Voiding Benefits

Intro

This HuBERT on-demand training module…

Intro1

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

Introduction to Food Adjustment Wizard

BM Menu

Go ahead and open the Benefit Management menu…

<no audio> Click the **Benefit Management** menu.

Open FAW

…and select the Food Adjustment Wizard.

<no audio> Select **Food Adjustment Wizard.**

FAW

The Food Adjustment Wizard is where we go to make changes to foods that have been issued to a WIC Card.

It has 5 options: Change a Food Already Issued, Add More Formula, Add Infant Solid Foods, which automatically enables when appropriate, Void Future Benefits and Void Current and Future Benefits.

Void Current & Future Benefits

Scenario

Today is August 14th.

Mom has come to clinic today because Izzy has been having a lot of stomach upset lately and one of mom's friends suggested she try soy formula.

She just came in two days ago and was issued Similac Advance.

According to mom she hasn't redeemed any formula and is wondering if we can change the formula issued to her WIC Card.

Show Details

We can see Izzy was issued August, September and October benefits and that her current set, or the set that includes today's date, began on August 12th.

Always Check

Although mom said she hadn't bought any formula…

…before we do any adjustments to foods issued to a WIC Card, we should always check what kind of redemptions may have occurred.

Go ahead and open Izzy's participant folder and then open the screen where we can verify redemption information.

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

<Cursor Spin>

Open Trans Hx

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

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

<Cursor Spin>

Trans Hx Dates

Remember, our search is limited to one month and our End Date defaults to the current date.

Since we are only interested in Redemption Activity for the current benefit set, we can keep it simple by always entering the PFDTU of the current set of benefits into the **Start Date** field.

Trans Hx Dates 1

So, go ahead and select August 12th , Izzy's cycle start date, from the Start Date drop-down calendar and search the 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 **August 12th**.

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

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

No Records

When no records display after a search we can infer that no redemptions occurred.

Lots of Records

So, what if there are a lot of members in the household and/or a longer time period for redemption?

More Records

This could mean the potential for a large number of transactions. In these instances, the Transaction History can be clumsy since you have to view the details for each record to see whom each redemption is for.

No Records 1

Go ahead and close this screen.

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

Open Ben Hx

So, another option: We can verify what was issued and compare it to the Account Balance.

Where would we go to see what was issued? Go ahead.

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

Ben Hx

We want to see what was issued for August. Go ahead and open the nodes.

<no audio – failure hint> Click the plus next to the 08/12/2019 - 09/1//2019 row.

<no audio – failure hint> Click the plus next to benefit number 35790329.

She was issued 24 oz infant cereal, 16 jars fruits and veggies, 4 dollars for fresh fruits and veg and 7 cans of Similac Advance.

OK. Now let's print the Account Balance, displaying it on the screen. Go ahead.

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

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

Print Balance

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

Account Balance

Remember, the account balance shows what is left on the card. Amounts less than what was issued would indicate redemptions.

Since the quantities are the same as issued, as we saw in the Transaction History, there have been no redemptions.

Keep in mind that this works because there is one infant who would receive different food items from other potential members in the household. It wouldn't work if there were multiple children in the household. Since redemption is randomly assigned, we wouldn't be able to tell whose benefits were redeemed without looking at the transaction history details.

Transition

Voiding Current

Let's talk about voiding current benefits issued to the WIC Card.

In the Food Adjustment Wizard, we can void just the future benefits or we can void the current and future benefits.

However, if there is ANY REDEMPTION at all for the current set of benefits, we CANNOT void current benefits.

Voiding current sets of benefits for participants that have redeemed some of their food items can result in our not being able to adjust the issued foods at all.

If there is any question about whether the current benefits can be voided, we MUST call the Help Desk for assistance before voiding them.

Voiding Current 1

There are two other instances when we should never void current benefits.

The first is if the benefits were direct-shipped.

If their PFDTU is the current date or a date in the past, they are automatically **redeemed by the system** and should never be voided.

Remember! Direct shipped benefits will not show up as redeemed in Transaction History because they are not redeemed by a store or a vendor.

Voiding Current 1A

If incorrect foods are issued along with direct-shipped formula, and the direct-shipped formula has been automatically redeemed, we must use the other Food Adjustment Wizard functions to correct or adjust the food items. We cannot void them because the formula was direct-shipped and has been redeemed.

Voiding Current 2

The second instance is if food items have already been adjusted. If any of the food adjustment functions, such as Change a Food Already Issued, Add More Formula or Add Infant Solid Foods, have already been used on the current set, it should never be voided.

<transition needed>

Open FAW 1

OK. So now that we made voiding current benefits kind of scary, let's void Izzy's current and future sets since we know there hasn't been any redemption, they weren't direct-shipped and no other changes have been made to the set, which we can see here in Benefits History.

Go ahead and open the Food Adjustment Wizard.

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

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

FAW 1

Our default is to Change a Food Already Issued, which we COULD do in this instance. But, in this module, we are looking at voiding so that's what we'll do, and we'll take a look at changing a food already issued in another training module.

To void current and future, we simply select the radio button…

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

…and click OK.

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

<cursor spins>

FAW1A

This is an all or nothing function, meaning it automatically voids all sets of benefits that are currently issued to this participant. We can't select which benefit sets we would want to void.

And verify that Yes we do want to void these benefits.

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

<cursor spins>

This message reads: Current and future benefits were successfully voided. Direct shipped benefits with a paid date were not voided.

This last sentence is moot since **we would never void** any benefits with direct-shipped formula that has been redeemed.

Click OK to finish our void.

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

Voided

OK. So let's take a look at our voided benefits. How can we do that quickly and simply? Go ahead.

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

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

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

We'll just quickly expand our nodes…

And we can see that all the benefits were voided and if we expand further…

We can see that each issued food item was voided.

Our next steps now that we've voided her benefits is to update her food package with Similac Soy Isomil Powdered formula and issue benefits. Go ahead and do that.

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

FP Tab

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

Add DFP

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

Select Formula

<no audio – failure hint> Select 7 - Similac Soy Isomil (12.4 oz. pwd).

New DFP

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

\<Transition Slide\>

Open Issue Ben

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

Issue Ben

When the system voids benefits, it resets the participants **last** Last Date to Use, which is stored in the database and used to determine which sets should next be issued, back to the LDTU just prior to issuance of the voided benefits.

By setting the LDTU back, the system is able to re-suggest benefits that have already been issued.

Go ahead and finish issuing. Don't print the shopping list.

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

Send EBT Data

\<displays on screen\> Always take one last look at the food package and make sure it is correct before issuing to the WIC Card.

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

Sending

\<displays on screen\> Cursor spins.

Close Agg

\<displays after 5 seconds\> This screen does not automatically close. Click the Close button or the X to exit.

Open Ben Hx1

Let's verify our issuance in benefits history.

\<no audio – failure hint\> Click the **Benefits History** tab.

Ben Hx 1

Both the voided and issued sets for each month display and if we expand some of the nodes…

Ben Hx 2

…we can see the new food items issued.

\<no audio\> Click below the scroll bar.

Ben Hx 3

\<displays on screen\> Food items issued for August, including Similac Soy Isomil.

We can also verify issuance for the participant by printing the Account Balance…go ahead…

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

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

Verify

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

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

Or, they can see it immediately in the App.

Void Future Benefits

Scenario 1

Today is August 19th.

Ann Teak's dad brought her in for an appointment a couple of days ago and changed her food package so that it didn't have cheese and yogurt anymore.

Today mom is here and would like the cheese and yogurt, which Anne eats for snacks, to be added back to her food package.

According to mom, she was at the grocery store before she looked at her App and realized this.

So she redeemed some of the foods on her WIC Card.

Since there are multiple household members, we will need to verify whether any of the redemptions belong to Anne.

Scenario 1A

Anne was issued benefits for August, September and October.

Take note of her PFDTU for the August set, which is August 15th since we'll use this for the Start Date in the transaction history.

Go ahead and open Anne's folder and then open the transaction history.

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

<Cursor Spin>

Open Trans Hx 1

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

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

Trans Hx

Remember, we want to use the PFDTU of the August set to check for redemptions.

Go ahead and select her PFDTU from the Start Date drop-down calendar and then search for redemption records.

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

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

<no audio – failure hint> Select **August 15ᵗʰ**.

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

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

Redemption Records

Double-click the first redemption record to view its details.

<no audio – failure hint> Double-click the first redemption record to view its details.

So, there are redemptions for Anne.

Let's exit out of Transaction History.

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

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

Open FP

Before we go any further, we should verify Anne's food package and make sure it really doesn't have cheese and yogurt.

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

FP Tab 1

The food package with an effective date the same as her August PFDTU, 8/15, does not have cheese or yogurt.

OK. Verified. So, now let's open the Food Adjustment Wizard.

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

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

FAW 2

We know we can't void current and future benefits because there have been redemptions.

And, if we knew how to change a food already issued, which we don't yet, we still wouldn't be able to because cheese and yogurt weren't already issued.

This brings up an important caveat to note: if a food item, and were are talking foods, NOT FORMULA, isn't originally issued to the WIC Card, it cannot be added for the current month once redemptions have occurred.

If no redemptions, we could have just voided Current and Future Benefits, created a new food package, and reissued the benefits, similar to what we just did for Izzy Madd.

FAW 3

But, because there was redemption, we cannot do anything for the current month. We can only void the future benefits, create a new food package with cheese and yogurt, and reissue the future benefits.

FAW 4

So, our only option is to Void Future Benefits. Go ahead and select the radio button.

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

And click OK.

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

Void Future

When voiding future benefits, unlike Void Current and Future Benefits which was all or nothing, we can choose which sets we want to void. In this instance, and probably most instances, we want to void both.

<no audio> Click the **Selected checkbox** for the September benefits.

<no audio> Click the **Selected checkbox** for the October benefits.

Click the **Send EBT Data** button to communicate our void to the WIC Processor and save the change in HuBERT.

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

Void Future 1

And click OK.

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

Open Ben Hx 2

Let's verify our voids in Benefits History.

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

Verify Void

Click the first node for October, September and August.

<no audio – failure hint> Click the **plus** next to the 10/12/2019 – 11/11/2019.

<no audio – failure hint> Click the **plus** next to the 09/12/2019 – 10/11/2019.

<no audio – failure hint> Click the **plus** next to the 08/15/2019 – 09/11/2019.

Both October and September are voided while August is not (as expected).

OK. Let's go back to the food prescription tab...

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

Add DFP 1

...and create a new default food package.

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

Add DFP 2

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

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

Open Issue Ben 1

And we are ready to re-issue benefits.

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

Reissue

Notice Anne's last set's Last Date to Use was shifted back to 9/11/2019. This allows the system to suggest that the next set of benefits start on September 12, while Beau's last Set's LDTU remained at 11/11/2019.

His issuance message reads: The difference between the Last Date to Use and the current system date if not 75 days or less.

One of the rules governing issuance is that the system cannot issue a set too far into the future. If there are 75 days or more between today's date and the last set's LDTU, the system will not suggest any benefits.

Reissue 1

What do you think we need to do before issuing benefits? Go ahead.

<no audio – failure hint> Click to remove the checkmark in front of 11/12/2019 - 12/11/2019 (the November benefits).

Yep! Whenever possible we want to keep issuance cycles for household members in sync, which means Anna and Beau should have the same last set LDTU once we reissue to Anne.

Go ahead and issue. Although mom uses the app, let's also display the Account Balance to the screen so that we can verify our issuance.

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

Reissue Agg

<display on screen> Remember to always verify the food package one last time before issuing.

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

Print Acct Bal

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

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

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

Account Balance

We can see their remaining August benefits and the addition of the yogurt for children 1 to 2 years old and the additional pound of cheese for September and October.

End

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