

Stock Formula and Nutritional Tracking**Policy No. NS- 210.13**

Effective date: October 1, 2016

No. of Pages: 3

Policy

The local agency Competent Professional Authority (CPA) must document, track, and monitor the receipt and issuance of all infant formulas and WIC-eligible nutritionals (nutritional) accepted into the clinic stock. The local agency can only accept into stock infant formulas and nutritionals that were originally purchased with WIC food dollars.

Purpose

To monitor and account for the use of program funds.

Procedures

- I. The CPA shall accept infant formulas and nutritionals into the clinic stock under the following circumstances:
 - A. Formulas and nutritionals being returned/exchanged for food package changes
 - B. Formulas and nutritionals purchased in error
 - C. Formulas and nutritionals issued by Georgia WIC being returned as donation back to the program
 - D. Formulas and nutritionals not authorized for issuance through Georgia WIC if purchased in error or issued by another state
- II. The CPA must use the [Formula Tracking Log](#) created by the State WIC Office.
 - A. Alternate and electronic formula tracking logs may be used with prior approval from the State Office.
 - B. Each entry must include the following:
 1. The date, participant name and/or WIC ID number, and the quantity of formula/nutritionals received, issued or destroyed
 2. The reason for receiving, issuing, or discarding formula or nutritionals
 3. The CPA signature and credentials verifying that they received, issued, or destroyed the indicated formula or nutritional
- III. CPA staff shall immediately dispose of expired and damaged formula by completely emptying the contents of the formula container prior to throwing it away. For example, concentrate or ready to feed formula should be poured into a sink before the formula carton is placed in the trash. Formula is considered damaged when:
 - A. The container appears swollen or has a bulged end or lid

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- B. The container shows visible evidence of leakage
- C. The container is crushed out of shape to the extent that they will not fit in a case, stack on a shelf or cannot be opened with a manual can opener
- D. The container is dented or has pinched tops or bottoms
- E. The container has rust spots

Note: Formulas and nutritionals which were damaged or expired at the time of purchase must be returned to the vendor to be exchanged. This vendor requirement is described in the "Important Notes about the WIC Customer for Cashiers and Store Managers", section of the [Georgia WIC Program Vendor Handbook](#).

- IV. CPA staff must conduct a physical inventory of all formula and nutritionals in stock at least quarterly.
 - A. Monthly physical inventories are recommended for busy or larger clinics with frequent shifts in available stock.
 - B. Documentation of the physical inventory is required on the tracking form. This includes a statement that the inventory was conducted, the date the inventory verification was completed and the signature of the person verifying the inventory.

Note: Maintaining a rolling balance does not qualify as inventory verification.

- V. The CPA must remove and discard (or transfer) formulas and nutritionals from clinic stock 30 days prior to the expiration date printed on the container. Circle "D" for destroyed on the formula tracking log and document the expiration information as the reason for discarding.
- VI. CPA staff should transfer excess stock and rarely requested special formulas and nutritionals, which will likely expire prior to issuance to eligible participants at clinics within the district or to other districts throughout the state.
 - A. Exempt infant formulas or nutritionals that cannot be issued within the district should be added to the [Formula Trading Database](#) by contacting the State WIC Office at 404-657-2900 for login information.
- VII. The local agency should refer individuals and programs wishing to donate formula and nutritionals not purchased with WIC funds to a local food bank or a program that provides resources to low income families.

Authority

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Georgia WIC Program Policy

Definitions/Supporting Information

Competent Professional Authority (CPA) – An individual on the local agency staff who is authorized to determine nutritional risk and prescribe supplemental foods. The following individuals may be authorized and trained to serve as a CPA: physicians, nutritionists (bachelor's or master's degree in Nutritional Sciences, Community Nutrition, Clinical Nutrition, Dietetics, Public Health Nutrition), registered dietitians, licensed dietitians, registered nurses, and physician assistants (certified by the National Committee on certification of Physicians Assistants or certified by the State medical certifying authority), or State or local medically trained health officials.

Exempt Infant Formula – An infant formula that is intended for commercial or charitable distribution that is represented and labeled for use by infants who have inborn errors of metabolism or low birth weight, or who otherwise have unusual medical or dietary problems (21 CFR 107.3).

Formula – A food indicated for special dietary use solely as a food for infants because of its simulation of human milk or its suitability as a complete or partial substitute for human milk.

Nutritional – Enteral products that are specifically formulated to provide nutritional support for individuals with a diagnosed medical condition when the use of conventional foods is precluded, restricted, or inappropriate.