Adjust Benefits 1F – Formula Scenario 6 (FPIII) - WINNIE Online Training Module

AUGUST 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It reviews adding formula and infant foods for a child who is now Food Package III in Adjust Benefits in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being August 16, 2023.

Formula Scenario 6: Food Package III Child

Scenario Overview

The following is the scenario for this module: for a child issued a standard food package, we are adding medical formula plus infant fruits and vegetables and cereal.

She has been issued prorated July benefits and benefits for August and September. Some redemption has occurred.

Scenario 1

Nessa Sary is a 1-year-old-child who is high-risk and was issued a standard child food package.

Her current set of benefits were prorated, and some foods have been redeemed, including the 36 ounces of cereal.

Medical Doc 1

We've received Medical Formula documentation for Nessa requesting that we add Boost Kid Essentials, infant cereal, and infant fruits and vegetables to her standard food package.

Her doctor is Sawyer Bones and it's approved through November 30th.

Formula Items 1

We're starting in Adjust Benefits.

Nessa needs to be food package III to receive formula.

If we were try to issue formula before selecting food package III in Health Information, the system will inform us it's not possible because formula isn't available.

FPIII 1

Go ahead and change Nessa's Food Package III status then return to Adjust Benefits. Click anywhere for a hint.

<audio – hint> Select Health Information from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

FPIII 2

<no audio> Change Nessa's Food Package III status then return to Adjust Benefits. Click anywhere for a hint.

<audio – hint> Toggle on Food Package III.

FPIII 3

<no audio> Change Nessa's Food Package III status then return to Adjust Benefits. Click anywhere for a hint.

<audio – hint> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

FPIII 4

<no audio> Change Nessa's Food Package III status then return to Adjust Benefits. Click anywhere for a hint.

<audio – hint> Select Adjust Benefits from the sidebar.

<Waiting>

<screen description – no audio> Spin icon and "Working…please wait" display.

Add Formula 1

We don't have to adjust any of the standard food items to add **formula**, so let's start there.

Go ahead and start the process of adding Boost Kid Essentials. Click for hints.

<no audio> Click here displays beside the Formula Items (since the card can also be expanded using the toggle arrow on the far right of the header).

<no audio> Start the process of adding Boost Kid Essentials 1.0 CAL formula. Click anywhere for a hint.

<audio – hint> Click on Formula Items to expand the Formula Items card.

Add Formula 2

<no audio> Start the process of adding Boost Kid Essentials formula. Click anywhere for a hint.

<audio – hint> Click the Add Formula button.

<Waiting>

<screen description – no audio> Spin icon and "Working…please wait" display.

Add Formula 3

<no audio> Start the process of adding Boost Kid Essentials formula. Click anywhere for a hint.

<audio – hint> Boost is a Medical formula. Click the Formula Type dropdown.

Add Formula 4

<no audio> Start the process of adding Boost Kid Essentials formula. Click anywhere for a hint.

<audio – hint> Medical formulas are also called Special Prescription. Select that.

Add Formula 5

<no audio> Start the process of adding Boost Kid Essentials formula. Click anywhere for a hint.

<audio – hint> Click the Food Item dropdown.

Add Formula 6

<no audio> Start the process of adding Boost Kid Essentials formula. Click anywhere for a hint.

<audio – hint> Select Boost Kid Essentials 1.0 CAL.

Add Formula 7

Let's complete the Special Prescription Item card.

Click into the End Date field and type our approval end date of 11/30/23.

Add Formula 8

<no audio> Click into the End Date field and type the approval end date of 11/30/23.

Add Formula 9

Click into the Physician's Name field, type: Sawyer Bones (comma), Dr (period), and select the reason.

Add Formula 9-11

<no audio> Click into the Physician's Name field, type: Sawyer Bones (comma), Dr., and select the reason.

Prorated 1

We need to address the Quantity.

This is a prorated benefit set that provides a three-fourths food package, which must be maintained.

Doing the math, 113 divided by 4 equals 28.25, which we always round down.

113 – 28 equals 85.

Go ahead and double-click into the Quantity, enter 85, and save our changes.

Prorated 2

<no audio> Go ahead and double-click into the Quantity, enter 85, and save our changes.

Prorated 3

<no audio> Go ahead and double-click into the Quantity, enter 85, and save our changes.

<audio – hint> Click the OK button next to the Cancel button. We don't have to click the OK in the Special Prescription Item card.

Adjust Foods 1

Now let's shift our focus to the Food Items grid.

Go ahead and collapse the Formula Items grid.

Policy 1

Policy Section 7.9 in MOM provides guidance for issuing infant cereal and infant fruits and vegetables to children.

Take a moment to read these two bullets.

<no audio> Children 1-4 years old.

<no audio> 32 oz. infant cereal **or** 36 oz. regular breakfast cereal is available for children 1-4 years of age. Issue the appropriate type of cereal based on the child's developmental abilities.

<no audio> 32 – 4 oz. jars (128 oz.) of infant pureed fruits/vegetables **may be substituted for** the fruit/vegetable food benefit for children with qualifying medical conditions that would benefit from pureed food. Medical documentation is required.

Click the button when ready to continue.

Policy 2

In general, policy helps drive how our system works, but there are some limitations, which is why when the system doesn't enforce policy, we need to.

Adding infant foods to a child's food package in Adjust Benefits is one of those instances where the system will allow us to provide foods when our policy guidelines indicate otherwise.

Adjust Foods 2

As we pointed out earlier, Nessa has already redeemed the 36 ounces of cereal.

Since we can't recover it, and per policy we can provide one OR the other, we shouldn't exchange it for the infant cereal for **this** month.

She hasn't redeemed any of her Cash-Value Benefit though.

Since we can recover these, we can add the infant fruits and vegetables.

Prorated 4

There's one other thing to mention about that.

Infant fruits and vegetables are one of our prorated food items, unlike the CVB, which is **not** prorated.

Since we do prorate them, we need to take into consideration the three fourth proration and prorate this food item as well.

Add Infant FV 1

Usually, we must recover before adding, but to show how the system works differently with these food items, were going to add our food items first, and the system will let us.

Click the Add Food Item button.

Add Infant FV 2

Click the Base Food Category dropdown.

Base Category 1

Remember, this dropdown displays all food categories Nessa could potentially be issued that she either hasn't been issued or hasn't received the maximum amount of.

Click the button to continue.

<Transition Slide>

Generally, when a Base Food Category is selected…

<screen description – no audio> Slide transitions to Food Item modal with juice selected and quantity of 2 with an "exceeds limit" validation message.

Base Category 2

…it has a maximum for that category and a combined limit for similar food items.

So, if we select the frozen concentrate juice, which is not the type of juice included in the child's default food package and is therefore an option available to us to add, any quantity we enter will be more than the maximum because we didn't recover the 64 oz containers of juice currently in her benefits first, and combining the two options exceeds the limit.

<Transition Slide>

<screen description – no audio> Slide transitions to Food Item modal with juice selected and quantity of 1with an "exceeds limit" validation message.

Base Category 3

In this way, the system "forces" us to recover before we can add a different option from the same base food category.

Click the button to continue.

<Transition Slide>

<screen description – no audio> Slide transitions back to Base Food Category modal.

Base Category 4

Unlike with infants, where the system has a combined max for medical formula plus infant foods based on age category and breastfeeding amount, for FPIII children and these food items there is no combined max.

Base Category 5

So, when we select INFANT FRUIT-VEGETABLE…go ahead…

Add Infant FV 3

…notice that our Food Item Calculator indicates there isn't anything allocated yet, and the maximum value is remaining, despite having been issued the CVB.

Let's select our food item. Go ahead.

<no audio> Click the Food Item dropdown and select the option.

Add Infant FV 4

<no audio> Click the Food Item dropdown and select the option.

Add Infant FV 5

Our second bit of system-policing is that we need to prorate our Quantity.

Simple math. 32 divided by 4 is 8.

32 minus 8 is 24.

Double-click into the Quantity field, enter our value, and click OK.

Add Infant FV 6-7

<no audio> Double-click into the Quantity field, enter our value, and click OK.

Adjust Foods 3

And although policy considers these "substitutions" for each other, the system considers them separate food categories.

Go ahead and add the infant cereal. Click for hints.

<audio – hint> Click the Add Food Item button.

Add Infant Cereal 1

<no audio> Add the infant cereal. Click anywhere for hints.

<hint – audio> Click the Base Food Category dropdown.

Add Infant Cereal 2

<no audio> Add the infant cereal. Click anywhere for hints.

<hint – audio> Select INFANT CEREAL.

Add Infant Cereal 3

Note two things: nothing is allocated yet and the maximum is remaining (despite having been issued the 36 ounces cereal), and that the quantity for food package III children is 32 ounces instead of 24.

Continue adding the cereal.

<no audio> Add the infant cereal. Click anywhere for hints.

<hint – audio> Click the Food Item dropdown.

Add Infant Cereal 4

<no audio> Add the infant cereal. Click anywhere for hints.

<hint – audio> Select Infant Cereal (ounces plain dry).

Add Infant Cereal 5

<no audio> Add the infant cereal. Click anywhere for hints.

<hint – audio> Click the OK button.

Delete Infant Cereal 1

Again, although policy indicates we should issue one **OR** the other, the system considers them separate food categories and allows issuance of both.

When adding infant foods to an existing child's food package, it is very easy to over-issue, and we have to be smarter than the machine.

We can't issue the Infant Cereal for this month because she has already redeemed the 36 ounces of cereal.

So, we need to delete the infant cereal we just added.

We delete a food item we added by zeroing out its Additional Quantity.

Go ahead and do that, double-clicking and typing the value. Click for hints.

<audio – hint> Double-click into the Additional Quantity field in the Infant Cereal row.

Delete Infant Cereal 2

<no audio> Zero out the Additional Quantity of infant cereal, double-clicking and typing the value. Click anywhere for hints.

<audio – hint> We are deleting infant cereal by entering a value of 0. Type 0.

 Delete Infant Cereal 3

<no audio> Zero out the Additional Quantity of infant cereal, double-clicking and typing the value. Click anywhere for hints.

<audio – hint> Press the Tab key or click somewhere on the page.

Delete Infant Cereal 4

Although the row remains, now that the value is 0, the WIC Processor will not add it, and it has basically been deleted.

Recover CVB 1

Our next opportunity to over-issue is the CVB.

Which is why, as we move forward, we will always, as best practice dictates, recover our food items first before adding the new food items.

Recover CVB 2

Since Redemption is zero, we can recover the CVB and keep our added infant fruits and vegetables for this month.

If there were any redemption, adding the infant fruit and vegetables would have to wait until next month as well.

Go ahead and recover the CVB, double-clicking and typing the value. Click for hints.

<audio – hint> Double-click into the Recovered field in the dollars WIC-allowed Fruits and Vegetables row.

Recover CVB 3

<no audio> Recover the CVB, double-clicking and typing the value. Click anywhere for hints.

<audio – hint> We are recovering the whole CVB by entering a value of 10. Type 10.

Recover CVB 4

<no audio> Recover the CVB, double-clicking and typing the value. Click anywhere for hints.

<audio – hint> Press the Tab key or click somewhere on the page.

Void 1

That's a lot of adjustments and it might make more sense to void the future benefits and create a new food prescription instead of using the Update Future Months function.

Let's do that.

Collapse the current benefit set's card, void the future benefit sets, collapse each future set's card, and communicate with the Processor.

Void 2

<no audio> Collapse the current benefit set's card, void the future benefit sets, collapse each future set's card, and communicate with the WIC Processor.

Collapse 1-2

<no audio> Collapse the current benefit set's card, void the future benefit sets, collapse each future set's card, and communicate with the WIC Processor.

Send Data 1

<no audio> Collapse the current benefit set's card, void the future benefit sets, collapse each future set's card, and communicate with the WIC Processor.

<Waiting>

<screen description – no audio> Spin icon and "Working…please wait" display.

<Waiting>

<screen description – no audio> Spin icon and "Working…please wait" display.

Collapse 3

Review the adjusted benefit set and collapse the card to verify the green banner.

<Transition Slide>

Instead of reviewing all the cards in Benefits History, we'll just look at a quick summary.

<screen description – no audio> Slide transitions to Benefits History Overview.

Benefits History 1

Review and click the button when ready to continue.

Benefits History 2

<no audio> Review and click the button when ready to continue.

Food Prescription 1

What do we always do after adjusting benefits? Go ahead. Click for a hint.

<audio – hint> We must always verify the food prescriptions. Select Food Prescription from the sidebar.

<Waiting>

<screen description – no audio> Spin icon and "Working…please wait" display.

Food Prescription 2

One food prescription was created for the adjusted July benefits with an Effective Date that matches the FDTU of that set.

Will we have to create a new food prescription, or can we use this one?

Select the correct answer:

NO. We will need to create a new food prescription.

YES. We will be able to use this food prescription.

Correct/Incorrect. The food prescription will contain prorated quantities and incorrect food items. We must create a new one.

Food Prescription 3

Click the Effective Date to expand the food prescription created when we adjusted the benefits.

<audio – hint> Expand the August 16 food prescription.

Food Prescription 4

Of note in this food prescription is the prorated quantity of 85 for the Boost formula, the 36 ounces of cereal instead of infant cereal, and the prorated 24 jars of infant fruits and vegetables.

Since our focus right now is Adjust Benefits, we are not going to spend time creating a new food prescription.

But one definitely must be created with an Effective Date of their next PFDTU.

After that, we must reissue the August and September benefits we voided.

<Transition Slide>

<screen description – no audio> Slide transitions to Knowledge Test.

Test Your Knowledge

T/F Q#1

True or false?

When replacing the CVB with infant foods, the system will ensure we don't over-issue.

Answer #1

The answer is False.

Because the infant food items have their own base food category, there is no combined maximum when adding them to a food package that already has a CVB. The system will allow us issue both the CVB and infant fruits and vegetables, which would be an over-issuance.

Multiple Choice Q#2

Which statement is true? When adding infant foods to a Food Package III child's existing benefits…

A. The system will force us to recover the 36 ounces cereal and CVB before allowing us to add the infant cereal and infant foods.

B. When we click the Send eWIC Data button, the system has validations to ensure we don't over-issue.

C. If the benefits were prorated, we don't have to prorate the infant foods because the CVB that we are recovering isn't prorated.

D. We should issue whatever the system allows us to issue.

E. None of these are true.

Answer #2

The answer is E.

None of these statements are true.

Explanation for Other Answers:

A – The system allows us to add infant cereal and foods without recovering first.

B – There are no food limit validations that occur when clicking the Send eWIC Data button. All validations occur when recovering, adding, and adjusting the food items.

C – Although we don't prorate the CVB, we do prorate the infant foods, and proration should be maintained when adding them to the benefits.

D – The system will allow us to issue more than is appropriate. We have to be smarter than the machine!

End

End Slide

Thank you for reviewing this WINNIE online training module presented by the Minnesota Department of Health WIC Program.

If you have any feedback, comments, or questions about the information provided, please submit the WINNIE Questions for the State WIC Office form.

Minnesota Department of Health - WIC Program, 625 Robert St N, PO BOX 64975, ST PAUL MN 55164-0975; 1-800-657-3942, health.wic@state.mn.us, www.health.state.mn.us; to obtain this information in a different format, call: 1-800-657-3942.

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