Adjust Benefits Overview #1

04/21/2022 – WINNIE THE SCOOP NEWSLETTER #18

Introduction

First Slide

This module is the first overview of Adjust Benefits in WINNIE and is provided as part of the monthly WINNIE the Scoop! Newsletter #18.

Overview

Housekeeping

As we review this, please keep in mind that some screens may still be under development.

Also, please note that the browser zoom is set to 67% and that is for optimal viewing of this module.

Overview 1

Adjust Benefits is a more robust version of HuBERT's Food Adjustment Wizard.

It allows us to make changes to issued benefits.

Overview 2

In this module, we will provide an overview of the screen, as well as take a look at a specific scenario that includes exchanging infant foods for increased formula, providing a new formula when the current benefits have been partially direct-shipped and had some redemption, and voiding future benefits.

Setup Scenario

Setup

Today is April 12th.

Dan Dee is a 7-month-old infant who is some-breastfeeding, has Food Package III, and requires some changes to his current benefits.

Let's checkout his Benefits History.

Benefits History

Toggle on his April set of benefits.

Scroll Bar

And click below the scroll bar to see the full issuance.

Issued

He was issued benefits on April 11th, which was yesterday.

2 cans of Elecare were direct shipped, and since the PFDTU is in the past, the Status is Paid (or redeemed).

He was also issued 5 more cans to the WIC card, as well as infant cereal and fruits and vegetables.

And it appears that **some** of these food items have also been redeemed because the Status is also Paid.

Since we haven't seen Transaction History yet in WINNIE, let's go there next.

Select Manage eWIC Account from the navigation pane.

Transaction History

Manage eWIC

The Manage eWIC Account screen is where we add representatives, set the primary cardholder, assign the card, reset the PIN count and deactivate cards.

We can find Transaction History on the left pane of this screen.

Go ahead and select it.

Transaction History

Like HuBERT, WINNIE auto-populates the search dates for 30 days prior to today.

Since Dan didn't have any issuance prior to April 2022, we can just leave them as is.

Go ahead and click the Transaction Type drop-down.

Transaction Type

The options are the same as HuBERT: Benefit or Redemption Activity.

Let's stick with Both. Click the Search button.

Transaction Results

Our results show our three sets of benefits issued on April 11th and that a purchase was made that same day.

We can view the purchase by either selecting a row and clicking the Show Details button or simply double-clicking the row.

Let's double-click it.

Spin

<no audio> Cursor spins. Working…please wait.

Transaction Details

We can see 2 cans of Elecare formula were purchased.

Go ahead and click the Close button.

Adjust Benefits & Health Info

Setup 1

So, today, April 12th, the Dees have returned with the appropriate paperwork to provide increased formula in lieu of infant foods.

They also have 3 unopened cans of Elecare with them that they want to return because the prescription has been changed to Neocate instead of Elecare, which they are going to try for one month.

So, we need to adjust the current benefit set.

Select Adjust Benefits from the navigation pane.

Adjust Msg

Like HuBERT, and Issue Benefits, messages display if dates must first be verified.

Since Dan is some-breastfeeding, the message displays that we must update his Breastfeeding Verified Date before adjusting the benefits.

If he were only Food Package III, a message would display indicating that the Food Package III Verified Date needed updating.

Go ahead and update the Breastfeeding Verified Date. Click for a hint.

<hint> Select Health Information from the navigation pane.

Health Info

<no audio – instruction> Use the calendar icon in the Breastfeeding Verified Date field.

<hint> Click the calendar icon in the Breastfeeding Verified Date field.

BF Date

< hint> Select today's date, April 12th.

Save Health Info

If we click Save now…

<no audio> Click the Save button.

FP III Msg

…since Dan is also Food Package III, a verification message displays beneath the Food Package III Verified Date since it must be today's date to save changes to this screen.

Select Today's date using the calendar in that field.

<no audio – instruction> Use the calendar icon in the Food Package III Verified Date field.

<hint> Click the calendar icon in the Food Package III Verified Date field.

FP III Date

<no audio - hint> Select today's date, April 12th.

Save Health Info 1

Save our changes.

<no audio> Click the Save button.

Spin

<no audio> Cursor spins.

Adjust Benefits

We're ready to return to Adjust Benefits. Go ahead. Click for a hint.

<hint> Select Adjust Benefits from the navigation pane.

Spin

<no audio> Cursor spins. Working…Please wait.

Adjust Benefits – Screen Overview

Adjust Grids

Unlike HuBERT, all functions performed when adjusting benefits occurs on this one screen.

The Adjust Benefits screen displays each issued benefit period with a Last Date to Use in the future.

The current set displays first followed by any future benefit sets.

For participants issued both formula and foods, two separate grids display, one for Formula Items and one for Food Items.

For now, let's just focus on the formula grid.

Column Headers

Go ahead and take a minute to hover over each column header to view the full label in a tool tip. Click the button when ready to continue.

Max Amt

The formula grid displays the type of issued formula and has two coordinating rows, one based on cans and the other on reconstituted ounces.

The first column indicates the maximum number of cans **that can be issued** and unlike HuBERT, will not observe if the issued food items were prorated.

The max is strictly based on the participant's current WIC Category, current Breastfeeding Amount, and the Age Category at the time of issuance.

Max Amt 1

If the participant is Food Package III, like Dan, then the Max Amount reflects the maximum quantity allowed for that specific food item.

The ounces row reflects the number of reconstituted ounces, which is 95 calories per can as indicated in our Elecare grid and multiplies it by the number of cans in the row above it, which in this instance is 10 for a total of 950.

EBT Amt Column

The sum of the EBT Amount Issued and DS Amount Issued columns reflects the total number of cans provided in the benefit.

The Household EBT Balance column indicates the number of cans still left on the WIC Card.

We saw previously 5 cans were originally issued to the card and 2 cans had been purchased.

Redemption Column

The Redemption column is straightforward when only one member of the household is issued a specific food item like in this instance.

In the next month's training module, we will take a look at how Adjust Benefits treats Redemption when more than one member of the household has been issued the same food item.

For this household though, it is the sum of the **redeemed** DS Amt Issued and the number of cans already purchased.

Since 2 cans were direct shipped with a PFDTU of April 11, and thus redeemed, and 2 cans were purchased as we saw in Transaction History, the Redemption column displays 4 cans.

Ret & Rec Columns

The Returned column is the number of unopened cans that may have been purchased, or were direct shipped and already redeemed, and are now being physically brought back to the clinic.

The Recovered column is the number of cans removed from the WIC Card when adjusting the benefits.

Last 3 Columns

The Available column is the number of cans the system will allow us to issue to the card while the Additional Quantity column is the number of cans we actually issue to the card.

Lastly, is the Direct Ship toggle, which will enable once the Additional Qty is greater than 0.

Food Items Columns

Most of the columns are the same in the Food Items grid.

However, since we do not allow foods to be direct shipped, the Amt Issued isn't broken into two columns, EBT and Direct Ship, like the Formula Items grid.

And, since the HH Balance is all on the WIC Card, the Household Balance header does not specify EBT.

Lastly, since we do not allow participants to return foods, the Return column does not display in the Food Items grid.

Void Toggle

We'll checkout the Update Future Months button in next month's training module.

However, the Void toggle for a benefit set is disabled if there are any direct shipped formula items with a PFDTU in the past or if a redemption is indicated for that benefit set.

Because of these restrictions, if we wanted to void benefits, we'd only be able to void Dan's future benefits.

Adjust Benefits - Scenario

Max & Available

Let's get back to adjusting Dan's benefits.

Remember, we are increasing the formula in lieu of infant foods, returning 3 unopened cans of Elecare and issuing a different formula, Neocate, which they are trying for one month.

Although the max is 10, and we only issued 7 cans, the Available is 0.

Since Dan is FP III, the formula grid works in conjunction with the Food Items grid.

To allow issuance of the max number of cans, all infant foods that were issued will have to be recovered.

Let's do just that.

Double-click into the Recovered infant fruits and vegetable column.

<no audio> Double-click in the Recovered field.

Recover F/V

We are going to recover all 32 jars of the infant fruits and vegetables.

Type 32 and press the Tab key.

Recover Cereal

Our Available in this row is no longer 0 but 32. Our Available in the Formula grid remains 0.

Double-click into the Recovered infant cereal column.

<no audio> Double-click in the Recovered field.

Recover Cereal 1

Now let's recover all 24 ounces of infant cereal.

Type 24 and press the Tab key.

Available Formula

Our Available cereal is no longer 0 but 24.

However, notice our Available formula is now 3 cans and the system auto-calculates the number of ounces.

OK. We've removed the infant foods from the WIC Card.

Next let's return the 3 unopened cans of Elecare they brought with them to the clinic.

<no audio> Transition to validation message "This value cannot be greater than Redemption."

Returned Validation

We should note that WINNIE has validations to ensure we can't return more than a household has purchased.

<no audio> Transition back to previous screen.

Return Formula

Go ahead and double-click into the Returned cans column.

<no audio> Double-click in the Returned field.

Return Formula 1

Enter 3 and press the Tab key.

Calculations

The system auto-calculates the changes and it's all displayed in this grid.

Now we have only 1 can under Redemption and 6 cans under Available.

Since we are changing formulas, we also need to remove all cans from the WIC Card, so next we'll recover the 3 cans from the HH EBT Balance column.

Double-click into the Recovered cans column.

<no audio> Double-click in the Returned field.

Recover Formula

Type 3 and press the Tab key.

Recover Formula 1

Our HH EBT Balance is now zero and the number of cans available to issue, at least for Elecare, is 9.

Now let's change our formula. To do that, we click the Add Formula Item button.

Formula Item Modal

The Formula Item modal opens.

Because Dan is Food Package III, the Formula Type defaults to Special Prescription.

On the right, the Food Item Calculator shows, in reconstituted ounces, the maximum number allowed, the number already allocated, which is the 1 can we did not return or recover and the remaining number of ounces that can be issued.

To select the new formula, Neocate, click the Food Item drop-down.

Food Item

Select Neocate Infant with DHA & ARA.

Spin

<no audio> Cursor spins. Working…Please wait.

Special Rx Item

Like HuBERT, the Special Prescription Item card displays once the formula is selected.

We're familiar with this so we'll just quickly complete the required information.

Spin Arrows

Notice that this prescription is only good for this month since they will be trying this new formula.

Also, notice that the default number of cans is 8, not 9.

And if we were to try to increase it using the spin arrows, which display once we hover over the Quantity.

Go ahead and click the spin-up arrow.

Quantity Limits

The value will not increase.

 If we try to type 9 into the field…

Quantity Limits 1

… a validation will display indicating the value exceeds the food item limit and must be reduced.

Reconstituted Oz

So why is this?

If we look at the number of reconstituted ounces for Neocate, we can see it is higher than Elecare, 97 instead of 95, and the max number of cans is 9 instead of 10.

<screen description> Medical formula grid for Neocate displays.

We need 97 ounces to add one more can but our calculator is showing that we only have 89 available.

By adding the food item calculator, as well as displaying calculations in the grid, the hope is that WINNIE provides more information so that the processes behind adjusting benefits are easier to understand.

Save New Formula

Click the Save button.

New Formula

Two new rows are added for Neocate.

The Available quantity for Elecare is now 0.

Although the calculator indicated there were 89 ounces left, that does not display since the ounces are a product of the number of cans multiplied by the reconstituted ounces.

Notice the Direct Ship toggle is now enabled since there is a value in the Additional Quantity field.

We are going to do a partial direct ship. Go ahead and toggle it on.

Scroll Bar

Click below the scroll bar.

Direct Ship

Like in Issue Benefits, the Direct Shipped Items card opens beneath the benefit set.

We are going to direct ship 4 cans.

Go ahead and complete the Ship To and Direct Ship Quantity fields. Click for a hint.

<hint> Click the Ship To drop-down.

In Stock

<hint> Always select In Stock when direct shipping formula.

DS Quantity

<hint> Click to insert cursor into Direct Ship Quantity field.

DS Quantity 1

Press the tab key after entering the quantity.

<hint> Click to insert cursor into Direct Ship Quantity field.

Void

Since they are going to try the new formula for a month, we are going to void their future benefits, which we can always do since no redemption, either by direct ship or purchases, has occurred yet.

Toggle on void.

Void 1

Once void is toggled on, all active fields are disabled for the benefit set.

Click below the scroll bar.

Future Set

Voiding the first future set automatically toggles on the void for the second future set.

To save our change, we click the Send eWIC Data button at the bottom of the screen.

Spin

<no audio> Cursor spins. Working…Please wait.

Data Sent

The Status Accepted (no errors) displays once the information has been successfully communicated to the EBT Processor.

The adjusted benefit set displays:

Elecare issuance for 1 can that was direct shipped, redeemed and not returned.

For Neocate, we have a 9 can max but remember, could only issue 8 cans due to the reconstitution amount.

For those 8 cans, 4 were issued to the WIC Card and 4 were direct shipped.

Can Still Adjust

Notice that the currently issued formula could still be adjusted.

And if we needed to adjust the food items, we can click the Food Items toggle accordion.

Go ahead and do that.

<no audio> Click the Food Items Toggle Accordion.

Adjust Food Items

<screen description> Green arrow points to Add Food Item button, which is available.

OK. Let's look at how these adjustments display in Benefits History. Go ahead.

<hint> Select Benefits History from the navigation pane.

Benefits History – after Adjust Benefits

Ben Hx Adjusted

Toggle on the April set of benefits.

Ben Hx Adjusted 1

The first two cards contain today's issuance.

The top card displays the 4 cans of direct shipped Neocate with a Status of Paid while the bottom card displays the 4 cans of Neocate issued to the WIC Card.

Clicking below the scroll bar…

Ben Hx Adjusted 2

…we can see the original set issued on 4/11.

Again, direct shipped in the top card indicating one can was returned.

In the bottom card, if we hover over the status of the formula issued to the WIC Card, a tooltip displays so that we can see what was recovered and returned.

Click Continue when ready to move on.

Ben Hx Adjusted 3

The infant foods that were recovered also display.

Go ahead and toggle on the May set.

<no audio> Toggle on the May set of benefits.

Ben Hx Adjusted 4

The May Card indicates all food items were voided.

Toggling on June…

<no audio> Toggle on the June set of benefits.

Ben Hx Adjusted 5

…we can see all formula and food items were also voided.

Let's go back to Transaction History. Do you remember where it is? Click if you need a hint.

<hint> Select Manage eWIC Account from the navigation pane.

Transaction History – After Adjust Benefits

Trans Hx

<hint> Select Transaction History from the left pane.

Trans Hx Search

Click the Search button.

Trans Hx Details

There are 4 new records. Go ahead and view them all. Double-click each row starting with the top one.

<hint> Double-click the first Debit/subtract row.

Details Row 1

<hint> Click the Close button.

Trans Hx Details 1

<hint> Double-click the second Debit/subtract row.

Details Row 2

<hint> Click the Close button.

Trans Hx Details 2

<hint> Double-click the third Debit/subtract row

Details Row 3

<hint> Click the Close button.

Trans Hx Details 3

<hint> Double-click the 4th row - Issuance/Add.

Details Row 4

<hint> Click the Close button.

Food Prescription – after Adjust Benefits

Food Rx

Last thing. Let's look at Food Prescription. Go ahead. Click for a hint.

<hint> Select Food Prescription from the navigation pane.

Food Rx 1

Like HuBERT, it creates the food package issued for today. Go ahead and expand it.

<no audio> Click the Effective Date to expand the Food Prescription.

Special Rx

Since the food package that was issued contained 1 can of Elecare and 8 cans of Neocate, that is what the prescription consists of.

If we single-click the Neocate row…

Special Rx Item FP

…we can view the Special Prescription Item information we completed in Adjust Benefits.

If we double-click the Neocate row…

Special Rx Item FP 1

…since the Effective Date is today, and not yet in the past, we can modify the food prescription if needed.

However, since this is what was issued, the only thing we should modify is any information in the Special Prescription Item card, and only if a correction is necessary.

Go ahead and expand the May food prescription.

Delete Food Rx

The 9-month food prescription still has Elecare in it and we aren't sure what formula will be issued next month.

So, let's delete this food package. Go ahead. Click for a hint.

<hint> Click the Delete button across from the Effective Date.

Delete Food Rx 1

<hint> Click the Yes button.

Transition

<screen> Screens transitions from food package to next month's module.

Next Month

Next Month

In the next WINNIE the Scoop! we'll continue our review of Adjust Benefits, including how WINNIE calculates redemption for a household when more than one member has been issued the food item being adjusted. We'll also take a look at that Update Future Months function.

End Slide

Thank you for taking the time to review this WINNIE overview module.

Minnesota Department of Health - WIC Program 85 E 7th Place, PO BOX 64882, ST PAUL MN 55164-0882; 651-201-3942, health.wic@state.mn.us, www.health.state.mn.us; To obtain this information in a different format, call: 651-201-3942