

## Introduction

### Intro

This HuBERT on-demand training module ...

### Intro1

... is provided by the MN Department of Health WIC Program. It provides an overview of benefits history.

## Benefits History

### Open Ben Hx

Let's take a look at Benefits History in Eve Ning's participant folder.

<no audio> Click the **Benefits History** tab.

### Benefits Hx

Benefits History provides a snapshot of a participant's issuance.

The root node, or the top node that displays for each issuance, shows the PFDTU and LDTU.

Similar to the Issue Benefits screen, if late issuance the PFDTU is in carrots and the FDTU and LDTU are listed after, as well as the proration amount.

It also displays the participant's WIC Type when the benefits were issued and the IDs of the Agency and Clinic where they were issued.

If we click on the root node to highlight it...

<no audio> Click on the root node.

### Shopping List

The Reprint Shopping List section at the bottom of the screen becomes enabled.

It gives us the option of Household or Participant Only.

Let's print for the household first...

<no audio> Click the **Print** button.

## Print

...and just display it on the screen.

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

## HH List

This reprints everything that was issued at the same time the highlighted set of benefits was issued. In this case, the July set was issued along with August and benefits were issued to both Ma and Eve.

## Print PPT

This time, let's print the list for the participant only...

<no audio> Click the **Participant Only** radio button.

<no audio> Click the **Print** button.

## Print 1

...and display to the screen again.

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

## PPT List

Same list except only Eve's issuance displays.

## FI Node

Let's expand the root node by clicking the plus next to the August benefit set.

<no audio> Click the + next to the August benefit set.

This is the serial number associated with issuance to the WIC Card.

If we click on the serial number...

<no audio> Click the serial number.

...the Show Details button becomes enabled.

<no audio> Click the **Show Details** button.

## Show Details

The Benefit Details screen provides some information relevant only to the issuance of paper benefits, which we'll look at in a minute.

But it also provides some information not found anywhere else, such as the certification period the issuance was associated with, the issued date, the participation month, which we know should correlate with the month and year of the PFDTU, and the person who issued the benefits.

And if the benefits were voided, we can see who voided them.

Go ahead and close this screen.

<no audio> Click the **Close** button.

## Filter Criteria

And let's take a look at some voided benefits.

We can easily search voided benefits by using the Filter Criteria.

Let's click the Status drop-down.

<no audio> Click the **Status** drop-down.

## Filter Criteria 1

We can filter by whether benefits are voided or not.

We want to look at voided benefits.

<no audio> Select **Voided**.

We can also narrow our search based on a date range.

The To Date is the last LDTU issued and if we look at the first set issued...

<no audio> Click below the scroll bar.

## Filter Criteria 2

...we can see that the From date is the very first PFDTU.

<no audio> Click above the scroll bar.

## Filter Criteria 3

And we can narrow the search within that range.

Let's check for any voided benefits between October 1<sup>st</sup>, 2018 and the last LDTU and start our Search by clicking the Search button.

<no audio> Double-click inside the **From** date field.

<no audio> Type **10/1/18** into the field and click the **Search** button.

## Voided

So between 10/1/18 and 9/23/19, there were three sets of voided benefits.

Go ahead and expand each root node.

<no audio> Click the + next to 12/24/2018.

<no audio> Click the + next to 11/24/2018.

<no audio> Click the + next to 10/24/2018.

VOIDED and the date the benefit set was voided displays next to the benefit number.

We should note that 3 serial numbers for a single issuance usually indicates paper benefits, which were no longer issued by MN WIC after September 2019.

## Voided Staff

What if we wanted to see who voided the October benefit #33875261? What would we do? Go ahead.

<no audio – failure hint> Click on **33875261** to highlight it and enable the **Show Details** button.

<no audio – failure hint> Click the **Show Details** button

## Voided Staff 1

Yep. Show Details.

It also displays a reason. However, this is no longer collected when voiding eWIC benefits.

Let's close this screen.

<no audio> Click **Close** or press the Enter key.

## Filter Criteria 4

What if we want to view all the non-voided benefits during the same time period? Go ahead.

<no audio – failure hint> Click the **Status** drop-down.

<no audio – failure hint> Select **Not Voided**.

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

## Not Voided

One more look at Show Details.

Let's look at the first benefit listed under September 24, 2018.

<no audio> Click the plus next to 9/24/2018.

<no audio> Click on benefit #32849422.

## Show Details 1

We used to collect the participant's signature when issuing paper benefits.

We were also able to view the redeemed benefits by clicking the Display Image button.

<no audio> Click the **Display Image** button.

## Image

<no audio> Click the X to close the image.

## Paid Info

The paid information, date and amount, is correct for paper benefits because everything on the benefit had to be redeemed at once.

With eWIC, redemption can occur on multiple dates for multiple amounts and this screen cannot reflect that.

Go ahead and close this screen again.

<no audio> Click **Close** or press the Enter key.

## Reset

We can clear our filters by clicking the **Reset** button. Let's do that.

<no audio> Click the **Reset** button.

## Reset 1

Notice that it reset the status and date filters but kept all of our expanded nodes opened.

There is one more node level. Click the plus next to the benefit being displayed at the top.

<no audio> Click the + next to benefit #35300683.

## Food Node

The issued food items and their quantities are listed in this node.

We will look at the Benefits History tab in other modules as it pertains to our issuances.

## View EBT Transaction History

### Open Trans Hx

Today is August 11.

Let's start by clicking on the Benefits Management menu.

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

We are going to view the EBT Transaction History for the Bear household.

<no audio – failure hint> Select **View EBT Transaction History**.

### Transaction Hx

The EBT Transaction History screen provides us with both issuance and redemption information for the household.

### WIC Processor

Every time benefits are added to a WIC Card, the information is stored in HuBERT and shared with the WIC Processor, where it is also stored.

### WIC Processor 1

However, redemption information is primarily stored at the WIC Processor and is communicated to HuBERT...

### Transition Slide

... to display in the EBT Transaction History screen.

### Dates

There are a couple of different filters to narrow our search for transactions.

The time period for our search, where the **End Date** defaults to the current date, is limited to one month or less.

Let's start by selecting June 30<sup>th</sup> for our start date.

<no audio> Click the **Start Date** drop-down.

<no audio> Select **June 30**.

## Dates 1

Notice that the End Date automatically changed to a month later.

Now let's select July 11<sup>th</sup> for our end date.

<no audio> Click the **End Date** drop-down.

<no audio> Select **July 11**.

So, if we select a date where the time period is less than one month, the other date is maintained.

## Type

The **Transaction Type** defaults to Both but we can limit it to either Benefit Activity, which is issuances and voids, or Redemption Activity, also known as WIC Card purchases.

For now let's view both types of activities. Let's click the Search button to view our filtered records.

<no audio> Click the **Search** button.

## History Grid

The Transaction History grid, provides the date and time a transaction occurred.

The type includes card activity such as when benefits are issued as seen here as "Benefit Add", purchases, voids, expirations, etc. and the printed first date to use to the last date to use of the associated benefit set.

We can see more transaction information by selecting a row, which enables the **View Details** button. Let's take a look at the first row.

<no audio> Select the first row.

## View Details

<no audio> Click the **View Details** button.

## View Details - Issuance

In the top section of the Transaction History Details screen it repeats the date, time and type.

It also displays the participant to whom the benefits were issued and the staff person who issued them.

The food items issued, and their quantities, display in the grid. Go ahead and close this screen.

<no audio> Click the **Close** button.

## Benefit Add

There are a large number of Benefit Add records because it displays each set of benefits issued to all the household members during our specified time period.

Let's see if there are any redemption records by searching for just that type of transaction.

What do you think you have to do? Go ahead.

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

## Redemption

Since we've already performed our search, the current records are filtered further by selecting the radio button.

And there are three Purchase Completion records.

We can also view details by simply double-clicking the row. Let's do that.

<no audio> Double-click the top row to open View Details.

## Redemption 1

<second click>

## View Details – Redemption

We can see that a purchase was made for yogurt, **eggs**, cereal, cheese, milk and some fruits and vegetables, and the amount that was redeemed.

"UPC Not Found" displays if the description associated with the UPC isn't available from the WIC Processor.

## Who Redeemed?

So, how does the WIC Processor determine which member redeemed the food items since the foods are aggregated for the household? Easy enough if it's something like formula and there is only one infant in the household. But, when items are purchased like milk and eggs and there are multiple members who received them, how does the WIC Processor decide who redeemed them?



## Unique Benefit ID

When benefits are issued, the processor assigns a unique benefit ID to that set of food items. When benefits are redeemed, it will sometimes redeem from the same benefit ID until there aren't any of those food items left and then it move to the next ID.

And sometimes, it will split the redemptions between two different members.

## Who Redeemed 1

We aren't sure how the WIC Processor decides which member is assigned which Unique Benefit ID, or how it decides who to assign the redemption to, but in this case, it appears that the first food items to be redeemed belonged to Teddy.

<no audio> Click the **Close** button.

## Transaction Hx4

Due to this redemption randomness, whenever we review the transaction history, we can never make any assumptions about who redeemed what and should always look at all applicable transaction records.

Go ahead and finish reviewing the transactions for the Bear household, starting with the middle row and double-clicking to open the details screen.

<no audio – failure hint> Double-click the middle row.

## Transaction Hx4A

<second click>

## Transaction Hx4B

<screen hint> Click the Close button.

## Transaction Hx4C

<no audio – failure hint> Double-click the bottom row.

## Transaction Hx4D

<screen hint> Click the Close button.

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

## Transaction Hx4E

Go ahead and close the Bear household's transaction history.

## Return to PF

<no audio> Teddy Bear's Participant Folder.

## Targeted Recovery

We have two more things to look at. First go ahead and open Mack's Transaction History screen.

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

<no audio – failure hint> Select **View EBT Transaction History**.

## Targeted Recovery 1

The default filters are fine. Go ahead and start the search.

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

## Targeted Recovery 2

Targeted Recovery indicates voided benefits and we can see August, September and October were all voided.

Go ahead and click the Targeted Recovery row for the October benefits and then view details.

<no audio> Click the first **Targeted Recovery** row (October benefits).

## Targeted Recovery 2A

<no audio> Click the **View Details** button.

## Targeted Recovery2

In the Details screen, we can see the October benefits were voided on August 5<sup>th</sup> and the staff person who voided them.

## Targeted Recovery3

<Transition slide needed>

This is the same information we can see in the Benefit Details screen in the Benefits History tab.

## Benefit Expiration

The last transaction type we may commonly see is the Benefit Grant Expiration.

<no audio> Click the **View Details** button.

### **Benefit Expiration1**

This is a system transaction occurring 8 days after the participant's Last Date to Use if the benefit set has food items that weren't purchased.

The grid displays the food items and quantities that were left unpurchased.

## **End**

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