

CVB Change June-September 2021

General Information

The American Rescue Plan Act (ARPA) was passed by the US Congress in early March, and by the State of Montana (HB 632) at the end of April. The legislation in Montana pertained to all ARPA funds granted to the State for a variety of programs and reasons. All funding sources were required to be approved for use by the appropriate Commission appointed. On May 20th, the WIC funds allocated by USDA for the CVB increase were approved by the Health and Human Services Commission for issuance by WIC staff.

The Cash Value Benefit (CVB*) increase includes the following:

- Up to \$35 issued to each woman and child participating in WIC for a maximum of 4 months (June, July, August and September) for fresh, frozen or canned fruits and vegetables
- Up to \$35 issued for infants 9-11 months on Food Package III who have been assessed for issuance of FRESH fruits and vegetables via CVB. Please DO NOT check box for FPIII simply to allow this issuance, this increase was NOT authorized for infants who do not otherwise qualify for FPIII normally.

*there are two new food items set up in M-SPIRIT for this increase that is only active from June-September.

We have approval to begin issuance, the following includes a summary of steps needed to do this along with screenshots for reference:

- 1) Run the report in **Tableau** to identify who in your agency requires issuance of benefits from June on (as many months as they are eligible to receive)
 - The report can be located in: Data Sets/Covid-19 Data/CVB Increase Issuance Report (Summer 2021)
 - Adjust parameters as needed, we recommend:
 - Select your AGENCY (or clinic if you are dividing them up)
 - Select Terminated: N
 - Select Due Benefits: Y
 - WIC Category: ALL (may uncheck infants if you want to do FPIII infants 9-11 months last)
 - Last benefit end date: suggest 6/1/21 – 8/31/21 (in case some future benefits are issued and need to be updated)
 - Due Benefits: All (default recommended)
 - Need Food Prescription Update: ALL (default recommended)
 - To download and save or print the list, select “Download”, “Data”, “Download all rows as text file” or as “excel” if this is easier
 - Consider that each participant chart will likely require about 4 minutes to update. Once the report is reviewed, and local capacity to do the updates has been considered- please reach out to Kate Girard kgirard@mt.gov to request assistance with issuance by State Office staff
 - If you are unable to complete work on a participant, you can leave a General Note in the folder. Use the Subject of “CVB Increase” and the notes will appear in the Tableau

report. This will help when checking the Tableau report, so you can see that a participant was already worked with.

- If you have questions call WIC IT Help Desk or email WICHelp@mt.gov
- 2) When you are ready to update the chart for each participant:
 - Open file, go to benefit tab and verify NO JUNE BENEFITS ARE ISSUED
 - If there ARE June benefits and they have updated CVB, and correct months have been issued, close chart (this is complete)
 - If there ARE benefits, and they are for an INFANT who is 0-8 months with no CVB, close chart (this is complete)
 - If there ARE benefits, and they are for an INFANT who is 9-11 months with CVB option, but is NOT on Food Package III, close the chart (this is complete)
 - If there ARE benefits, and they are for an INFANT who is 9-11 months with CVB option and IS ON Food Package III, update with new CVB item (delete current CVB, and add in NEW, screenshots below)
 - If the chart is a CHILD or WOMAN and is for June and does NOT have new CVB, edit food package to delete CVB (normal value) and add NEW CVB for \$35
 - If there is NO June benefits, and the participant is eligible for issuance:
 - Add default food package, delete regular CVB, add NEW CVB \$35
 - Issue for eligible months (consider next appointment due, other factors)
 - If the system needs an item updated, address the issue
 - Example: date breastfeeding verified, validating level of breastfeeding, validating the formula (i.e. if baby is trying a new formula and you want to check on how it is going), or age break update of food package (1 to 2 year old)
 - These *may* require contact with the woman or authorized representative on the chart to validate and update information
 - Add NEW food package for October 1st with regular CVB. Note that the increased CVB for the summer has an END DATE OF September 30th and will be deactivated at the end of this period.
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Screenshot of Tableau Report Parameters:

Agency: (All) Terminated (All) No Yes

Clinic: (All) Due Benefits (All) No Yes

WIC Category: (All) New CVB Issued (All) No Yes

Cert End Date: 6/5/2021 to 5/31/2022 Need Food Prescription Update (All) No Yes

Last Benefit End Date: 4/30/2017 to 8/31/2021 Has Food Package III (All) No Yes

Next Appointment Date: 5/20/2021 to 9/14/2021

Issuance Screenshots

Create a new food package for **June 1**

Effective Date of Food Prescription: 03/25/2021

Quantity	UOM	Item

Milk Products [quarts]
 Maximum: 16
 Allocated: 0
 Remaining: 0

Substitute out Current CVB for New CVB (\$35)

Effective Date of Food Prescription: 06/01/2021

Quantity	UOM	Item
1	DOZ.	DOZEN LARGE A or AA WHITE EGGS
36	OZ.	OUNCES WIC APPROVED BREAKFAST CEREAL
32	OZ.	(eWIC Only) Whole Grain Choice
1	EACH	(eWIC Only) Legumes Choice
2	EACH	64 OZ PLASTIC BOTTLE(S) OR 16 OZ FROZEN WIC JUICE
16	QUART	(eWIC Only) 64 OZ PLASTIC BOTTLE(S) OR 16 OZ FROZEN WIC JUICE
900	EACH	FRUIT AND VEGETABLE BENEFIT

Milk Products [quarts]
 Maximum: 16
 Allocated: 16
 Remaining: 0

Are you sure you want to delete the selected Food Prescription item?

Add Food Prescription

Effective Date of Food Prescription: 06/01/2021

Quantity	UOM	Item
1	DOZ.	DOZEN LARGE A or AA WHITE EGGS
36	OZ.	OUNCES WIC APPROVED BREAKFAST CEREAL
32	OZ.	(eWIC Only) Whole Grain Choice
1	EACH	(eWIC Only) Legumes Choice
2	EACH	64 OZ PLASTIC BOTTLE(S) OR 16 OZ FROZEN WIC JUICE
16	QUART	(eWIC Only) Quart(s) Skim Milk / Low Fat (1%) Choice

Milk Products [quarts]
 Maximum: 16
 Allocated: 16
 Remaining: 0

Use Default
Add Food Item
 Edit Food Item
 Delete Food Item

Add Food Item

Food Category: [Dropdown]

- LEGUMES (BEANS/PEANUT BUTTER)
- EGGS
- CHEESE
- JUICE
- INFANT CEREAL
- CASH BENEFIT**
- WHOLE GRAINS

OK Cancel

Add Food Item

Food Category: CASH BENEFIT

- FRUIT AND VEGETABLE BENEFIT
- FRUIT AND VEGETABLE BENEFIT (6/1/2021)**

OK Cancel

Add Food Prescription

Effective Date of Food Prescription: 06/01/2021

Quantity	UOM	Item
1	DOZ.	DOZEN LARGE A or AA WHITE EGGS
36	OZ.	OUNCES WIC APPROVED BREAKFAST CEREAL
32	OZ.	(eWIC Only) Whole Grain Choice
1	EACH	(eWIC Only) Legumes Choice
2	EACH	64 OZ PLASTIC BOTTLE(S) OR 16 OZ FROZEN WIC JUICE
16	QUART	(eWIC Only) Quart(s) Skim Milk / Low Fat (1%) Choice
3500	EACH	FRUIT AND VEGETABLE BENEFIT (6/1/2021)

Milk Products [quarts]
 Maximum: 16
 Allocated: 16
 Remaining: 0

Use Default
 Add Food Item
 Edit Food Item
 Delete Food Item
 Show Details

Sample New Food Package

- Rx 06/01/2021
- 1 - DOZEN LARGE A or AA WHITE EGGS
 - 36 - OUNCES WIC APPROVED BREAKFAST CEREAL
 - 2 - 64 OZ PLASTIC BOTTLE(S) OR 16 OZ FROZEN WIC JUICE
 - 3500 - FRUIT AND VEGETABLE BENEFIT (6/1/2021)
 - 1 - (eWIC Only) Legumes Choice
 - 32 - (eWIC Only) Whole Grain Choice
 - 16 - (eWIC Only) Quart(s) Skim Milk / Low Fat (1%) Choice

Notes:

New CVB food item will expire September 30th.

Only void if there has been NO REDEMPTION for June.

If you have questions call WIC IT Help Desk or email WICHelp@mt.gov.

If you were unable to complete work on a participant, you can leave a General Note in the folder. Use the Subject of "CVB Increase" and the notes will appear in the Tableau report. This will help when checking the Tableau report, so you can see that a participant was already worked with.

How to Pull Tableau June Benefit Data

There is a report in Tableau designed to help with the process of issuing the new CVB food items. It is located:

Data Sets / Covid-19 Data / CVB Increase Issuance Report (Summer 2021)

You will have to adjust the search filters on the page.

Agency (All) ▼	Terminated <input checked="" type="radio"/> (All) <input type="radio"/> No <input type="radio"/> Yes
Clinic (All) ▼	Due Benefits <input checked="" type="radio"/> (All) <input type="radio"/> No <input type="radio"/> Yes
WIC Category (All) ▼	CVB Issued <input checked="" type="radio"/> (All) <input type="radio"/> No <input type="radio"/> Yes
Cert End Date 5/27/2021 5/31/2022 □—————□	Need Food Prescription Update <input checked="" type="radio"/> (All) <input type="radio"/> Yes
Last Benefit End Date 4/30/2017 8/31/2021 □—————□	Has Food Package III <input checked="" type="radio"/> (All) <input type="radio"/> No <input type="radio"/> Yes
Next Appointment Date 5/20/2021 9/14/2021 □—————□	

Report 1: See who needs benefits for June.

1. Set the Agency and Clinic filters to your Agency and Clinic.
2. Set "Due Benefits" to 'Yes'

Due Benefits

(All)

No

Yes

Report 2: See who already has June benefits issued and need to be changed to the new food items.

1. Set the Agency and Clinic filters to your Agency and Clinic.
2. Set Terminated to No
3. Set New CVB Issued to 'No'
4. Set the Last Benefit End Date range to 6/1/2021 and later

Agency	<input type="text" value="(All)"/>	Terminated	<input type="radio"/> (All)
			<input checked="" type="radio"/> No
			<input type="radio"/> Yes
Clinic	<input type="text" value="(All)"/>	Due Benefits	<input checked="" type="radio"/> (All)
			<input type="radio"/> No
			<input type="radio"/> Yes
WIC Category	<input type="text" value="(All)"/>		
Cert End Date	6/30/2021	5/31/2022	New CVB Issued
	<input type="text"/>	<input type="text"/>	<input type="radio"/> (All)
			<input checked="" type="radio"/> No
			<input type="radio"/> Yes
Last Benefit End Date	6/1/2021	8/31/2021	Need Food Prescription Update
	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> (All)
			<input type="radio"/> No
			<input type="radio"/> Yes
Next Appointment Date	5/24/2021	8/31/2021	Has Food Package III
	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> (All)
			<input type="radio"/> No
			<input type="radio"/> Yes

The results for Report 2 will show all participants in your agency/clinic who have been issued June benefits, but without the new CVB items. These participant benefits will need to be switched out PRIOR TO REDEMPTION, to the new food item outlined in the steps above.

“CVB Notes” (scroll all the way to the right of the report) is a new subject option in M-Spirit to help clinic staff track the status of that participant folder (i.e. requesting call back to verify information or new RX).