

I-WIC: Transfers

There are a few different transfer scenarios that can occur for someone participating in WIC and each scenario has different steps that need to be taken in I-WIC to complete the process correctly.

In-State transfers occur:

- when a household needs to transfer from their current clinic to a different clinic either within the same agency or a to different agency.
- when a participant needs to transfer to a different Household due to custody or foster situations.

Out-of-State transfers occur:

- when a participant transfers into Illinois from another state.
- when a participant transfers out of Illinois

In-State Transfers:

HH -Clinics within the Same Agency	HH- To a Different Agency & Clinic	Individual Participant to Different HH
<ul style="list-style-type: none"> • Access the Search screen • Select Local Agency in the SCOPE section • Search for the household record you wish to transfer • Select the household record that needs to be reassigned • Access the Household Info screen • In the CLINIC dropdown field, select the new CLINIC you want to transfer the Household to • SAVE 	<ul style="list-style-type: none"> • Access the Search screen • Select STATE in the SCOPE section • Search for the household record you wish to transfer • Click on the row for that household and click the Select button • Click OK on the popup stating, "You can only work with Participants..." • Review the information on the Transferring Household popup • If correct, SAVE • A pop-up will display asking if you wish to cancel all appointments, select YES 	<ul style="list-style-type: none"> • Create* a new household to move the existing participant to, only complete the Precertification screen but <u>leave the Applicant Grid blank</u> • Under the Miscellaneous file menu, select the Change Household screen • Search for and select the participant you wish to transfer • Click the Change Household button • Review the information in the Transferring Participant popup • If correct, SAVE • A pop-up will display asking if you wish to cancel all appointments, select YES • The system will display a popup message reminding staff to complete the mandatory fields on the Household Info and Income Information screens, click OK • For a foster child, additional items to complete include updating Participant Info screen by checking Mother Not in HH, checking the Foster Care checkbox, adding the Foster Care risk factor, assigning an EBT card and issuing benefits.
<ul style="list-style-type: none"> * Appointments are not automatically canceled by the system * The EBT Card and any remaining benefits move with the Household 	<ul style="list-style-type: none"> * The EBT Card and any remaining benefits move with the Household 	<ul style="list-style-type: none"> * EBT card and any remaining benefits DO NOT move with the participant * System voids future benefits. Transferring clinic must contact current clinic to void current benefits if able to identify those that belong to transferring participant. Current benefits, if any remain, should not be reissued until this is complete.

*Moving an existing participant from one household to another typically involves a foster child. If the child is not a foster, SEARCH for the household and do not create a new household.

Out-of-State Transfers:

New Participant	Existing Participant
<ul style="list-style-type: none"> • Access the Search screen • Select STATE in the SCOPE section • Search for the participant to make sure applicant does not already exist • Access the Precertification screen, complete the screen as normal including, adding the participant(s) to the Applicant grid • SAVE • Click the Mark Onsite button • Select OST as the Service • SAVE and Close • Access the eWIC Card Account Maintenance screen and assign an EBT card • Access the Out of State Transfer screen through the Miscellaneous file menu and complete the required screens • Assign food packages and issue benefits • Scan the VOC into the system 	<ul style="list-style-type: none"> • Access the Search screen • Select STATE in the SCOPE section • Search for and open the existing participant record • Access the Out of State Transfer screen through the Miscellaneous file menu and complete the required screens • Access the eWIC Card Account Maintenance screen to verify active EBT card. If card is not active, assign a new card. • Assign food packages and issue benefits • Scan the VOC into the system
Providing a VOC	
<ul style="list-style-type: none"> • Search for and open the existing participant record • Access the Verification of Certification screen under the Miscellaneous file menu • Click Print • Access the Cert Action screen • Click in the Term Reason field and select Transferred Out-of-State • Click in the Term Date field and enter a termination date effective 15 days from today • SAVE • Access the Benefits Void screen and void all future month's benefits • Cancel any future appointments • It is not necessary to stop the EBT card 	