

Adjust Benefits 1G – Direct Ship Scenario 1 WINNIE Online Training Module

AUGUST 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is a review of how to issue by Direct Ship in Adjust Benefits when original issuance is to the WIC Card in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being August 18, 2023.

Direct Ship Scenario 1

Scenario Overview

The following is the scenario for this module: an infant was issued medical formula to the WIC Card and her foster mom has so far only been able to find two cans in stores near her, which she purchased.

So, we need to direct ship the rest of the cans on her current benefits for this month.

Scenario 1

Cara Mell is a 3-month-old Food Package III infant for whom we are going to direct ship benefits.

We've talked with the State Office, and they've shipped us the formula to provide to her foster mother for this month and will work with her preferred store for future months.

We have to use Adjust Benefits since two cans were purchased.

Cara is food package III. What do we need to do before adjusting benefits? Go ahead. Click anywhere for a hint.

<no audio> What do we need to do for a Food Package III infant before opening Adjust Benefits? Click anywhere for a hint.

<audio – hint> We have to update the Food Package III Verified Date. Select Health Information from the sidebar.

Health Information 1

<no audio> What do we need to do for a Food Package III infant before opening Adjust Benefits? Click anywhere for a hint.

<audio – hint> Click the calendar control in the Food Package III Verified Date field.

Health Information 2

<no audio> What do we need to do for a Food Package III infant before opening Adjust Benefits? Click anywhere for a hint.

<audio – hint> Select today’s date, August 18th.

Health Information 3

<no audio> What do we need to do for a Food Package III infant before opening Adjust Benefits? Click anywhere for a hint.

<audio – hint> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

Health Information 4

Go ahead and open Adjust Benefits.

<Waiting>

<screen description – no audio> Spin icon and “Working...please wait” display.

Direct Ship 1

As we mentioned when we first reviewed the formula grid, if a formula can be direct shipped, the Direct Ship toggle becomes enabled when the Additional Quantity amount is greater than 0.

Direct Ship 1A

There are two steps to direct shipping the same formula issued to the WIC Card.

Step 1, we must recover the cans of formula from the card.

Step 2, we must then add that same number of cans. Adding cans enables the direct ship toggle.

We know how to do that. Go ahead. Double-clicking and typing the values. Click anywhere for hints.

<no audio> Recover and add the cans of formula. Click anywhere for a hint.

<audio – hint> Double-click into the Recovered field in the Formula cans row.

Direct Ship 2

no audio> Recover and add the cans of formula. Click anywhere for a hint.

<audio – hint> We are recovering the HH EBT Balance on the WIC Card. Type 7.

Direct Ship 3

no audio> Recover and add the cans of formula. Click anywhere for a hint.

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

Direct Ship 4

<no audio> Recover and add the cans of formula. Click anywhere for a hint.

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

Direct Ship 5

no audio> Recover and add the cans of formula. Click anywhere for a hint.

<audio – hint> We are adding the same number of cans we recovered. Type 7.

Direct Ship 6

no audio> Recover and add the cans of formula. Click anywhere for a hint.

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

Direct Ship 7

Additional Quantity greater than 0, Direct Ship toggle enabled.

Go ahead and toggle it on.

<no audio> Toggle on Direct Ship,

Direct Ship 8

Just like in Issue Benefits, the Direct Shipped Items card opens.

It opens within the benefit set's card directly below the Formula and Food Item grids.

We should already be familiar with this card, so go ahead and complete it, starting with the Ship To dropdown. Click anywhere for a hint.

<audio – hint> Click the Ship To dropdown.

Direct Ship 9

<no audio> Complete the Direct Shipped Items card, starting with the Ship To dropdown. Click anywhere for a hint.

<audio – hint> We should always select In Stock. Select In Stock.

Direct Ship 10

<no audio> Complete the Direct Shipped Items card, starting with the Ship To dropdown. Click anywhere for a hint.

<audio – hint> Tab or click into the Direct Ship Quantity field.

Direct Ship 11

<no audio> Complete the Direct Shipped Items card, starting with the Ship To dropdown. Click anywhere for a hint.

<audio – hint> We are direct shipping the Total Quantity of cans. Type 7.

Direct Ship 12

The is all there is to it.

The future sets are going to remain issued to the WIC Card and we don't have to do anything with them.

This time let's click below the scroll bar and communicate our change.

Send Data 1

<no audio> Communicate this change to 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.

Direct Ship 13

Our Formula Items grid now displays 2 for the EBT Amount Issued and 7 for the DS Amount Issued.

Our grid also now indicates all 9 cans are redeemed since the PFDTU of the direct shipped benefits is in the past.

Click below the scroll bar to verify our green banner then open Benefits History.

Benefits History 1

<no audio> Click below the scroll bar then open Benefits History.

<Waiting>

<screen description – no audio> Spin icon displays.

Benefits History 2

Go ahead and toggle on the August benefit sets.

<no audio> Toggle on this set.

Benefits History 3

<no audio> Toggle on this set.

Benefits History 4

We have our direct shipped quantity issued today and its status is Paid.

Collapse this card.

<no audio> Click to collapse this card,

Benefits History 5

And 7 recovered in the original set.

In general, we don't have to review Benefits History after adjusting benefits, we're just doing that because this is a training module.

But, where **do** we always have to go 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 1

We have a food prescription created with an Effective Date of today’s FDTU and a future food prescription that was left as-is since its Effective Date is before the last LDTU of the issued sets, which is in November.

Let’s take a look at the prescription added for today first. Go ahead and expand it.

<no audio> Expand the 8/18/23 food prescription.

Food Prescription 2

Even though we only direct shipped 7 cans, the benefit set was an issued amount of 9, which is reflected in the Food Prescription.

Go ahead and expand the September food prescription.

<no audio> Expand the 9/7/23 food prescription.

Food Prescription 3

This is the food prescription for her 4-5 month age category.

Due to the rules that govern food prescriptions after adjusting benefits, all of the future age categories, which are the 6-8, 9-11, and possibly the child food package, have been deleted (if they existed).

In general, best practice is to re-create these deleted food prescriptions.

Test Your Knowledge

Multiple Choice Q#1

What are the two steps we have to complete to be able to direct ship the same formula that was originally issued to the WIC Card?

- A. Return the quantity redeemed then add that same quantity.
- B. Recover the quantity in the Household EBT Balance then click the Add Formula Item button to re-add the formula again.
- C. Recover the quantity in the Household EBT Balance then add that same quantity.
- D. Recover the quantity redeemed then add that same quantity.
- E. Return the quantity in the Household EBT Balance then click the Add Formula Item button to re-add the formula again.

Answer #1

The answer is C.

We must first recover the quantity in the Household EBT Balance then enter that same amount in the Additional Quantity field. This will enable the Direct Ship toggle.

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.

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