

Introduction

Intro

This HuBERT on-demand training module ...

Intro1

... is provided by the MN Department of Health WIC Program. It provides an overview of syncing and cycle-adjusting when issuing benefits.

Syncing/Partial Packages

Scenario

Mama Vine was here a couple of days ago for a nutrition education visit. At that time she was issued late May benefits for her and her son, Beau. She had just had her baby on the 7th but didn't have time to stay for an appointment when she was here on June 10th so we scheduled an appointment for both her and her baby for today, June 12.

We had prescreened Ivey when Mama was here on the 10th.

Mama is due to be recertified this month as postpartum and we will certify Ivey at the same time.

Double-click to open Mama's folder and then start her cert.

<no audio – failure hint> Double-click on Mama Vine's row to open her Participant Folder.

Start Cert

<no audio – failure hint> Click the **Certification** icon.

Benefits Available Msg

Remember, the system auto-suggests the benefit set for the month a cert ends. Since Mama hasn't been issued June benefits yet, this message displays: Valid benefits are still available for this participant through Issue Benefits. Would you like to abort the certification process?

If we clicked Yes, it would exit the cert process we just started so that we could go into Issue Benefits to issue the last set.

We will issue her June benefits after we've recertified her so we will click No and continue with starting her cert.

Go ahead and click the appropriate button.

<no audio – failure hint> Click the **No** button to continue with the cert.

Link Certs Msg

Mama is breastfeeding as well as supplementing with formula. Complete this dialogue.

<no audio – failure hint> Click the **Breastfeeding** radio button.

<no audio – failure hint> Click the **Yes** button. She was on WIC during her pregnancy.

<no audio – failure hint> Click OK or press the Enter key.

CGS

We are also going to open Ivey's Cert Guided Script...

CGS 1

...and complete both of them.

CGS Done

We completed Mama's cert first. What are we going to click to end her guided script?

<no audio – failure hint> Click the **End Cert** icon to complete Mama's Guided Script.

CGS Done 1

Yep. Go ahead and complete the rest of the cert process.

<no audio – failure hint> Click OK or press the Enter key.

<no audio – failure hint> Click the **Schedule Appointment** checkbox to remove the checkmark.

<no audio – failure hint> Click the **Generate Certification Notice** checkbox to remove the checkmark.

<no audio – failure hint> Click OK or press the Enter key.

<no audio – failure hint> Click the **Capture Electronic Signature** button.

<no audio – failure hint> Click the **Save Signature** button.

<no audio – failure hint> Click the **Capture Electronic Signature** button.

<no audio – failure hint> Click the **Save Signature** button.

Select Another Mbr

<no audio> Click OK or press the Enter key to return to Ivey's Guided Script..

CGS Done 2

What are we going to click to end Ivey's guided script?

<no audio – failure hint> Click the **Issue Benefits** icon to complete Ivey's Guided Script.

CSG Done 3

Yep. Go ahead and complete the CGS end messages.

<no audio – failure hint> Click OK or press the Enter key.

CSG Done 3A

<no audio – failure hint> Click the **Schedule Appointment** checkbox to remove the checkmark.

<no audio – failure hint> Click the **Generate Certification Notice** checkbox to remove the checkmark.

<no audio – failure hint> Click OK or press the Enter key.

Syncing Pack

Federal Regulations require all participants being certified for the first time receive a set of benefits that begin on the date they are certified.

If there are other members in the household with an existing benefit cycle, as is the case with Ivey, HuBERT will suggest a syncing food package that has a Printed First Date to Use of today, June 12th, and an LDTU matching the household cycle, that bridges the gap between her cert date and the first date of the household cycle.

Since she is an infant, her syncing, or partial, pack is prorated to three-fourths because there are still 13 days left before her next set begins. And we'll leave this as suggested.

Syncing Pack 1

When HuBERT suggests a syncing, or partial, pack it will always suggest a full package as well beginning on the established PFDTU for that household in that month.

And both of these benefit sets should always be issued together.

<Transition Slide>

One Month

For instance, if we were pending proof of income, ID or residency, MN Policy states that only **one month of food benefits may be issued.**

Since both the partial and full package have a PFDTU in June, both sets are issued for the one month, June, and we would always issue both the partial and full sets.

So, what do we have to do on this screen to issue the correct benefits to Max for June? Go ahead.

One Month 1

Right. We must make sure that both the partial and full set are selected.

<Transition Slide>

System Determined

The syncing pack is considered a system-determined cycle-adjustment.

<Transition Slide>

Cycle Adjustment

These also occur for new participants, or households, that don't have an established cycle to sync to. Their cycle begins on their cert date and ends the day before that same date the following month.

So, for example, if they were certified on the 15th, their cycle's PFDTU would be the 15th every month and their LDTU would be the 14th each month.

However, there are two exceptions.

January Cert

The cycles of those certified between the 29th and 31st of January are shifted to adjust for the short month of February. Their first set issued has a PFDTU of the date they were certified but the LDTU is shifted to the 27th and their recurring monthly cycle then begins with a PFDTU on the 28th of each month.

Other Month Certs

And since the 29th through the 30th doesn't occur every month, if certified on those dates on any other month than January, they receive a syncing pack with a PFDTU on their Cert Start Date and the LDTU on

the last date of that month and then their cycle is shifted so that their PFDTU is the first of each month and their LDTU is the last date of each month.

<Transition Slide>

Cycle Adjustment 1

For existing participants being recertified who don't have other household members with a cycle to sync to, the system tries to maintain the established cycle.

However, if there is a gap of more than 37 days between when their last cert ended and their new cert begins, HuBERT will re-start their issuance cycle beginning on their Cert Start Date.

<Transition Slide>

Issue Benefits

Let's continue with issuing benefits to the Vine family.

The extra checkboxes underneath each of Ivey's benefit sets is for Direct-shipping formula, which we'll review in the Direct Ship modules.

Since Beau Vine's cert ends on July 31st, July is the last set of benefits he is eligible to receive and HuBERT is syncing the rest of the household's issuance to his.

<no audio> Click below the scroll bar.

Best Practice

<no audio> Click above the scroll bar.

As we mentioned before, best practice is to not issue the last set suggested, which has a PFDTU in the same month as the Cert End Date, and to recertify during the month the cert ends.

In some instances, though, it may be appropriate to issue the last set to keep the family on its tri-monthly schedule or to not overburden the household with monthly visits.

With that in mind, let's issue the benefit sets HuBERT has suggested. Go ahead.

<no audio – failure hint> Click the **Issue Benefits to Selected Members** button.

Aggregated

This time, there are multiple months listed in the Aggregated Issuance for EBT Account screen.

Although the partial pack for Ivey displays May, we know that because the PFDTU is a date in June, this is actually a June food package. Ivey is not eligible for May benefits since she was not born, or on WIC, in May.

Quantities of zero indicate that household member is not receiving that particular food item.

We can use the scroll bar to view the rest of the household's food items.

<no audio> Click below the scroll bar to view the rest of the June food items.

<no audio> Click below the scroll bar again to view the rest of the June food items.

Since we just certified and assigned food packages to Mama and Ivey, we've already ensured these are the correct food items and quantities.

For Beau, even though we just issued benefits a couple of days ago, we should still make sure that Mama is OK with the same food package, especially since this is our last chance to make changes before issuing to the WIC Card.

It seems we're good to go. Go ahead and issue to the card.

<no audio – failure hint> Click the **Send EBT Data** button.

Sending Issuance

<cursor spins>

Print Shopping List

Once again, let's take a look at the shopping list, displaying it on the screen.

<no audio – failure hint> Click the **Print Shopping List** button.

Print Shopping List 1

<no audio – failure hint> Click OK or press the Enter key.

Close Aggregated

Go ahead and close out of the Aggregated screen and finish Ivey's cert before we look at the Shopping List.

<no audio – hint after 7 seconds> Click the X in the top right corner or click the **Close** button.

End CGS

<no audio – failure hint> Click the **Save Signature** button.

<no audio – failure hint> Click the **Save Signature** button.

<Transition Slide>

Shopping List

This shopping list is slightly different.

First it lists the food benefits issued today.

<no audio> Click when ready to continue.

Shopping List 1

Next it lists the existing household food benefits, which were those we issued on June 10th to Beau and Mama.

Then the household totals with all benefits combined and listed.

Remember, this is a snapshot of their issuance and will not reflect their actual account balance if they've purchased any items that were already issued to their WIC Card.

<no audio> Click when ready to continue.

Shopping List 2

<no audio> Click when ready to continue.

Cycle Adjust – Select New LDTU

Cycle Adjust – Select New LDTU

In most instances, we will issue benefits based on the cycle that HuBERT suggests.

However, there are occasions when it may be appropriate to adjust an established cycle. For instance, if we need to sync a participant's cycle with clinic availability, such as may occur if a participant transfers to a WIC clinic that has limited days during the month that its open, or if a participant needs to change their nutrition education visit to weeks or days when later hours are available.

Transition Slide

Scenario 1

Today is June 17th and Sienna Brown is here for a mid-certification appointment. Her mom has just informed us coming to WIC before 4:00 in the afternoon is impossible with her job and is wondering if we are ever open later in the day.

Our clinic does have a late day every first Wednesday of the month. Go ahead and open Sienna's folder...

<hint after 7 seconds> Double-click the row in the Participant List or click the Open Participant Folder icon.

Start MCA

...and start the Mid-certification Assessment.

<no audio – failure hint> Click the **Mid-certification Assessment** icon.

Start MCA 1

<no audio – failure hint> Click Yes or press the Enter key.

MCA GS

And we'll quickly complete the MCA requirements, and verify the food package since we'll be issuing benefits. Go ahead and end the MCA guided script.

<no audio – failure hint> Click the **End Mid-certification Assessment** icon.

End MCA

<no audio – failure hint> Click Yes or press the Enter key.

Open Issue Benefits

Now let's issue benefits using the icon.

<no audio – failure hint> Click the **Issue Benefits** icon.

Cycle

In order for her cycle to sync up with the first week in a month, we will need to adjust the Last Date to Use of her cycle.

Cycle 1

Currently Sienna's cycle is the 17th to the 16th, which is around the third week of each month.

Cycle 2

Since our late day is the first Wednesday of each month, we need to change the LDTU of her first set of benefits to a date in the first week. Let's change it to July 3rd.

Change Cycle

To do this, in the *Cycle Adjustment Type* section, we click the **Selected LDTU of** radio button.

<no audio> Click the **Selected LDTU of** radio button.

New Cycle

HuBERT auto-suggests the earliest possible cycle adjustment, which in this instance results in a one-day package that begins and ends on the first set's PFDTU.

The drop-down calendar then becomes enabled so that we can select a new LDTU.

Calendar

<Fade – move screen up to view calendar>

<no audio> Click the **Selected LDTU of** calendar.

The dates that we can select are all the dates between today and the next set's LDTU. If our Last Set's LDTU was June 16th, as shown in the Household Member Information grid then our next set's LDTU is July 16th.

So, for the month of June we can select any date between June 17th and June 30th.

And if we click the right arrow to view the July calendar...

<no audio> Click the right arrow to view July.

Calendar 1

...any dates between July 1st and the 16th.

Again, we are going to select July 3rd as the LDTU to change Sienna's cycle to a first week cycle.

<no audio> Select July 3rd.

Week 1 Cycle

The cycle adjustment we made changes the cycle of her first set to a PFDTU of today and an LDTU of our selected date, July 3.

HuBERT suggests a prorated food package because there are only 17 days between today and the start of her next set of benefits.

And her new cycle, as evidenced by her July and August sets, is the 4th to the 3rd of each month.

Go ahead and finish issuing benefits to Sienna. This time, don't print the Shopping List.

<no audio – failure hint> Click the **Issue Benefits to Selected Members** button.

Send EBT Data

<no audio – failure hint> Click the **Send EBT Data** button.

Sending Issuance

<no audio – failure hint> Click the **Send EBT Data** button.

Close Aggregated 1

<no audio – failure hint> This screen does not automatically close. Click the **X** in the top right corner or click **Close** (or press the Enter key).

End Cycle Adjust

<returns to Participant Folder>

Scenario 2

Let's take a look at another scenario.

Since we book a lot of our new participants at the end of the month, our caseload is getting too heavy in the 4th week. Our Clinic Coordinator has tasked us with moving all households with a 4th week cycle that we see today, except those with infants, to the 2nd week, which has a much lighter caseload.

Scenario 2A

Skip Rope's mom has come to WIC for a Nutrition Visit.

His cycle is the 28th to the 27th, which is a 4th week cycle, and his last set of benefits were for April.

Since today is June 24th, we can still issue late for May.

Scenario 2B

It's just Skip who's currently certified in the household so we are going to ask mom if it is OK if we change when they come in for nutrition visits and/or appointments to earlier in the month, around the second week.

She's OK with the change in their cycle so let's open Skip's participant folder.

<hint after 7 seconds> Double-click the row in the Participant List or click the Open Participant Folder icon.

Open Health Info

Let's take a look at his Health Information first.

<no audio – failure hint> Click the **Health Information** tab.

Health Info Tab

He is currently marked as breastfeeding beyond one year and mom has indicated they are still breastfeeding at night.

Using the drop-down calendar, go ahead and complete this screen and open the Food Prescription tab.

<no audio – failure hint> Click the **Date Breastfeeding Verified drop-down calendar**.

<no audio – failure hint> Click the **Today** button.

<no audio – failure hint> Click the **Food Prescription** tab.

Save Health Info

<no audio – failure hint> Click **Yes** or press the Enter key.

Food Rx Tab

Which food package will be issued today? Click the plus next to it.

<no audio – failure hint> Click the **plus** next to 3/12/19.

Mom said the food package is good as is so next let's issue benefits. Click the icon.

<no audio – failure hint> Click the **Issue Benefits** icon.

Issue Benefits 1

So, we want to change Skip's cycle to the second week. Let's see what our options are.

<no audio> Click the **Selected LDTU of** radio button.

Remember, HuBERT auto-suggests the earliest possible cycle adjustment, which in this case is a one-day package that begins and ends today.

Selected LDTU of

<no audio> Click the **Selected LDTU of** calendar drop-down.

Notice there are only 4 dates available to change our LDTU to, and none of them is in the 2nd week.

Remember, the dates we can select are between today's date and the NEXT Last Date to Use, which is June 27th so we are limited to June 24th through the 27th.

In this scenario, It's not essential that we change the LDTU but what if we did absolutely have to make the change? Let's take a look at how we can do that.

We need to go back to the System Determined cycle.

<no audio> Click the **System Determined** radio button.

System Determined

<screen description> Cursor spins.

System Determined 1

What we need is for Skip to have an LDTU that is further into the future.

We can do this by issuing the late benefits for May.

Then our next set's LDTU will be 7/27.

So, how do we issue only May benefits with one click? Go ahead.

<no audio – failure hint> Click the **checkbox next to the June set** of benefits.

Go ahead and issue.

<no audio – failure hint> Click the **Issue Benefits for Selected Members** button.

Aggregated 1

<no audio – failure hint> Click the **Send EBT Data** button.

And exit this screen using the Close button.

<no audio – failure hint> Click the **Close** button.

Open Issue Benefits Again

To issue our June and July benefits, we need to go back into the Issue Benefits screen. Go ahead.

<no audio – failure hint> Click the **Issue Benefits** icon.

Issue Benefits 2

We need to note: The system disables the manual cycle-adjustment if there are benefits for the household with a PFDTU in the future.

Issue Benefits 2A

Since we just issued the May benefit set and the PFDTU of that set is in the past, we are able to cycle-adjust.

Click to change the cycle.

<no audio – failure hint> Click the **Selected LDTU of** radio button.

The first viable LDTU is the 30th. Let's click the calendar drop-down again.

<no audio> Click the **Selected LDTU of** drop-down calendar.

This time, the month forward arrow button is enabled. Go ahead and click it.

<no audio> Click the month **forward arrow button**.

Now our options include the 30th through the 27th and we can select a second week LDTU. Let's select the 10th.

<no audio> Select July 10th.

<no audio> Cursor spins.

New Cycle 1

The first set for June is a partial pack that begins the day after his May benefits ended and have our newly selected LDTU of the 10th.

A half pack is suggested because he has only 13 days to use them.

Since we issue tri-monthly, we just want to issue May, June and July benefits today. Do what needs to be done and then issue the benefits.

<no audio – failure hint> Click the **checkbox next to the August set of benefits** to de-select them.

<no audio – failure hint> Click the **Issue Benefits to Selected Members** button.

Send EBT Data

<no audio – failure hint> Click the **Send EBT Data** button.

<no audio> Cursor spins.

<no audio> Status: Issuance Received. Success!

What if mom If mom wanted us to print the shopping list for her, would we do it from this screen?

Click Yes or No.

Send EBT Data 1

The answer is No.

We wouldn't print the Shopping List from this screen.

Not Shopping List

because it would only have the most recent issuance, which was June and July, and not list the May benefits.

So, what would we do? Do you remember? Go ahead...

<no audio – failure hint> This screen does not automatically close. Click the Close button or X in top right corner to exit this screen.

Account Balance

<no audio – failure hint> Click the **Benefit Management** menu.

<no audio – failure hint> Select **Print Account Balance**.

Report Destination

<no audio – failure hint> Click the **Send to Printer** radio button.

<no audio – failure hint> Click **OK** or press the Enter key.

Account Balance

Yep, we print the Account Balance, which lists the household's aggregated totals for all benefit sets...

Account Balance 1

that were issued.

Any time we change a household's cycle we'll want to make sure we emphasize the change in the cycle dates and how it impacts their food benefits.

<no audio – on screen> Since we changed Skip's cycle to the middle of the month, the first date and last date to buy foods has changed.

<no audio> Click when ready to continue.

Inform Ppt 1

<no audio – on screen> The first set is actually for May and since we issued so late into June, there is only one gallon of milk and they expire in three days, on June 27.

<no audio> Click when ready to continue.

Inform Ppt 2

<no audio – on screen> You have less time to use the next set, which are your June benefits because of the cycle change. It starts on June 28th and then ends on July 10th, which will be your new last date you can use your benefits each month.

<no audio> Click when ready to continue.

Inform Ppt 3

<no audio – on screen> Because you have less time to use your June benefits, the amount of milk is only one gallon.

<no audio> Click when ready to continue.

Inform Ppt 4

<no audio – on screen> Starting on July 11th, you have a full food package with 3 gallons of milk. You can use these until August 10th.

<no audio – on screen> And we'll see skip on Thursday, August 8th at 10:30 for his next appointment.

<no audio> Click when ready to continue.

App

Keep in mind that had mom had a smart phone we could have easily pointed out this information in the app.

End

Thank you for reviewing this HuBERT on-demand training module presented by the MN Department of Health WIC Program.