

## Issuing Formula: Change from Fully BF

### Intro

This HuBERT on-demand training module...

### Intro1

...is provided by the MN Department of Health WIC Program. It provides an overview of issuing formula when the breastfeeding status changes from Fully-breastfeeding and the infant is 6 months or older.

## FBF Infants 6 Months & Older No Redemptions or Adjustments (Mom & Baby)

### FBFI GTE 6 Mo

Fully breastfed infants 6 months and older have food benefits issued to the WIC Card.

For both mom and baby, individually, we need to assess whether redemptions have occurred, or adjustments have been made, to the current set of benefits.

If none have been made, which could be for mom, baby or both, we can void current and future benefits for whomever does not have redemptions or adjustments.

If redemptions or adjustments have occurred for one, the other or both, we must use the Food Adjustment Wizard to adjust the current set and void only the future sets for whomever **does** have redemptions or adjustments.

## Redemptions or Adjustments (Mom & Baby)

### Scenario

So, let's take a look at what to do if a fully-breastfeeding mom and infant have been issued benefits and then mom decides that she needs some formula.

### Scenario 1

Today is November 19<sup>th</sup>.

Momma Mell and her baby, Carl, were just certified last month when they were issued food benefits for October, November and December.

Their cycle is the 7<sup>th</sup> to the 6<sup>th</sup>.

Click on Carl's row to view his Show Details.

<no audio> Click on Carl's row to highlight it and view his Show Details panel.

## Infant Details

We can see that Carl has also been issued benefits.

Let's open his folder and check the Transaction History for redemption. Go ahead.

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

## Open PF

<cursor spins>

## Open Trans Hx

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

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

## Trans Hx Start Dt

<no audio – display> Their cycle is the 7<sup>th</sup> to the 6<sup>th</sup>.

<no audio> Type the first date of their November cycle into the **Start Date** field then select the **Transaction Type**.

## Trans Hx Search

Continue...

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

<cursor spins>

## Trans Hx Results

We know that they have redemption records. But now the question is, are there redemptions for both mom and baby or for just one of them?

Let's start at the top of the grid.

<no audio> Double-click the first purchase completion record.

### First Record

OK. This one is for Momma. Click the close button.

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

### Open Second Record

Let's check the next one.

<no audio> Double-click the second purchase completion record.

### Second Record

And this one is for Carl. So both have redemption records.

Click the Close button.

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

### Close Trans Hx

We have what we came for. We don't have to look any further. Click the Close button.

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

### Open Health Info

Since they are here to receive some formula, which means they will be Mostly-BF instead of Fully.

What's our next step? Go ahead.

<no audio – failure hint> We need to change Carl's Breastfeeding Amount from Fully BF to Mostly-BF. Click the **Health Information** tab.

### Change BF Amount

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

### Select MBF

<no audio – failure hint> Select **Mostly-Breastfeeding**.

### Verify Date

<displays above Date Breastfeeding Verified> Use the drop-down calendar

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

## BF Verified

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

## Update Supp Began

According to mom, they started formula a week ago Monday. Go ahead and type 11/11/19 into the Date Supplemental Feeding Began then click the Food Prescription tab to save our changes.

<no audio> Type 11/11/19 into the **Date Supplemental Feeding Began** field and click the **Food Prescription** tab.

## Save Health Info

<cursor spins>

## Save HI Msg

Continue clicking appropriately through the messages.

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

<no audio – failure hint> Click **Yes** to change the food prescription.

## Select Formula

<cursor spins>

Similac Advance powder is what mom is using. Continue...

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

<cursor spins>

## New DFP Msg

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

## New Infant FPs

We'll just quickly expand the food packages...

Since Carl already has food items issued to the WIC Card, we use the Food Adjustment Wizard to make our changes to his food package.

Go ahead and open it.

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

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

## FAW

Let's think about this for a sec.

All we want to do for Carl is Add More Formula. Nothing else on the card is changing.

So what is our next step?

<no audio> Click the **Add More Formula** radio button.

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

## Add Formula

The Add Formula screen allows us to indicate the number of cans we want to add to the current benefit set.

Similar to the other screens we've already seen, it has the Benefit Period it will affect, which is only the current set for November, the type of formula we selected (powdered Similac Advance), the number of cans already on the card, which is none, and the maximum number of cans we can add to the card.

### Add Formula 1

Notice that this is 3 instead of the max of 4, which is this formula's typical max amount for mostly-breastfeeding infants 6-11 months old.

## Proration

Usually, this screen prorates based on the initial issuance, which means <lightbulb> if the initial issuance was prorated, the Cans Available to Issue would match the original proration.

### Proration 1

However, since no formula was previously issued, the system is prorating based on the participant's next PFDTU and the current date. Since there are only 18 days left in this benefit cycle, the system has auto-suggested a max of 3, which is a three-quarters package. We cannot edit this max.

## Max Cans

Carl's mom indicated she would like the max number of cans she can receive for Mostly-BF.

## Additional Cans

As the directions indicate, we are going to select the Additional Cans cell to edit the number of cans we want to issue.

<no audio> Click inside the **Additional Cans** cell.

<no audio> Click inside the cell again.

## Additional Cans 1

Let's use the spin arrows to increase to 3 cans.

<no audio> Click the up spin arrow.

<no audio> Click the up spin arrow again.

And communicate and save our change.

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

<cursor spins>

## Direct Ship

The **Direct Shipped Benefit Items** screen automatically opens.

Notice that the formula isn't displaying correctly. This is simply a display issued and doesn't affect the actual formula being issued.

We aren't going to Direct Ship this formula, so we can just click the **Finish** button.

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

## Add Formula 2

And click OK.

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

## Infant Food Rx

<cursor spins>

Let's take a look at the food prescriptions. We'll just quickly expand the nodes...

HuBERT has adjusted the food prescription for today to reflect the 3 cans we issued to the WIC Card using the Food Adjustment Wizard.

But, we still need to reissue benefits for December and we could also add January benefits today.

Since mom wants the full amount of 4 cans we need to add a food prescription that begins on their December PFDTU, which is December 7<sup>th</sup>, as well as edit the 12/23 food prescription that will print on Carl's January benefits.

## Add Infant FP

Go ahead and add the 12/7 food package.

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

<no audio – display only> Use the drop-down calendar.

<no audio – failure hint> Click the **Effective Date of Food Prescription** drop-down calendar.

<no audio – display only> Select **December 7**.

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

<no audio – failure hint> Click on the **Similac Advance (12.4 oz pwd)** row to highlight it.

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

### **Edit Quantity**

<no audio – display> Type the maximum quantity allowed for a Mostly-BF 7 month old infant, then click OK.

<no audio – failure hint> The maximum quantity for a Mostly-BF 7 month-old infant is 4 cans.

### **Add Infant FP 1**

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

### **Edit January FP**

Next step is to edit the food package that will be issued on Carl's January benefits. Go ahead.

<no audio – failure hint> Click on **12/23/2019** to highlight it and enable the Edit button.

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

<no audio – failure hint> Click on the **Similac Advance (12.4 oz pwd)** row to highlight it.

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

### **Edit Quantity 1**

<no audio – display> Type the maximum quantity allowed for a Mostly-BF 8 month old infant, then click OK.

<no audio – failure hint> The maximum quantity for a Mostly-BF 8 month-old infant is 4 cans.

### **Save January FP**

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

Since mom also had redemptions for this month, we are going to leave her current benefits as-is and simply void her future benefits for December, verify her food package and re-issue.

### **Close Infant PF**

Go ahead and close Carl's participant folder and open mom's.

<no audio - hint after 5 seconds> Click the **X** in the top right corner or the **Close Participant Folder** icon.

### **Open Momma's PF**

<no audio> Double-click on Momma's row to open her Participant Folder.

<cursor spins>

### **Mom PF**

Remember what we want to do? Go ahead.

<no audio – failure hint> First step is to void mom's future benefits. Click the **Benefit Management** menu.

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

### **Mom FAW**

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

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

<cursor spins>

### **Mom Void**

<no audio – failure hint> Click the **Selected checkbox** to select the December benefits.

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

### **Mom Void 1**

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

### **Open Food Rx**

We need to verify her food package, so click that tab.

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



## Mom Food Rx

Mom is fine with the default food package the system created when we changed Carl from Fully breastfeeding to Mostly. So let's issue benefits. Go ahead.

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

## Issue Benefits

Since we are tri-monthly, and it's currently November, we'll just issue the December and January benefits. Go ahead and do what needs to be done. After issuing, print the Account Balance.

<no audio – failure hint> Click the **checkbox next to Carl's suggested February set** to remove the checkmark.

## Issue Benefits 1

<no audio – failure hint> Click the **checkbox next to Momma's suggested February set** to remove the checkmark.

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

<cursor spins>

## Aggregated

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

## Aggregated1

<cursor spins>

## Close Aggregated

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

## Mom Account Balance

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

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

## Mom Account Balance 1

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

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

### **Account Balance**

<no audio> Click when ready to continue.

<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.