Remove Issued Cheese

Intro

This HuBERT on-demand training module…

Intro1

…is provided by the MN Department of Health WIC Program. It provides an overview of how to remove cheese if already issued.

Cheese

This time we are going to take a look at how to remove cheese if issued to the WIC Card and the household no longer wants it because we handle cheese a little differently.

Cheese Scenario

Today is October 30th.

Mom is calling the clinic because she sent her mother to get Callen Dar's WIC this month and her mother forgot to tell us that they didn't want any cheese. So, now mom is wondering if we can remove it and provide more milk instead.

Cheese Scenario 1

We can see that Callen was issued benefits for October, November and December and his cycle is the 16th to the 15th.

His cert ends in January and he has an appointment scheduled that month.

Go ahead and open Callen's folder.

Redemptions?

We know that any redemption of the current month's benefits will affect what we can do.

<no audio> Click when ready to continue.

Open Trans Hx

Where do we go to assess redemption activity? Go ahead.

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

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

Cheese Trans Hx

Callen's cycle started on October 16th. Go ahead and use the calendar drop-down and check for any Redemption Activity.

<no audio – failure hint> Click the **Start Date** drop-down arrow.

<no audio – failure hint> Click the forward arrow.

<no audio – failure hint> Select **October 16th**.

Redemption Activity

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

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

Cheese Redemption

OK. There is a redemption record and since Callen is the only active participant in his household, we know it belongs to him.

The redemption means we can't do anything about the cheese issued for the current month. Let's take a look at why not.

Go ahead and click the Close button.

Cheese Open FAW

And open the Food Adjustment Wizard.

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

<no audio – failure hint> Select **Food Adjustment Wizard.**

In General

Generally, when we change an issued food item we can use the Food Adjustment Wizard to change a food already issued for all three months…

In General 1

…and as part of the process, foods issued to the WIC Card are automatically replaced and voided as appropriate.

<no audio> Click when ready to continue.

Dangling Qt

However, cheese is different from other foods., we can't rely on the Food Adjustment Wizard to do everything for us.

Remember, when we remove cheese from the food package, which is equal to 3 quarts of milk, we are left with a dangling quart.

No Cheese Food Rx

When a food prescription without cheese is created in the Food Prescription tab, the system alternates the quantity of milk each month by ½ gallon. This way, participants never receive ¾ of a gallon, or the dangling quart.

Remove Cheese in FAW

So what happens if we were to remove the cheese issued to the WIC Card using the Change a Food Already Issued function in the Food Adjustment Wizard.

Remove Cheese in FAW

Let's take a quick look at Ollie Baba and find out.

Food Category

We'll select our Food Category of MILK/CHEESE…

Change Food Issued

…and in the Change Food Issued screen, we can see that Ollie has 3 sets of benefits with cheese, milk and yogurt currently on his WIC Card.

Update Cheese Amounts

We'll update the Amount to Change for each month of cheese; (pause for animation)

Replacement Food

Select our replacement food item, which is the milk Ollie was issued; and Send our EBT Data.

Change Food Success

<no audio> Cursor clicks OK on "Food was changed successfully" message.

Food Rx No Cheese

The system has created the correct food package with effective dates of the PFDTU of the already issued sets but if we look at the Account Balance…

Dangling Qt on Balance

<need transition>

…we can see where the issue occurs.

Instead of alternating half-gallon quantities every month for the milk, it is providing the dangling quart.

Shopping Guide

And, according to the MN WIC Shopping Guide, the purchase of quarts is not allowed. So, we've issued some food benefits they can't purchase.

Shopping Guide 1

So, we will need to let our participant know that since they've already bought some of their foods for this month, we can't remove the cheese for **this month** but we can for future months.

FAW Void Future

So, back to Callen Dar.

If there weren't any redemptions or changes already made to the food package, we know that we could void current and future benefits.

But, since there have been redemptions, and we now know we can't use Change a Food Already Issued to remove cheese, what do you think we are going to do in the Food Adjustment Wizard?

Go ahead.

<no audio – failure hint> Click the **Void Future Benefits** radio button.

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

Void Future Benefits

Right. We're going to void the future benefits, create a new food package, and reissue the benefits.

Notice that the November set of benefits has whole milk.

Go ahead and click the checkboxes to void the November benefits and then December benefits.

<no audio – failure hint> Click the **Selected** checkbox for the November set of benefits.

<no audio – failure hint> Click the **Selected** checkbox for the December set of benefits.

Void Future 1

Now notice that the December set of benefits has Fat Free/Skim Milk or 1% Milk on them.

We know this change in milk occurs when a child turns two years old. So, we'll need to remember this when we create the new food package.

Go ahead and finish voiding.

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

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

Verify Void

Although we don't have to, let's just verify the benefits were voided.

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

Verify Void 1

<no audio> Click the **plus** next to the December set of benefits.

<no audio> Click the **plus** next to the November set of benefits.

OK. Good to go. Next, we need to create a food prescription without cheese in it.

<no audio> Click the **Food Prescription** tab.

Adjust FP

Callen is just shy of two years old and the November 18 food package begins on his second birth date.

<pause for screen slide>

His cycle is the 16th to the 15th so we need to create a food package without cheese for his November set.

And we need to edit the food package that begins on the 18th since this will be issued for his December set of benefits.

We can make changes in any order. So, let's start with adding the new food package with an Effective Date of November 16th. Go ahead.

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

Add New FP

<"Use the calendar drop-down." displays.>

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

<no audio – failure hint> Click the right arrow.

<no audio – failure hint> Select **November 16.**

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

<cursor spins>

<no audio – failure hint> Generally, we should delete food items before adding or editing. Click on **Cheese** to highlight the row.

<no audio – failure hint> Click the **Delete Food Item** button.

<no audio – failure hint> Click the **Yes** button (on the "Are you sure?" message).

<no audio – failure hint> We need to adjust the amount of milk. Click on **Whole Milk** to highlight the row.

<no audio – failure hint> Click the **Edit Food Item** button.

<"Use the spin arrows." displays>

<no audio – failure hint> Click the up spin arrow.

<no audio – failure hint> Click the up spin arrow.

<no audio – failure hint> Click the up spin arrow.

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

Verify Alternating

Well done.

Let's verify that milk is alternating as expected. How do you do that? Go ahead.

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

Yep. Our milk distribution will alternate each month.

Go ahead and close this panel.

<no audio> Click the X to close this panel.

And save our new food prescription.

<no audio – failure hint> Click OK to save the new food prescription.

Edit Existing FP

Let's just verify our new food package is good to go. Click the plus next to the 11/16 food package.

<no audio> Click the + next to the 11/16 food package.

OK. Next step is to update the 2 year food package that will be issued on the December benefits. Go ahead.

<no audio – failure hint> Click on **11/18/19** to highlight the Effective Date and enable the Edit button.

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

Edit Existing

<no audio – failure hint> Generally, we should delete food items before adding or editing. Click on **Cheese** to highlight the row.

<no audio – failure hint> Click the **Delete Food Item** button.

<no audio – failure hint> Click the **Yes** button (on the "Are you sure?" message).

<no audio – failure hint> We need to adjust the amount of milk. Click on **Fat Free/Skim or 1% Milk** to highlight the row.

<no audio – failure hint> Click the **Edit Food Item** button.

<"Use the spin arrows." displays>

<no audio – failure hint> Click the up spin arrow.

<no audio – failure hint> Click the up spin arrow.

<no audio – failure hint> Click the up spin arrow.

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

Since we created the food package in the Food Prescription tab we can be confident that the milk will alternate quantities as appropriate so go ahead and save the edited food package.

<no audio – failure hint> Click the **OK** button to save the edited food package.

Open Health Info

Since we are going to be issuing benefits, best practice is to always check Health Info. We know Callen isn't receiving FPIII but he could still be breastfeeding.

<no audio> Click the **Health Information** tab.

Health Info

Nope. We are good to go. Last step is to reissue the November and December benefits. Go ahead.

Edited FP

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

Issue Benefits

Callen is due for a recert in January and, as indicated on the Show Details panel on the Participant Search screen, has an appointment scheduled for January 16th.

With that in mind, issue Callen's benefits and then print the account balance.

Issue Benefits 1

<no audio – failure hint> Since Callen will be recertified in January, we will only reissue benefits for November and December at this time. Click the checkbox next to the January benefit set to remove the checkmark.

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

Aggregated Screen

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

<no audio – failure hint after 5 seconds> This screen does not automatically close. Click the Close button or the X in the top right corner of the screen.

Print Account Balance

<no audio – failure hint> Click the **Benefit Management** menu to print the Account Balance.

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

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

Account Balance

<no audio - displays on screen> Remainder of current October benefits after redemption and still with cheese.

<no audio - displays on screen> Reissued November and December benefits without cheese and with alternating quantities of age-appropriate milk.

<no audio> Click when ready to continue.

Removing Cheese & Changing Milk

New Scenario 2

We are going to take a look at a slightly different scenario this time.

Today is August 27th.

Mom has stopped by the WIC clinic because her daughter, Etta, doesn't like cheese so she was wondering if there was something else they could get instead.

Different this time is that she was also hoping we could change the rest of the milk to lactose-free, even though they've already bought some milk for this month.

Scenario 2

Etta was issued benefits for August, September and October and her PFDTU is the 19th.

She is due for a Midcert in November.

Go ahead and open her folder.

<no audio – hint after 5 seconds> Double-click on Etta's row in the Participant List or click the Open Participant Folder icon.

PPT Folder

Let's take a look at her current food package.

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

Food Rx Tab

Go ahead and open the node for her current food package.

<no audio – failure hint> Click the plus next to 05/14/2019.

Food Pkg

Currently she's getting whole milk, cheese and yogurt.

Next step, although mom told us she's purchased some milk, is to verify whether redemptions have occurred just to make sure the purchases were for the current month, which is August.

Go ahead and open the Transaction History screen.

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

View Trans Hx

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

<cursor rotates>

Start Date

Etta's PFDTU is the 19th. Select her PFDTU from the drop-down calendar and search for redemption activity.

<no audio – failure hint> Click the **Start Date** drop-down arrow.

Start Date 1

<no audio – failure hint> Click the forward arrow.

<no audio – failure hint> Select **August 19th**.

Redemption

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

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

Purchases

Since Etta is the only person issued benefits in her household we don't have to look at the details. We can see that she has redemptions for August and know that they belong to her.

Click close to exit this screen.

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

What to Do?

OK. So we know we can't void **current** and future benefits because there are redemptions for this month. We also can't remove cheese using the Food Adjustment Wizard because of the dangling quart.

So, how do we handle the change in milk?

What We Can Do

<no audio – displays on screen> We can't remove the cheese for this month because you've already bought some foods...

<no audio – displays on screen> ...but we can exchange it for some more milk for September and October...

<no audio – displays on screen>...and we can also change Etta's milk for all three months.

<no audio – displays on screen> That's great. Thank you!

<no audio> Click when ready to continue.

Well, first things first. We know we need to void the future so go ahead and do that.

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

Open FAW 1

<no audio – failure hint> Select **Food Adjustment Wizard.**

Void Future Benefits 1

<no audio> Click the **Void Future Benefits** radio button.

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

Void Sept and Oct

<no audio> Click the checkbox for the September benefit set.

<no audio> Click the checkbox for the October benefit set.

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

Void 2

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

Open BM

We still have Etta's benefits for August that need Lactose-free milk. Where do we change a food that's been issued to the WIC Card? Go ahead.

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

<no audio – failure hint> Select **Food Adjustment Wizard.**

FAW 1

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

Food Category

What are we replacing? Keep going…

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

<no audio – failure hint> Select MILK/CHEESE.

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

Amt to Change

Remember, we can't do anything about the cheese for this month.

Etta was issued 3 gallons of whole milk and it appears she has bought 2 since she only has 1 gallon left that we can change for this month. Go ahead and type the amount of milk we want to change into the cell and press the Enter key when done.

<no audio – failure hint > Click inside the cell to highlight it.

Amt to Change 1

<no audio – failure hint > Click inside the cell again.

Amt to Change 2

<no audio – failure hint > Double-click the 0.00 in the cell to highlight it.

Amt to Change 3

<no audio – failure hint > The quantity is 1. The Total Units Available for August for Milk. Type 1 then press the Enter key when done.

Change Food1

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

<rotating cursor>

New Milk

Etta has whole milk in her current food package. So we need to replace it with Whole Lactose-free milk. Go ahead and finish changing her milk for this month.

<no audio – failure hint> Click the **Replacement Food** drop-down arrow.

<no audio – failure hint > Click below the scroll bar.

<no audio – failure hint > Select **gallon(s) Whole Lactose Free milk**.

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

New Data Sent

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

New Food Rxs

Notice that a food package for today, August 27th, has been created. Go ahead and expand the node.

<no audio> Click the plus next to 08/27/2019.

Wrong Food Rx

This food package shows the whole milk that was issued and redeemed along with the lactose-free milk we just changed the remaining gallon to.

It also still has cheese in it.

In this instance, this is not a food package that we would want to issue since it hasn't been tailored to her new request, which is all lactose-free milk and no cheese.

Notice also that the 2-year food package isn't correct either so before doing anything else, let's go ahead and delete it.

Delete

<no audio – failure hint> Click on **4/15/2020** to highlight and enable the Delete button.

Delete 1

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

Delete 1

<no audio – failure hint> Click **Yes** (on the "Are you sure?" message)

Add New FP

Now before we can replace her September and October benefits, we need to create an appropriate food package.

As a general rule, we are going to create a food package that starts on the next PFDTU, which is September 19th. Go ahead and do this.

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

Add Date

<no audio – displays on screen> Type the Effective Date into the field.

<no audio – failure hint> Type **9/19/19** into the Effective Date of Food Prescription field and click the **Use Default** button.

Create New FP

<cursor spins>

<no audio – failure hint> Generally, we should delete food items before adding or editing. Click on **Cheese** to highlight the row.

<no audio – failure hint> Click the **Delete Food Item** button.

<no audio – failure hint> Click the **Yes** button (on the "Are you sure?" message).

<no audio – failure hint> In general we delete first. We should delete the Whole Milk before adding Lactose Free. Click on **Whole Milk** to highlight the row.

<no audio – failure hint> Click the **Delete Food Item** button.

<no audio – failure hint> Click the **Yes** button (on the "Are you sure?" message).

<no audio – failure hint> Click the **Add Food Item** button.

Add Food Item

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

<no audio – failure hint> Select **MILK**.

<no audio – failure hint> Select **Whole Lactose Free Milk.**

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

Edit Milk Quantity

<no audio – failure hint> We want to keep the yogurt in the food package so there is one too many quarts of milk product. Click on **Whole Lactose Free Milk** to highlight the row.

<no audio – failure hint> Click the **Edit Food Item** button.

<no audio – failure hint> Click the **down spin arrow.**

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

Save New FP

<no audio – failure hint> Click OK to save the new food package.

Open Health Info 1

Once again, before our last step of issuing benefits, we should verify the Health Information. Go ahead.

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

Health Info 1

Since Etta is still breastfeeding, we need to update the Date Breastfeeding Verified in order to be able to issue.

Go ahead and do that, using the drop-down calendar, then issue benefits.

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

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

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

Save Health Info

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

Open Issue – Wait

<cursor spins>

Issue Scenario 2

If we remember back to the Participant Search panel, Etta is due for a Midcert Assessment in November (and mom will call the clinic in November to make that appointment) so we are just going to reissue September and October benefits.

Go ahead.

<no audio – failure hint> Click the **checkbox** next to the November set to remove the checkmark.

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

Aggregated Scenario 2

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

Since some of the foods have been redeemed, we'll want to print the account balance and/or have her ascertain the updated food package in the WIC App.

Go ahead and print the Account Balance.

<no audio – hint after 5 seconds> This screen does not automatically close. Click the **Close** button or the X to exit.

Print Account Balance 2

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

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

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

Account Balance 2

<displays on screen> Cheese and 1 gallon Lactose-Free Milk for August; No cheeses and 4 gallons Lactose-Free Milk for September; No cheese and 3.5 gallons Lactose-Free milk for October.

<no audio> Click when ready to continue.

<no audio – displays on screen> Your account balance is also in the app.

<no audio> Click when ready to continue.

End

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