

Change Household ID 1B – WINNIE Online Training Module

JULY 2024

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is a continued overview of how to change the Household ID in WINNIE, the MN WIC Information System.

Date 1

All dates in this module are based on today's date being July 1, 2024.

<Transition Slide>

<screen description - no audio> Slide transitions to date page then to Search page with Erde household.

Incomplete Change Household ID

Interrupt 1

In the last module, we started the Change Household ID for Shep Erde, but we weren't able to complete it.

Aida Lott, Buzz and Shep's new foster mom, has returned the following week so that we can finish moving the boys to a new household and issuing a WIC Card for Aida to use.

Double-click to open Buzz's folder.

<no audio> Double-click on Buzz's card to open his Participant Folder.

Interrupt 2

Unlike certs and MCAs, **all** household members' folders are locked when the Change Household ID attempt is in progress for another member.

Click OK.

<no audio> Click the OK button.

<Waiting>

<screen description – no audio> Working...please wait and spin icon display.

Interrupt 3

Go ahead and open Shep's folder.

<audio – hint> Click the Participant Menu.

Interrupt 4

Notice the Change Household ID option is disabled.

Go ahead and hover over Change Household ID to view the tool tip then continue opening Shep's folder.

TOOLTIP: The Change Household ID menu option is disabled because a household ID change is currently in progress for Erde, Shep.

<no audio> Open Shep's folder.

Interrupt 5

<no audio> Open Shep's folder.

Interrupt 6

Go ahead and collapse the Clinic Actions menu.

Interrupt 7

At the bottom of our sidebar, is the Change Household ID menu with two options: Resume Change Household ID or Remove Incomplete Change Household ID.

If we select Remove...go ahead...

<no audio> Select Remove Incomplete Change Household ID from the sidebar.

Remove CHHID 1

A message displays informing us that none of the information already entered will be kept.

Remember, everything is temporarily saved until we complete it.

If we don't complete it, nothing is saved.

We're going to complete it. Click the No button.

Interrupt 8

This time, select Resume Change Household ID from the sidebar.

Interrupt 9

It re-opens the Create New Household page, and we still have our completed information and checkmarks.

Let's continue by adding the new WIC Card.

Select Review New Household's EBT HH Demographics from the sidebar.

<Waiting>

<screen description – no audio> Working...please wait and spin icon display.

Review New Household Continued – Add WIC Card

Review New Cont. 1

We don't have a card reader, so we'll manually enter the card number, which is 6107279300000444 (that's 5 zeroes).

Go ahead and assign the card.

<no audio> Assign the WIC Card.

<audio – hint> Click the Authorized Rep row to select it.

Review New Cont. 2-4

<no audio> We don't have a card reader, so we'll manually enter the card number, which is 6107279300000444 (that's 5 zeroes).

<no audio> Assign the WIC Card.

Review New Cont. 5

SWIPe is on because we will need to collect a signature for the card.

Click Save then click through capturing the signature.

Capture Signature 1

<no audio> Click Save then click through capturing the signature.

Capture Signature 2

<no audio> wait...

Capture Signature 3-4

<no audio> Click Save then click through capturing the signature.

<Waiting>

<screen description – no audio> Spin icon displays.

Adjust Benefits

Adjust Benefits 1

Next, select Adjust Benefits from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Adjust Benefits 2

If the participant doesn't have any current benefits, a message displays telling us that we can't adjust benefits because there aren't any current benefits to adjust.

Since it can't open the page without benefits, it returns to the previous page, we get the checkmark, and the last requirement is enabled.

<Transition Slide>

However, Shep has current benefits, so the Adjust Benefits page opens.

<screen description – no audio> Slide transitions back to Adjust Benefits with benefits listed.

Adjust Benefits 3

We use Adjust Benefits to move foods issued to Shep for this month from his original household's Electronic Benefit Account to his new household's Electronic Benefit Account.

The Modify Current Benefit Set grid lists all the foods issued to Shep for this month that have not been previously recovered or voided.

Adjust Benefits 4

The format of the food item is the same as we saw in the Aggregated Issuance modal and the last column in the grid is the Unit of Measure.

The second column is the original amount for this month followed by how much is still left in the household account.

The Remove column is the amount the system is suggesting we take from his original household's account and put in his new household's account.

Adjust Benefits 5

The system automatically suggests the issued amount except, as we see here with whole milk, when some of the food item has already been bought and there is less left in the Household Balance than was originally Issued.

Whichever is lower, Household Balance or Issued, that amount is the maximum we can enter into the Remove field.

Adjust Benefits 6

For instance, if we increase the whole milk above the Household Balance, a validation will display that reads: This value cannot be greater than the Issued or HH Balance.

Same goes if we were to try to increase the suggested Remove amount to a value higher than what was issued.

Click the button to continue.

<Transition Slide>

Returning to the originally suggested remove amounts...

<screen description – no audio> Slide transitions back to Adjust Benefits with benefits and original Remove amounts listed.

Adjust Benefits 7

There are two toggles beneath the grid.

The default is to Reissue Removed Quantity or recover the suggested removed amounts from the original household's account and issue it to Shep's new household account.

We're going to do that for now.

The Reissue Full Set toggle and Package Size dropdown work together, and we'll look at them in a couple of minutes.

Again, we aren't making any changes, so we just click Save.

<no audio> Click the Save button.

Complete Change Household ID

Complete CHHID 1

Click the last requirement.

<no audio> Select Complete Household ID Change from the sidebar.

Complete CHHID 2

<waiting><screen description – no audio> Spin icon displays.

The Aggregated Issuance modal displays since we are reissuing Shep's current set of benefits with a Printed First Date to Use (or PFDTU) of today and with the same Last Date to Use.

These are being issued to his new household's account.

Go ahead and click the Send eWIC Data button to issue then close the modal.

Complete CHHID 3

<no audio> Click the Send eWIC Data button to issue then close the modal.

<Waiting>

<screen description – no audio> Spin icon displays.

Complete CHHID 4

This message is letting us know that any future benefits, Direct Shipped or otherwise, were voided and that we will need to go to the Issue Benefits page to reissue the future benefits.

Click OK.

<no audio> Click the OK button.

Complete CHHID 5

The last message lets us know we're done.

Click OK.

<no audio> Click the OK button.

Complete CHHID 6

The new Household ID is now assigned so we're going to jot that down and save it for later.

Let's take a quick look at Benefits History.

Select it from the sidebar.

<no audio> Select Benefits History from the sidebar.

Benefits History after Change HHID

Benefits History 1

First, the future benefits were voided. Let's verify.

Click on the August 11 benefit set.

Benefits History 2

As indicated, all future benefits have been voided.

Do the same for the July 11 benefit set.

<no audio> Click or toggle on the 7/11/2024 benefit set.

Benefits History 3

Collapse the August 11 set.

<no audio> Collapse the 8/11/24 set.

Benefits History 4

Ditto for July's set.

Next, open the July 1 set that we just reissued...

<no audio> Click or toggle on the 7/1/2024 benefit set.

Benefits History 5

...and collapse the July 11 set.

<no audio> Collapse the 7/11/24 set.

Benefits History 6

We need more real estate. Let's also collapse the filter at the top of the page.

Benefits History 7

As we'd expect all food items were issued.

Last one. Toggle on the June 11 benefits.

Benefits History 8

And, collapse the July 1 benefits.

Benefits History 9

Not quite as expected?

Some of Shep's benefits are still issued and not recovered.

But all of the food items, and their total amounts, should have been removed.

Well, the randomness of the WIC Processor, which we saw in Transaction History, struck again.

Let's take a look at Buzz's Benefits History.

Remember, he is in another household, so we have to close Shep's folder and open Buzz's.

Go ahead and close Shep's folder.

<no audio> Close Shep's folder.

<audio – hint> Select Search on the sidebar.

End Slide 1

We'll continue this household ID change in the next module.

Click the button to continue.

Knowledge Test

True/False Q#1

True or False?

If we remove an incomplete Change Household ID, any changes we've made will be deleted. This includes demographic information, deactivated cards, assigned cards, etc.

Answer #1

The answer is true.

None of the changes we make while in Change Household ID mode are saved to the database or sent to the WIC Processor until the change has been completed. If we remove a Change Household ID attempt, **all** of the information we entered will be deleted.

True/False Q#2

True or False?

As best practice, we should write an alert to inform other staff members if we are unable to complete the Change Household ID on the same date as it is started.

Answer #2

The answer is False.

We cannot write an alert because everything in the folder, and all members' folders, are completely locked when a Change Household ID attempt is in progress.

However, the system displays a message to inform the next staff person that a Household ID change is in progress when any of the household member's folders are opened.

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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