Managing Representatives

Intro

This HuBERT on-demand training module …

Intro1

… is provided by the MN Department of Health WIC Program. It provides an overview of managing authorized and alternate representatives.

Deleting/Adding Representatives

Delete

Issa's mom wants to change her alternate representatives. So, where do we go, from this screen, if we need to delete and add representatives? Go ahead.

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

<no audio – failure hint> Select **EBT Household Demographics**.

Delete 1

We've already looked at the representatives in previous modules. So, do you think at this point you could delete Pa Bell and then add Auntie Bell instead? If you get stuck, click anywhere on the screen and a hint will display.

Delete 2

<no audio – failure hint> Click on **Pa Bell's row** to highlight it.

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

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

Add 1

<no audio – failure hint> Click the **Add Alt Rep/Proxy** button.

<no audio> Type: Bell and press the Tab key on the keyboard.

Add 2

<no audio> Type: Auntie and click the Relationship drop-down arrow.

Add 3

<no audio – failure hint> Select **Aunt** from the **Relationship** drop-down.

Add 4

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

Add 5

Assuming we are done making changes, what's our last step? Go ahead.

<no audio – failure hint> Click the **Send EBT Data** to communicate changes to the WIC Processor and save changes to HuBERT.

Verify Change

Where can we verify our representative changes in Demographics? Go ahead.

<no audio – failure hint> Click the **AdditionalInfo2** tab.

AddInfo2 3

Go ahead and open the EBT Household Demographics screen again using the button this time.

<no audio> Click the **EBT Household Demographics** button.

<no audio> EBT HH Demo opens.

Deleting Primary

Let's see what happens if we try to delete our Primary Cardholder. Go ahead and try it.

<no audio – failure hint> Click the **Primary Card Holder** row to highlight it.

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

Deleting Primary 1

According to this message, we cannot delete the Primary Card Holder unless we deactivate the card or set someone else as the Primary Card Holder first.

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

Changing Authorized Rep

Update Auth Rep

We don't need to delete our Authorized Rep to change them. Instead, we can simply update them.

Let's change our Primary Cardholder to Grandma Bell.

<no audio> Double-click inside the **First Name** field.

<no audio> Type Grandma and double-click inside the Date of Birth field.

Update Auth Rep1

<no audio> Type 10/13/1955 and click on the Relationship drop-down.

Update Auth Rep2

<no audio> Click above the scroll bar.

<no audio> Select **Grandmother.**

Since we've changed the Authorized Representative we need to click the **Update** button.

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

Notice the status now reads: EBT Update Needed, which means we need to Send EBT Data

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

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

Any time we change a Primary Cardholder, the system will require us to capture their electronic signature.

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

<no audio> Click the **Save Signature** button.

Update Auth Rep3

<screen description> EBT HH Demo screen closed and PF Demo tab displays.

Changing Primary Card Holder

Primary Cardholder

Just in case a scenario presents itself whereby we would need to change the Primary Card Holder to another representative, since any representative can be the Primary Card Holder, we can also change the Primary Card Holder to another representative.

To set another representative as the Primary, we simply select their row…

<no audio> Click the **Alternate Representative/Proxy 1** row to highlight it.

…add the birthdate, which we know we need as one of the Primary Cardholder validations…

<no audio> Type: 10/13/1985 and click the **Update** button.

Change Primary1

…and click the **Set as Primary** button.

<no audio> Click the **Set as Primary** button.

Again, the Status informs us that we need to Send EBT Data.

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

<no audio> Click **OK**.

Since we've set a new Primary, we have to capture their signature…

<no audio> Click the **Capture Signature** button.

<no audio> Click the **Save Signature** button.

Transition Slide

<no audio> Back to Demographics screen.

And the EBT Household Demographics screen automatically closes.

Change Primary2

Remember, the card validations are based on the Primary Card Holder's date of birth. If we change the Primary Card Holder, we must inform the representative that their date of birth will now be used for identity validation.

End

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