

# Change Household ID – Create New Household

## Custody Change/Foster Care – page 1



### Assess Redemption for Participant Changing Households

If the food package will need to be reissued, redemption should be assessed.

- Click **Benefit Management** menu
- Select **EBT Transaction History**
- Type **PFDTU of current set of benefits** into *Start Date* field
- Click **Redemption Activity** radio button
- Click **Search** button
- Click each row displayed then the **View Details** button – **have ALL food items for this participant been REDEEMED?**
  - If ALL food items were redeemed and **FORMULA WAS ISSUED** follow cheat sheet:  
[Change Household ID – All Food Items Redeemed](#)
  - If ALL food items were redeemed and formula was NOT issued, OR the participant still has non-redeemed food items, continue using this cheat sheet.

### Change Household ID Guided Script

All steps must be performed **in order and completed** before exiting the Change HHID Guided Script.

- Open Participant Folder for participant being moved to a new household
- Click **Participant Activities** menu
- Select **Change Household ID**
- Click Step 1 - **Determine New Household**
  - Click **Create New Household**
  - Complete all required fields in the *Create New Household* screen
  - Select **Custody Change** from *Reason for ID Change* drop-down
  - Click **OK** (or press Enter on the keyboard)
  - Click **Close** on the *Change Household ID* screen
- Click **Step 2 - Remove Current Benefits**
  - If ALL benefits have been redeemed, the “Void/Replace Benefits for EBT Account” message will display.
    - Click the **OK** button.
    - A checkmark will display for *Step 2 – Remove Current Benefits* and the screen will not open
  - If ALL benefits have NOT been redeemed
    - Assess food package being suggested in the **Benefits to Remove for Current Month** (these are the foods and quantities that will be transferred to the new card)
      - Adjust quantities?
        - Suggested quantities can be edited by clicking the cell in the food item row of the **Quantity** column and typing a new value
        - This will decrease the quantities remaining in the household balance (shown, but not deducted when the quantity is edited, in the **Benefits for Current Month** grid)
      - Reissue a Full Set of Benefits?
        - Click the **Reissue a Full Set of Benefits** checkbox
        - Select the appropriate **Package Size** based on the remainder of the issuance cycle
      - Click **Send EBT Data**

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## Custody Change/Foster Care – page 2

- Click **Step 3 - Remove Cards**
  - Are other members still being issued benefits to the “old” household’s WIC Card?
    - No - removing the last participant being issued benefits to the WIC Card (such as if moving child from foster care back into their family’s household)
      - Click the **Primary Cardholder row**
      - Click **Deactivate Account**
    - Yes - other members are still being issued benefits to the WIC Card – do nothing
  - Click **Send EBT Data**
  - Click **OK** (or press Enter)
- Click **Step 4 - Review New EBT Household Demographics**
  - Set Primary Card Holder
    - Click **Authorized Representative row**
    - Enter Auth Reps Date of Birth
    - Click **Update**
    - Click **Set as Primary**
  - Assign Card
    - Click **Assign Card** >> Enter (swipe) new card >> Click **OK**
  - Click **Send EBT Data**
  - Click **OK** on *EBT Household Demographics* message
  - Click **Capture Electronic Signature** >> Have Primary Card Holder sign the signature pad >> Click **Save Signature**
- Click **Step 5 - Add Benefits to New Household**
  - **Reissued Full Set of Benefits** selected in *Remove Current Benefits* step?
    - Yes
      - The *Food Prescription* screen displays
        - Assess if food package is still appropriate
        - Edit/add as necessary
        - Click **Close**
      - If formula is being re-issued the *Direct Shipped Benefit Items* window displays
        - Should display the current benefit period, type, and quantity of formula
        - Click the **Finish** button
      - The *Aggregated Issuance for EBT Account* window displays
        - The current benefit dates should display along with food package being re-issued
        - Click the **Send EBT Data** button
        - Once the *Status* changes to “Issuance Received. Success!”, click the **Close** button
    - No – Food Prescription screen does NOT display
      - Click **Send EBT Data**
      - Click **Close**
- Click **OK** on *Household Change Guided Script* message: “Future benefits were voided. Click Issue Benefits from the participant folder to reissue future benefits.”
- Click **Close** on *EBT Household Change Guided Script* screen
- Ensure food package for future months is still correct in the Food Prescription tab
- Click **Issue Benefits** icon and re-issue future sets of benefits to household’s WIC Card