

Issue Benefits Overview #2

CREATED 03/02/2022 – WINNIE THE SCOOP NEWSLETTER #17

Overview

First Slide

This module is the second overview of Benefit Issuance in the WINNIE System and is provided as part of the monthly WINNIE the Scoop! Newsletter #17.

Transition

<no audio> Transition from blue screen to Participant Search page in WINNIE.

Intro

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.

HHID

To begin, today is March 1st, 2022.

Let's search by Household ID. Click into that field. Type: 13501485 and press the Enter key or click the Search button.

Minimize 1

Let's also maximize our real estate. Click the hamburger icon, or the toggle sidebar icon, above the navigation pane to minimize it.

Show Details

Go ahead and toggle on Show Details. Click anywhere if you need a reminder as to how to do that.

<hint> The Show Details toggle is in the right bottom corner of the Search Criteria panel.

Minimize 2

Now let's minimize the Search Criteria panel by clicking the Toggle Panel icon.

View Details 1

And let's look at each member's details, starting with Kay, then Lyle and Terry. Click anywhere if you need a reminder as to how to do that.

<hint> Click the rectangular section with the member's information (or the Participant Card) to view their details.

View Details 2

<no audio> Click on Terry's card to display her details.

Open Folder 1

Go ahead and open Terry's folder. Click anywhere if you need a hint.

<hint> Double-click the Participant Card or click the folder icon within the Participant Card.

Transfer Msg

Right. They belong to a different clinic. Click No on the Confirm message verifying whether we want to transfer the participant.

Change Clinic

If we don't want to transfer the participant to the clinic where we are currently working, we can easily change the Clinic. To do that, we click the Clinic drop-down.

New Clinic

And select the clinic they currently belong to, which is Northwest.

<no audio> Select the 092-Northwest clinic.

Open Folder 2

OK. Now that we are working in the same clinic, go ahead and open Terry's folder again.

Click anywhere if you need a hint.

<hint> Double-click the Participant Card or click the folder icon within the Participant Card.

Alert

Close the alert.

<hint> Click the Close button or press the Enter key on the keyboard.

Nav Pane 1

Notice that WINNIE maintained our collapsed navigation pane inside the folder.

And we can hover over the icons to view what they represent.

Nav Pane 2

<no audio> Mouse hovers over Benefit Management icon and tooltip displays.

But let's re-expand the navigation pane. How do we think we do that? Go ahead. Click anywhere if you need a hint.

<hint> Click the hamburger icon (toggle sidebar icon) at the top of the navigation pane.

Participant Menu

The Participant Menu allows us to perform a lot of different functions regardless of the screen we are in.

To change a participant's Issuance Frequency, we click the Participant Menu...

Frequency

...and select Issuance Frequency.

Freq Options 1

The options in the drop-down...

<no audio> Click the drop-down.

Freq Options 2

...are as expected: Monthly, Bi-Monthly and Tri-Monthly.

Let's leave Terry as Tri-Monthly.

Click the drop-down to close it...

Close Frequency

...and click the Cancel button to close the modal.

Issue Benefits

Go ahead and open Issue Benefits. Click anywhere if you need a hint.

<hint> Click Issue Benefits under Benefit Management on the navigation pane.

Spin

<no audio> Working...please wait displays with spin icon.

Issue Benefits 1

We already reviewed the information provided in the Household Member Information and Additional Information sections in the first Overview module, so we'll skip right to the good stuff.

Click below the scroll bar to view Issuance Details.

Messages

Our message for Kay is that she isn't in a valid cert.

Our message for Terry is that we need to update the Food Package III Verified Date. How do we do that from here? Click anywhere if you need a hint.

<hint> We are currently in Terry's folder so simply select Health Information from the navigation pane.

Health Info

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

Verified Date

Since the only date the field will accept is today's date, it defaults to it in the calendar.

Go ahead and select it.

<no audio> Select today's date from the calendar.

Save Health Info

What's our next step? Go ahead. You can click anywhere if you need a hint.

<hint> Always click Save after making changes to the Health Information screen.

Spin

<no audio> Blue circle spins.

Green Banner

The green banner displays once the change has been saved.

Let's verify our food package. Go ahead. Click anywhere for a hint.

<hint> Select Food Prescription from the navigation pane.

Food Rx

We'll be issuing the most recent food prescription from December. Click to expand it.

<no audio> Click the December 21, 2021, food package link.

Special Rx

Let's verify when his prescription expires. Go ahead. Click anywhere for a hint.

<hint> Click the Complete Pediatric row to display the Special Prescription Item card.

Expiration

It expires at the end of March 2022. Let's go back to Issue Benefits. Click anywhere for a hint.

<hint> Select Issue Benefits from the navigation pane.

Spin

<no audio> Working...please wait displays with spin icon.

Issue Benefits 2

And click below the scroll bar.

Recert Due

Keeping in mind the information we gleaned when viewing the Details card in the Search screen, Lyle is due for a recert in April...

<no audio> Lyle's participant card and Details display.

MCA Due

...while Terry is quite overdue for an MCA.

<no audio> Terry's participant card and Details display.

Transition

<no audio> Screen returns to Issue Benefits.

Benefit Plan

And since Terry's prescription ends in March...

...we'll just plan to provide February and March benefits for now.

Like HuBERT, clicking the Edit button next to the first set...

Modify Set

...allows us to modify the suggested proration. Click the Package Size drop-down...

Full Set

...and select Full.

Edit Reason

This enables the Reason drop-down, which is required.

Click the Reason for Editing drop-down.

Edit Reason 1

As of right now, the reasons are the same as in HuBERT: CPA Discretion for which a note should be written, and Late Pickup is Clinic's Fault.

Select Late Pickup is Clinic's Fault.

Save Edit

Click Save.

Spin

<no audio> Working...please wait and spin circles display.

Revert Edit

<no audio> Red circle around "Full" beside first benefit set.

We can change it back to the original suggested proration by clicking the Edit button again...

Revert Edit 1

...and clicking the Revert button.

Revert Edit 2

<no audio> Red circle around "3/4 Package" beside first benefit set.

Go ahead and click below the scroll bar so that we can view Terry's benefit sets again.

Cycle Adjust

We will also be able to manually cycle-adjust benefits in WINNIE. However, at this time, its functionality is still under development, so we won't look at it now.

Like HuBERT, the direct ship indicator displays below the benefit set if the formula can be direct shipped. Go ahead and toggle on Direct Ship for Terry's first set.

Direct Ship

And click below the scroll bar.

DS Items

The Direct Shipped Items card opens at the bottom of the Issue Benefits screen.

WINNIE does have the capability to direct ship more than one benefit set at a time, which may be needed if a syncing and full pack are being provided for one month.

The participant information and benefit period display at the top of the card, followed by the formula and the total quantity being issued.

Since a half package is being issued, the total quantity is 54.

The next two fields are both required, and the Issue Benefits button is disabled until they are completed.

The Ship To drop-down...

<no audio> Click the Ship To drop-down.

Ship To

...displays the same options we currently have in HuBERT: In Stock, Clinic and Participant.

Like HuBERT, we always select In Stock.

DS Quantity

WINNIE differs from HuBERT in that it has the flexibility to allow us to direct ship a partial quantity and issue the rest to the WIC Card.

So, let's do that by entering 30 for the Direct Ship Quantity.

Issue Button

Once a quantity is entered, the Issue Benefits button becomes enabled.

Go ahead and issue.

<no audio> Click the Issue Benefits icon.

Spin

<no audio> Working...please wait. Spin icon

Aggregate 1

Since we direct shipped 30 cans for the February set, 24 cans will be issued to the WIC Card.

And if we click to see next month's issuance...

<no audio> Click below the scroll bar.

Aggregate 2

...we can see that all 107 cans are being issued to the WIC Card for March.

Go ahead and click the Send eWIC Data button.

Spin

<no audio> Working...please wait. Spin icon

Shopping List

Now let's download the shopping list. Click anywhere if you need a hint.

< hint> Click the Generate Shopping List button.

Download

< hint> Click the Open File link.

Shop List

Like in HuBERT, the Shopping List only displays the quantities issued to the WIC Card.

Transition

<no audio> Screen transitions back to the Aggregated Issuance screen from the Shopping List.

Close Download

Back in the browser, click the X in the Downloads panel to close it.

Close Aggregate

And close the Aggregated Issuance modal.

<no audio> Click the Close button.

Open Ben Hx

Let's take a look at Direct Ship in Benefits History. Select it from the navigation pane.

<no audio> Select Benefits History.

Benefits History

Toggle on the February set.

Paid

The proration displays next to the dates and Direct Shipped next to the benefit number.

The amount is as expected, 30.

Since multiple paid dates can occur with eWIC, the Paid Date no longer displays in WINNIE.

However, the status for direct shipped benefits still indicates Paid once the PFDTU is the current date or in the past.

To view the non-direct shipped items, let's click below the scroll bar.

Non-DS

And we can see the 24 cans issued to the WIC Card and for these items, the Status is issued.

Scrolling to the bottom...

Scroll Down

<no audio> Screen scrolls down to bottom of page.

First Issuance

...we can see that the first set ever issued has a PFDTU of 7/23/20.

Scrolling back to the top...

Scroll Up

<no audio> Screen scrolls up to top of page.

Last Issuance

...we can see the last issuance had a Last Date to Use (or LDTU) of 4/9/22.

Like HuBERT, these dates are reflected in our filter Start and End Dates if wanted to quickly find voided benefits.

The default filter is All. Click the Status drop-down.

Filter

And let's select Voided.

Filter 1

And click Search (or press the Enter key).

First Voided Set

Go ahead and expand the first benefit set. Click anywhere for a hint.

<hint> Toggle on the first set in the Benefit Period panel.

Void

"Voided" displays next to the benefit number, as well as the date it was voided.

This also displays in the Details card along with the staff person who voided them.

The italicized L next to the staff names indicate these are Legacy, or HuBERT records.

PPT Menu 1

Let's take a look at one more small thing.

Click the Participant Menu and select Kay Bull. Click anywhere for a hint.

<hint> Click on the participant's name or the drop-down arrow next to it in the top right corner of the page.

PPT Menu 2

<hint> Select Bull, Kay from the Other Household Members list.

Not in Cert

If we remember back to benefit issuance, Kay is not in a valid cert.

Disabled Link

For household members not in a valid cert, the Issue Benefits link on the navigation pane is disabled.

Hover

If we hover over the link...

ToolTip

...WINNIE will provide a tooltip informing us why the link is disabled. In this instance, it reads: The Issue Benefits menu option is disabled because the participant is not currently in a valid certification.

Transition 1

<no audio> Transition to blue slide.

Transition 2

<no audio> Transition to bulleted slide.

Next Month

In the next WINNIE the Scoop, we will take a first look at adjusting benefits, including an overview of the screen, void functions, and making simple changes to issued benefits.

End Slide

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Minnesota Department of Health - WIC Program 85 E 7th Place, PO BOX 64882, ST PAUL MN 55164-0882; 651-201-4404, health.wic@state.mn.us, www.health.state.mn.us; To obtain this information in a different format, call: 651-201-4404

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