant's food package to meet nutritional, cultural or preference is determined by the Certified Professional Authority (CPA) after assessment and consult with the participant.

##### Policy

Tailored food packages are modified food packages designed to meet individual participant's nutrition needs.

---

#### 1. Tailored Food Packages

- A modified or "tailored" food package means:
  - A reduction in the standard food package size
    - the CPA, after consideration of the participant's individual request or needs, issues a food package with less than the full quantity of at least one food item.
  - Includes an item which requires CPA or RD determination based on an assessment or a prescription:
    - soy beverage or milk outside the default fat level
    - 1 can of infant formula for a substantially breastfeeding infant in the first month
    - reason for change of any infant formula
    - issuance of ready-to-feed/use infant formula when powdered and/or concentrate are available
    - issuance of formula to accommodate a religious preference (such as Kosher)
    - replacement of some infant fruits and vegetables with a fruit and vegetable cash value benefit
    - substitution of one food category item for another food category item due to homelessness
    - issuance of any item that is not considered "standard", such as swapping out cheese or yogurt for milk.
- Education will be provided to the participant/authorized representative concerning the recommended intake for the foods being reduced or substituted.
- Tailoring of a food package will be documented in the participant's folder.
  - This documentation will include whether the package was tailored based on the CPA's assessment, based on medical documentation, and/or at the request of the participant/guardian.

## 2. Milk and Milk Substitutes

### Milk Issuance:

- Fat level will be assigned in clinic based on category, age, and nutrition need.
  - Low-fat (1%) or nonfat (skim) milk, reduced fat (2%), and whole milk
    - Milk type and form will be chosen at the store for low-fat or nonfat and whole milk
      - Reduced fat (2%) milk requires selection of type and form in the clinic (prescribed)
    - Types include:
      1. Cow's Milk
      2. Lactose Free Milk
      3. Goat's Milk
    - Forms include:
      1. Fluid
      2. Can/Evaporated
      3. Dry/Powdered
- Children under age 2 years- exceptions to standard whole milk issuance:
  - Fat-reduced milks (2% or 1% and skim) may be issued at the CPA's discretion after a complete assessment for the following:
    - 114 Overweight or at Risk of Overweight
    - 115 High Weight for Length (but not when less than the 25<sup>th</sup> percentile weight-for-age)
    - Familial obesity
    - Trajectory of growth (after RD consult)
  - Assessment by the CPA of continued need will be conducted at certification and mid-certification visits.
- Children 2 years of age and older, and women- exceptions to standard low-fat/skim issuance:
  - Reduced fat (2%) milk may be issued after a complete assessment at the CPA's discretion for the following assigned Nutrition Risk Factors:
    - 101 Underweight Women
    - 103 Underweight or at risk of Underweight – Children
    - 131 Low Maternal Weight Gain
    - 132 Maternal Weight Loss During Pregnancy
    - 134 Failure-to-Thrive
    - 335 Multifetal Gestation
    - 338 Pregnant Woman Currently Breastfeeding
    - 342 Gastrointestinal Disorders

- 347 Cancer
  - 348 Central Nervous System Disorders
  - 349 Genetic and Congenital Disorders
  - 352a Infectious Diseases Acute
  - 352b Infectious Diseases Chronic
  - 359 Recent Major Surgery, Trauma, Burns
  - 360 Other Medical Conditions
  - 362 Developmental, Sensory or Motor Disabilities Interfering with the Ability to Eat
- Assessment by the CPA of continued need will be conducted at certification and mid-certification visits.

**Soy Beverage:**

- The CPA must assess and determine the approval of soy beverage for women and children. Acceptable reasons may include, but are not limited to, milk allergy, lactose intolerance, cultural practices, or the following of a vegan diet.
  - Documentation of reason must be made in the participant’s chart.
  - Education must be provided related to adequacy of dairy, or substitutes, in the diet.

**Other Milk Substitutes:**

	<b>Amount</b>	<b>Milk rate</b>
Cheese	1 pound	3 quarts
Yogurt	1 quart	1 quart (must be appropriate fat content for category)
Tofu	1 pound	1 quart
<b>Milk Substitution Max Amounts by Category</b>		
<b>Participant Category</b>	<b>Max</b>	<b>Notes</b>
Children (FP IV)	4 quarts	May include any combination of the options above (yogurt is limited to 1-quart max)
Pregnant Women (FP V)	6 quarts	May include any combination of the options above (yogurt is limited to 1-quart max and cheese is limited to 1-pound max)
Post-Partum Women (FP VI)	6 quarts	May include any combination of the options above (yogurt is limited to 1-quart max and cheese is limited to 1-pound max)

<b>Milk Substitution Conversion Rates</b>		
Partially/Substantially Breastfeeding Women (FP V and VI)	6 quarts	May include any combination of the options above (yogurt is limited to 1-quart max and cheese is limited to 1-pound max)
Fully Breastfeeding or Pregnant with Multiples (FP VII) Note: Other participants may be on FP VII	6 quarts	May include any combination of the options above (yogurt is limited to 1-quart max and cheese is limited to 2-pound max)  Note: The standard pound of cheese in FP VII is in <i>addition</i> to these substitution options.  <i>If 2-pounds of cheese is added in addition to the standard 1-pound, that is the 6-quart max substitution.</i>

### 3. Infant Formulas

- Contract Infant Formula
  - Montana WIC's current cost containment contract is with Abbott Nutrition for milk and soy-based formula.
    - Similac Advance will be issued as the standard contract milk-based infant formula. Similac Total Comfort, Similac Sensitive and Similac for Spit Up are alternate options in the milk-based formula rebate contract list.
    - Any of the standard milk-based options listed above are allowable with EBT at the point of sale.
  - Similac Soy Isomil will be issued as the standard contract soy-based infant formula
- Non-contract standard infant formula (i.e., not covered in the cost containment contract) may be issued to accommodate religious preferences or by documented healthcare provider request
- Formula issued in the standard food packages for infants is in the powdered form by default unless it is not manufactured in that form.
  - Concentrate formula may be issued at the request of the parent/guardian.
  - Issuance of Ready-To-Feed (RTF) formula is considered "tailoring" and requires documentation and ongoing assessment for need with each subsequent issuance.
  - Ready-to-Feed formula may be issued under the following circumstances:
    - There is an unsanitary or restricted water supply
    - There is poor refrigeration
    - The formula is available only in the ready-to-feed form
    - The person caring for the infant has difficulty in correctly preparing powdered or concentrate formula

- In the case of Food Package III, formulas may be issued as RTF if the physical form better accommodates the participant's condition, such as prematurity, an immune-compromised condition, or it improves compliance in using the prescribed formula.

#### 4. Returned Formula

- A participant/authorized representative may return any purchased and unopened formula from the current benefit cycle and exchange it for a benefit with another type of formula.
  - If a participant is changing between formula forms, staff will use the lowest maximum allowable reconstituted amount (i.e., powdered to concentrate).
    - Formula replaced may not be greater than the maximum allowed, including amount recovered and/or returned.
      - Less formula may be issued based on need.
      - Staff will consider pro-ration based off days left in the current month.
  - If returned formula is a medical formula or WIC-eligible nutritional that the State ordered (not available for redemption at the store), and the "change food item already issued" functionality cannot be used for the change, document the product and amount returned in the participant chart.
- Update formula in the Management Information System (MIS) SPIRIT
  - Verify calculation of the reconstituted value of the new type of formula so it does not exceed the maximum allowable for the participant's breastfeeding status and/or age category.
  - The MIS will calculate standard formula changes. For state issued medical formulas or to verify calculations, use the following information:
    - subtract the amount of reconstituted formula already used (if any) from the total reconstituted amount.
    - divide this number by the reconstituted amount of the replacement formula to determine the number of containers/cans to issue on the reissued benefits.
    - round container/can amounts down to the nearest whole number.
    - an example:

A two-month-old participant was issued 9 cans of the contract milk-based formula.

The participant has used 2 cans already therefore returning 7 cans to the clinic. The participant now has a prescription for Pregestimil.

The contract formula reconstitutes to 90 oz. per can, the participant has already used 180 oz. ( $2 \times 90=180$ ) out of the total allowable of 870 oz.

Subtract 180 oz. from the total 870 oz. resulting in 690 oz. remaining. ( $870 - 180 = 690$ ).

Pregestimil reconstitutes to 112 ounces.

Divide 690 oz. by 112 oz.

This gives you 6.12 cans of Pregestimil ( $690/112 = 6.12$ ).

Issue 6 cans of Pregestimil on reissued benefits.

- Formula returned to the clinic may not be donated or redistributed unless approved by the State Office under extenuating circumstances
  - Use the *Formula Tracking Log* to document formula received, destroyed, or issued via direct distribution (special order formulas).
  - Store returned formula out of sight of participants until it can be properly disposed of as follows
  - Open and pour out contents before throwing away containers.
  - If donation or redistribution has been allowed, document circumstances in participant record and add details to formula log.

## 5. Homeless Food Package

- Designed to meet the needs of those who are homeless or with limited food preparation and/or storage facilities. A participant's individual circumstances should be considered in prescribing the most appropriate food package.
- Infant Feeding
  - Breastfeeding of infants will be encouraged.
  - When formula is requested, powdered formula is issued.
    - ❖ Ready-to-feed formula may be issued if adequate safe water is not available, and documentation is made in the participant folder.
- Child and Adult Food Packages
  - Modify standard food packages as appropriate.
  - If proper refrigeration is not available:
    - ❖ Legume Choice may be substituted at a rate of one choice to one dozen eggs.  
*Call the state WIC help desk or a Nutritionist before substituting for eggs as there are extra steps that need to be taken within the computer system.*