
POLICY: Remote Transfers

Staff are allowed to complete transfers without the participant or Parent Guardian being physically present due to concerns about COVID-19 exposure or when following the clinic's or agency's guidelines to minimize the spread of the Coronavirus. Transfers include:

- [Transfers within Washington WIC](#)
- [Transfer into Washington WIC](#)
- [Providing transfer information for participants who move out of state](#)

Staff can complete the contact by an agency landline phone, agency cell phone or secure interactive video chat. Check with your IT staff about what electronic methods meet the definition of a secure video chat.

Staff must use an interpreter for the contact when bi-lingual staff aren't available to interpret for a participant with Limited English Proficiency (LEP). Document the use of an interpreter service on the Family Demographics Sticky Note in the participant's file.

Note: See [Volume 1, Chapter 21 - Transfer/Verification of Certification](#), for more information.

PROCEDURE:

Staff:

A. Complete the following for **transfers within Washington WIC**:

1. Accept transferring Washington WIC participants with current eligibility.
2. Select the participant's proof of identity:
 - a) The participant's ProviderOne number was verified by the previous clinic staff on the **Income Information** screen.
 - b) Staff can see the participant's proof(s) during a secure video chat.
 - c) The participant emails or texts a picture of the proof(s).
 - Have the participant use secure or encrypted email and text methods to protect their privacy and security. Some texting apps have the option to encrypt messages.

- d) Staff select “Not Provided” when none of the above apply.
- This includes when the person can’t encrypt an email or text in order to send a picture of the proof(s).
 - Cascades doesn’t give the participant a 30-Day Temporary Certification period in this situation.
 - Create a Family Alert to remind staff to review and document the missing proof when physically present in the clinic.

3. Issue food benefits as appropriate.

Note: The transfer participant or Parent Guardian doesn’t have to sign a new Rights and Responsibilities form electronically. The signature captured at the previous clinic for the certification transfers with their file.

See the following resources and tools for more information:

- [Volume 1, Chapter 21 – Transfers](#)
- [Schedule an Appointment to Transfer Between Cascades Clinics](#)
- [Transfer a Family Between Cascades Clinics](#)
- [Transfer a Foster Child](#)

B. Complete the following for participants who **transfer Into Washington WIC from out of state:**

1. Accept transfer participants with current eligibility.
2. Obtain transfer information.
 - a) View the transfer information during a secure video chat when possible.
 - b) Obtain transfer information from the participant or the previous WIC clinic in another state.
 - The participant can mail the transfer information to the clinic, provide it via drive up services, etc.
 - Staff can contact the previous WIC clinic to request the transfer information. The previous clinic can provide the information by email, fax or phone.

3. Document appropriate information in the participant's file.
 - a) Participant category.
 - b) Demographic information, including name, date of birth, gender and address.
 - c) Enter due date if the participant is pregnant or delivery date if breastfeeding or non-breastfeeding postpartum.
 - d) Participant race and ethnicity information.
 - Let the person know WIC asks this information to find out who WIC serves and doesn't affect eligibility or immigration status.
 - Select the participant's declared race and ethnicity.
 - If the person can't, or doesn't want to, declare this information, staff must do their best and enter the information.
 - Staff will have to select Hispanic or Non-Hispanic for ethnicity and can then select all race categories.
 - Write an Alert to update this information when the participant is present in the clinic.
 - e) Dates eligibility begins and ends.
 - Use the dates from the transfer information.
 - If the participant transfers from another state which certifies the participant category for a shorter period of time than Washington, use the Washington WIC eligibility period.
 - f) Enter all nutrition risks and measurements from the transfer information.
 - Into state transfer participants will automatically be assigned the risk "Transfer of Certification", risk 502.
 - g) Write a Family Alert to obtain and scan the "hard copy" transfer documentation in the participants file when available.
4. Select the participant's proof of identity and residency based on the following:

- a) View the participant’s proof(s) during a secure video chat when possible.
 - b) The participant emails or texts a picture of the proof(s).
 - Have the participant use secure or encrypted email and text methods to protect their privacy and security. Some texting apps have the option to encrypt messages.
 - c) Staff select “Not Provided” when none of the above apply.
 - This includes when the person can’t encrypt an email or text in order to send a picture of the proof(s).
 - Cascades doesn’t give the participant a 30-Day Temporary Certification period in this situation.
 - Create a Family Alert to remind staff to review and document the missing proof when physically present in the clinic.
5. Complete the Rights and Responsibilities form.
- a) Ask the participant if they have access, by phone or on a computer, to read the [Rights and Responsibilities form](#) on the Washington WIC website, or read the entire form to the participant.
 - Direct the participant to the [Rights and Responsibilities form](#) in their language, read the form to the person in their language, or ask the interpreter or Language Line staff to read the form to the person in their language.
 - b) Once the participant has read, or had the Rights and Responsibilities form read to them, verbally review the required information on the form and ask if the person agrees.
 - See [Volume 1, Chapter 7 – Rights and Responsibilities](#) for more information about the required review.
 - c) If the participant agrees to the Rights and Responsibilities, click Capture Signature and write “Remote Transfer” in the Certification Signature box.
 - d) Write a Family Alert to have the participant sign a paper copy of the form when physically present and scan it into Cascades.

6. Provide and document referrals.
7. Issue a WIC Card – swipe the WIC Card or enter the number on the Issue EBT Card screen.
8. Prescribe and issue food benefits as appropriate.
 - a) Issue food benefits for the appropriate number of months (1, 2 or 3 months of issuance) based on required documentation and next appointment needs.
 - b) Staff sign for the food benefits and write “RBI” for remote benefit issuance.
 - See [Volume 1, Chapter 22 – Issue WIC Food Benefits](#), “Issuing Food Benefits without Physical Presence” for more information.
9. Offer WIC shopping education and information about how to use the WIC Card.
 - a) Ask if the participant can download and view the [WIC Shopping Guide](#) on the WIC website to see the foods while staff review them on the phone or during the video chat.
 - b) Encourage the participant to consider downloading the WIC Shopper App.
10. Offer the participant the option to mail the WIC Card or have the participant pick the card up at the clinic.
 - a) Let the participant know the card may take 5 – 7 days to arrive by mail.
 - b) If the participant prefers staff mail the card:
 - Confirm the address in the participant’s file is correct.
 - Provide the card along with the WIC ID and Card folder which lists required written referral information.
 - Offer a Shopping List, Shopping Guide, and other WIC Card materials as needed if the participant doesn’t access the WIC Shopper App.

- Follow the “Mail WIC Card” policy in [Volume 1, Chapter 22 – Issue WIC Food Benefits](#).

Note: Current recommendation is to wash your hands with soap and water before gathering materials to mail, use a moist sponge or other material to seal the envelope. Wash hands again.

11. Let the participant or Parent Guardian know when their next appointment is based on their needs and if any missing documentation is required.
12. Thank the participant for participating in WIC and offer a phone number for questions.

See the following resources and tools for more information:

- [Volume 1, Chapter 21 – Transfers](#)
- [Schedule an Appointment to Transfer Into the Cascades System](#)
- [Transfer a Family into the Cascades System](#)

C. Provide transfer information to all eligible participants who want to **transfer out of Washington WIC**, or provide transfer information to the WIC clinic where they transfer their WIC eligibility.

1. Print an Out of State Transfer Information document.
2. Review the document to assure it includes current participant information including benefit issuance.
3. Document additional information on the transfer document as appropriate. Examples include:
 - Farmers Market benefit issuance
 - Missing proof information
 - Information about loaned breast pumps
 - Participant date of birth, anthropometrics, hemoglobin and notes.
4. Confirm the participant’s address and send the transfer information to them, or send directly to the next clinic using the recommended practices listed above.

See the following resources and tools for more information:

- [Volume 1, Chapter 21 – Transfers](#)
- [Transfer Participants Out of the Cascades System](#)

Washington State WIC Nutrition Program
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