

Change Household ID 2B – WINNIE Online Training Module

JULY 2024 (REV. 1 – 9/2024)

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 when direct shipped formula has been issued for the current benefit set, in WINNIE, the MN WIC Information System.

Date 1

All dates in this module are based on today's date being July 16, 2024.

<Transition Slide>

<screen description – no audio> Slide transitions to Adjust Benefits page in Change Household ID mode for Senna Pede.

Scenario

Scenario 1

In this module, we are continuing Senna Pede's Household ID change on the Adjust Benefits page.

Adjust Benefits in Change Household ID

Adjust Benefits DS 1

The HH Balance column shows us that all of the formula and foods issued to the household account have been purchased since their balance is 0.

Direct Shipped formulas always display a 0 in the HH Balance column since this column only reflects the EBT balance or what's left in the household account.

Unlike the actual Adjust Benefits page, Change Household ID doesn't have a column to return direct-shipped formula and as we'll see in a minute, the system automatically returns all direct

shipped formula, which means if it isn't all returned we'll have to document in a note what, if anything, was actually returned.

Since Aida was unable to get any of the formula or infant foods from the family, we are going to reissue the full set.

Go ahead and toggle it on.

<no audio> Toggle on Reissue Full Set.

Adjust Benefits DS 2

A full package size is appropriate since none of the food items are a decreased amount, so we know they weren't prorated.

Click the Save button.

<Waiting>

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

Automatic Direct Ship by WINNIE

Auto Direct Ship 1

WINNIE also automatically direct ships the formula that was originally direct shipped.

There are a few things we can do to proactively address this.

One of these things is if we are issuing exactly the same amount by direct ship, in this case 2 cans of Reguline, we can edit the food prescription and decrease the amount of formula by the direct ship amount.

So, in this Change Household ID Food Prescription we could delete the Reguline.

If we were to issue this food package without the Reguline, WINNIE would still automatically direct ship the 2 cans of Reguline.

Auto Direct Ship 2

We aren't going to make this change so that we can look at what we have to do if we forget that the system automatically direct ships any direct shipped formula.

Since we didn't make any changes, we can just click Cancel.

<no audio> Click the Cancel button.

Auto Direct Ship 3

We're done with the household ID changes.

Select Complete Household ID Change from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Issue Benefits

Issue Benefits 1

We always have the option to direct ship when issuing formula.

In this case, we've forgotten that the system automatically direct ships the formula so were going to direct ship the 2 cans of Reguline, which were returned unopened by another family, and we have on-hand at our clinic site. Click anywhere for a hint.

<no audio> Direct ship 2 cans of Reguline. Click anywhere for a hint.

<audio – hint> Toggle On Direct Ship for Enfamil Reguline.

Issue Benefits 2

<no audio> Direct ship 2 cans of Reguline. Click anywhere for a hint.

<audio – hint> Click the Ship To dropdown.

Issue Benefits 3

<no audio> Direct ship 2 cans of Reguline. Click anywhere for a hint.

<audio – hint> Select In Stock

Issue Benefits 4

<no audio> Direct ship 2 cans of Reguline. Click anywhere for a hint.

<audio – hint> Click into or tab to the Direct Ship Quantity field.

Issue Benefits 5

<no audio> Direct ship 2 cans of Reguline. Click anywhere for a hint.

<audio – hint> The quantity is 2. Type 2.

Issue Benefits 6

<no audio> Direct ship 2 cans of Reguline. Click anywhere for a hint.

<audio – hint> Click the Save button.

Issue Benefits 7

Review the food items being issued and then Send eWIC Data.

Complete Change Household ID

Issue Benefits 8

Go ahead and finish Change Household ID.

<no audio> Complete Change Household ID.

Complete CHHID 1

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

Complete CHHID 2

Senna's new household displays.

Go ahead and open Benefits History.

<no audio> Select Benefits History from the sidebar.

Benefits History after Change HH ID

Benefits History After 1

And collapse the filter card.

Benefits History After 2

We know the August and September benefits were voided.

So, let's just look at the July issuances.

Toggle on the July 8th set.

<no audio> Click or toggle on the July 8 benefit set.

Benefits History After 3

As we talked about earlier, WINNIE automatically returns the direct shipped formula.

Since no physical cans of unopened formula was actually returned, we need to document this in a note, which we'll do in a couple of minutes.

The original formula and foods are still issued since nothing was recovered from the **original household's** card.

Now let's look at the July 16th set.

<no audio> Click or toggle on the July 16 benefit set.

Benefits History After 4

So far, this looks OK.

The AR and foods were issued and the 2 cans of Reguline were direct shipped.

But let's click below the scroll bar.

Benefits History After 5

As we mentioned before, WINNIE automatically reissued the direct shipped formula.

Since we didn't decrease the food prescription by the 2 cans being direct shipped, which may be appropriate considering we might not have 2 more cans available to direct ship, we run the risk of what appears like over-issuing.

So, our next step is to Adjust Benefits and **return** the 2 extra direct shipped cans of formula.

Select Adjust Benefits from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Adjust Benefits in Participant Folder

Adjust Benefits PF 1

The Available column is telling us that we've overissued and need to decrease either formula by 2 cans.

Since it appears that 2 extra cans were direct shipped, we are **returning** those 2 cans to correct the issuance record.

Go ahead and return 2 cans of direct shipped Reguline formula.

Double-click in the Return field, type 2, and Tab.

Adjust Benefits PF 2-3

<no audio> Double-click in the Return field, type 2, and Tab.

<Waiting>

<screen description – no audio> Spin icon displays.

Adjust Benefits PF 4

The Available column no longer has negative values and is 0.

We're good to go.

Click the Send eWIC Data button.

<Waiting>

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

<Waiting>

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

Benefits History After 6

OK. Let's make sure Benefits History is accurately reflecting our issuance.

<no audio> Select Benefits History from the sidebar.

Benefits History After 7

Collapse the filter again.

Benefits History After 8

Toggle on the July 16th then July 8th sets again.

<no audio> Click or toggle on the July 16 benefit set.

Benefits History After 9

<no audio> Click or toggle on the July 8 benefit set.

Benefits History After 10

And click below the scroll bar.

Benefits History After 11

We have one set of 2 cans direct shipped Reguline still issued.

And one set that has been returned.

So far, this looks OK.

Click below the scroll bar again.

Document Returned Cans

Document Return 1

Ah. That's right. We still need to document how many cans were actually returned during Change Household ID, in this case none, in a general note with Benefit Issuance as the subject.

Go ahead and get us started.

<no audio> Add a General Note with the subject of Benefit Issuance.

<Waiting>

<screen description – no audio> Spin icon displays.

Document Return 2-5

<no audio> Add a General Note with the subject of Benefit Issuance.

Document Return 5A

Click inside the Note Text field and we'll type a quick note.

Document Return 6

We'll document what was actually returned, nothing, and why we're writing the note.

Go ahead and save the note.

<no audio> Click the Save button.

NOTE text: 2 cans Reguline direct shipped on 7/10 were NOT returned. WINNIE show returned due to HHID change.

<Waiting>

<screen description – no audio> Spin icon displays.

Food Prescription after Adjust Benefits

Food Prescription 1

Following best practice, we always verify the food prescription after adjusting benefits.

Go ahead and open the Food Prescription page.

<no audio> Select Food Prescription from the sidebar.

Food Prescription 2

We have a food prescription created today.

However, notice that the 9-month future food prescription with an Effective Date after the last issued set's Last Date to Use, was not deleted, as it would have been if we had used Adjust Benefits in the Participant Folder.

Adjust Benefits in Change Household ID, and how it impacts the Food Prescriptions, does not work like Adjust Benefits in the participant folder.

The only change is that it creates a food prescription with an effective date of today listing the items issued.

Let's take a look at that.

Go ahead and click the Toggle Accordion icon on the right to expand the food prescription.

Food Prescription 3

According to the alert when we opened Senna's folder, the two cans of Reguline were to assist with introducing the new formula.

So, it isn't what we want to issue for her August and September sets.

Let's add a new food prescription with an Effective Date of her August PFDTU, which is the 8th, for just Enfamil AR.

Go ahead. Follow any cues that display. Click anywhere for a hint.

<no audio> Add a food prescription with an Effective Date of August 8 for Enfamil A.R. Click anywhere for a hint.

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

Food Prescription 4

Use the calendar icon.

<no audio> Add a food prescription with an Effective Date of August 8 for Enfamil A.R. Click anywhere for a hint.

Food Prescription 5

<no audio> Add a food prescription with an Effective Date of August 8 for Enfamil A.R. Click anywhere for a hint.

<audio hint> Click the right arrow.

Food Prescription 6

<no audio> Add a food prescription with an Effective Date of August 8 for Enfamil A.R. Click anywhere for a hint.

<audio hint> Select August 8.

Food Prescription 7

<no audio> Add a food prescription with an Effective Date of August 8 for Enfamil A.R. Click anywhere for a hint.

<audio hint> Click the Use Default button.

Food Prescription 8

<no audio> Add a food prescription with an Effective Date of August 8 for Enfamil A.R. Click anywhere for a hint.

<audio – hint> Click the Food Item dropdown.

Food Prescription 9

<no audio> Add a food prescription with an Effective Date of August 8 for Enfamil A.R. Click anywhere for a hint.

<audio – hint> Select Enfamil A.R.

Food Prescription 10

<no audio> Add a food prescription with an Effective Date of August 8 for Enfamil A.R. Click anywhere for a hint.

<audio – hint> Click the Save button.

Issue Benefits

Issue Benefits 1

Next step is to reissue the August and September benefits.

Open the Issue Benefits page.

<no audio> Select Issue Benefits from the sidebar.

<Waiting>

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

Issue Benefits 2

Go ahead and issue benefits for August and September. Click anywhere for a hint.

<audio – hint> Toggle off the October benefit set.

Issue Benefits 3

<no audio> Issue benefits for August and September. Click anywhere for a hint.

<audio – hint> Click the Issue Benefits button.

Issue Benefits 4

<no audio> Issue benefits for August and September. Click anywhere for a hint.

<audio – hint> Click the Send eWIC Data button.

<Waiting>

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

Issue Benefits 5

<no audio> Issue benefits for August and September. Click anywhere for a hint.

<audio – hint> Click the Close button.

<Waiting>

<screen description – no audio> Spin icon displays.

View Household ID Change History

View CHHID History 1

Our last step is to write an alert to immediately inform the next staff person that Senna is in foster care and as a reminder to ask if there have been any changes to her foster care status.

Last time, we included the original household ID, which isn't a bad idea, so let's do it again.

Where do we find Senna's original household ID?

Go ahead. Click anywhere for a hint.

<no audio> Where do we find Senna's original household ID? Click anywhere for a hint.

<audio – hint> Click the Participant Menu.

View CHHID History 2

<no audio> Where do we find Senna’s original household ID? Click anywhere for a hint.

<audio – hint> Select View Household ID Change History.

View CHHID History 3

OK. We’ve jotted down Senna’s original Household ID.

Click the Close button.

Create Priority Alert

Alert 1

Let’s create a priority alert with the Subject of Custody.

Go ahead and get us started. Click anywhere for a hint.

<no audio> Create a Priority alert with the Subject of Custody. Click anywhere for a hint.

<audio – hint> Select Manage Alerts from the sidebar.

Alert 2

<no audio> Create a Priority alert with the Subject of Custody. Click anywhere for a hint.

<audio – hint> Click the Add button.

Alert 3

<no audio> Create a Priority alert with the Subject of Custody. Click anywhere for a hint.

<audio – hint> Toggle on Priority.

Alert 4

<no audio> Create a Priority alert with the Subject of Custody. Click anywhere for a hint.

<audio – hint> Click the Subject dropdown.

Alert 5

<no audio> Create a Priority alert with the Subject of Custody. Click anywhere for a hint.

<audio – hint> Select Custody.

Alert 6

Click into the Alert Text field and we'll quickly type an alert.

Alert 7

<screen description – no audio> Alert text: Both Buzz and Shep are in foster care. Please verify their situation has not changed. Mom's HHID, and their original HHID, is 13700215.

We'll add Senna's original ID just as a reference, for when she can be returned to her mom's household.

Alert 8

And save the alert.

<no audio> Click the Save button.

End Slide 1

This concludes our review of Change Household ID.

Click the button to continue.

Knowledge Test

True/False Q#1

True or false?

WINNIE will always direct ship 2 cans of formula when benefits are reissued to an infant while changing the Household ID.

Answer #1

The answer is False.

WINNIE only direct ships the same amount of formula that was originally direct shipped when an infant is reissued formula while changing the infant's Household ID. If formula wasn't direct shipped for the current set of benefits, the system does not direct ship any formula.

True/False Q#2

True or False?

WINNIE will always automatically return all direct shipped formula when formula is reissued while changing Household ID.

Answer #2

The answer is True.

Any formula that was originally direct shipped for the current set of benefits will be automatically returned by the system when formula is reissued while changing the Household ID.

End

End Slide 2

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.

Revisions

9/17/24 – Corrected Adjust Benefits slides that were showing an incorrect EBT HH Balance (due to copy/paste error when creating the slide).

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