

Issue Benefits 1C – Overview - WINNIE Online Training Module

SEPTEMBER 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It's a continued overview of issuing food benefits in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being September 20, 2023.

<Transition Slide>

<screen description – no audio> Slide transitions to Search page.

Overview 1

We are continuing with Issue Benefits and the Lee family, for whom all messages have been resolved.

Issuance Details 1

Household members that are toggled on will be issued benefits.

Issuance Details 2

Benefit sets that are toggled on will be issued.

Issuance Details 3

WINNIE will suggest the same months of benefits for all household members in order to keep all of their cycles in sync and their last Last Date to use LDTU the same.

To see this in action, let's first select Ashe from the Participant Menu then select Issuance Frequency.

Issuance Frequency 1

<no audio> select Ashe from the Participant Menu then select Issuance Frequency.

<Waiting>

<screen description – no audio> Spin icon displays.

Issuance Frequency 2-3

<no audio> select Ashe from the Participant Menu then select Issuance Frequency.

Issuance Frequency 4

We reviewed this earlier when reviewing functions in the Participant Menu.

Its primary use is as a long-term change from tri-monthly benefit issuance.

It's participant-level, so let's change Ashe to Monthly, and see how it affects our suggested benefits. Click anywhere for hints.

<no audio> Change Ashe to Monthly. Click anywhere for hints.

<audio – hint> Click the dropdown.

Issuance Frequency 5

<no audio> Change Ashe to Monthly. Click anywhere for hints.

<audio – hint> Select Monthly.

Issuance Frequency 6

<no audio> Change Ashe to Monthly. Click anywhere for hints.

<audio – hint> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

Issuance Frequency 7

Let's click below the scroll bar to view the entire Issuance Details.

Issuance Frequency 8

Ashe now has only 1 month suggested.

In an effort to keep everyone in sync with Ashe, the system toggled off the October and November benefits for Norma and Merry along with Abe’s benefits.

The toggles for each member work together.

Toggle on the November benefit for Norma.

Toggle 1

Both October and November toggle on since we can’t skip issuing a month of benefits.

Toggling off the first set...go ahead and toggle off September for Norma...

Toggle 2

Toggles off all sets, including the main toggle.

And toggling on the main toggle, go ahead and toggle it on for Norma...

Toggle 3

Toggles on all sets.

Best practice, in general, is to issue the same months of benefits to everyone.

The exception being if a member is receiving fewer sets because they are becoming categorically ineligible and cannot receive any more benefits.

WINNIE will still suggest based on the member receiving the fewest sets.

<Transition Slide>

We’re going to transition back to where we started, in Abe’s folder and all sets suggested.

<screen description – no audio> Slide transitions to Issue Benefits page.

Proration 1

Benefits issued late, or after the PFDTU of the benefit cycle, are denoted by angle brackets around the PFDTU followed by the FDTU or issued date and the LDTU.

The late benefits may be prorated, and the amount of the proration displays in square brackets to the right of the dates.

<Transition Slide>

<screen description – no audio> Slide transitions to topic slide.

Proration 2

Proration is a reduction in certain food items due to there being fewer days left in the cycle to use the benefits before the next set begins.

Proration 3

Proration is based on the number of days between the FDTU and LDTU; the closer the date is to their next set of benefits starting, the more the food package is prorated.

Proration 4

For women and children, currently only the quantity of milk is decreased.

If they are Food Package III, the formula is also prorated.

If there are only 1 to 7 days left, they receive a quarter package.

Proration 5

If there are 8 to 15 days left in their cycle, they receive a half-package.

Proration 6

If there are 16 to 23 days left in the cycle, they receive a three-quarters package.

Proration 7

If there are 24 or more days left in the cycle, there is no proration, and they receive a full package.

Proration 8

For infants, formula, infant fruits and vegetables and infant meats are decreased.

However, proration for infants starts at 15 days and is never less than a half package.

Proration 9

If there are 1 to 7 days left, infants receive a half package.

Proration 10

If there are 8 to 15 days left in their cycle, they receive a three-quarters package.

Proration 11

For all participants, late benefits can be issued up to and on the last date of their current cycle, or their LDTU.

<Transition Slide>

<screen description – no audio> Slide transitions to Issue Benefits page.

Edit Proration 1

In general, we should accept the prorated amount suggested by the system.

<Lines, boxes and checkmarks to package size fade>

However, there may be instances where it is appropriate to edit the suggested proration, and we should follow our local agency's guidelines as to when those may be.

Edit Proration 2

Go ahead and click the Edit button next to Merry's September benefits.

Edit Proration 3

The Modify First Set of Benefits modal opens which allows us to select a different package size and over-ride the system.

Go ahead and click the dropdown.

<no audio> Click the Package Size dropdown.

Edit Proration 4

We never select a package size that is smaller than that suggested by the system; we should only go bigger if over-riding it.

So, go bigger and select Full.

Edit Proration 5

The Reason for Editing dropdown is now enabled and is required by the system. Go ahead and click it.

<no audio> Click the Reason for Editing dropdown.

Edit Proration 6

MN WIC relies on our CPAs to determine if editing is appropriate, so we only collect a reason because the system requires it.

Our only option is Benefits issued late.

Go ahead and select it and click the Save button.

<no audio> Select Benefits issued late and click the Save button.

Edit Proration 7

<no audio> Select Benefits issued late and click the Save button.

<Waiting>

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

Edit Proration 8

Editing proration is a member-level change.

We can easily change it back to its original proration amount by clicking the Edit button again...

<no audio> Click the Edit button next to Merry's September benefits.

Edit Proration 9

...and clicking the Revert button.

<no audio> Click the Revert button.

Edit Proration 10

When providing a prorated food package, we want to make sure we let our participant or representative know which foods will be decreased in their first set and why.

We also want to avoid using terms like "half package" or "prorated" since these terms do not mean anything to them.

Let's click below the scroll bar again.

DS Mention 1

The Direct Ship toggle beneath Merry's September benefits displays only for formula.

Direct Ship is a method by which formula is provided directly to the participant.

Selected LDTU Mention 1

The Selected LDTU calendar at the bottom of the page allows us to adjust a household's benefit cycle.

Direct ship and cycle adjustment will both be addressed in other training modules.

Issuing Benefits 1

Again, in general, before issuing benefits, best practice is to ensure a WIC Card has been assigned.

Since food benefits are issued to the electronic benefit account (EBA) at the WIC Processor, WINNIE does not require that a WIC Card be assigned to issue benefits.

We never want to accidentally send a family home without a card to access their food benefits.

To issue, we click the Issue Benefits button.

Issuing Benefits 2

The Aggregated Issuance modal opens.

This provides a final opportunity to review the food items and quantities being issued to the entire household.

If necessary, we can return to the Issue Benefits page by clicking the Cancel button.

Issuing Benefits 3

All food items being issued to the electronic benefit account for the household are listed...

Issuing Benefits 4

...followed by the total household quantity, and then the quantity of that food item for each individual member.

If none of that food item is being issued, a zero quantity displays.

Each month is listed separately.

Food items that aren't issued every month will only display for the month they **are** issued.

Go ahead and click below the scroll bar to review each month.

<no audio> Click below the scroll bar.

Issuing Benefits 5

<no audio> Click below the scroll bar.

Issuing Benefits 6

Once we've skimmed the food packages, we complete our issuance by clicking the Send eWIC Data button.

<Waiting>

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

Issuing Benefits 7

If the issuance was communicated to the Electronic Benefit Account at the WIC Processor without error, the green banner displays.

Once the benefits are issued, the Generate Shopping List button is enabled.

Go ahead and click the button.

<no audio> Click the Generate Shopping List button.

Shopping List 1

Information about managing and downloading WINNIE documents, including the Shopping List, was provided in the Documents training modules, so we'll just transition to the document itself.

<screen description – no audio> Slide transitions to Shopping List.

Shopping List 2

The Shopping List is a snapshot of all food items just issued to the electronic benefit account (EBA) for each member of the household.

It has participant names on it, as well as the Primary Cardholder's, so always keep in mind the data privacy policies when generating it.

Shopping List 3

It is only accurate until the household uses their WIC Card to purchase food benefits, so it is not an appropriate document to provide except when benefits are first issued.

Most participants, if they have a smartphone and can use the My MN WIC App, probably won't be interested in a hard copy list but, regardless, we should always offer to print it.

Shopping List 4

The Shopping List can be handy for us as a quick way to see what was issued if there is ever a question about that.

Shopping List 5

Each section lists the participant's name, State WIC ID, which the members are sorted by, and the months issued.

If issued late, the first month starts with the First Date to Use (FDTU) or Issued Date through the LDTU.

The next two months start with the **Printed** First Date to Use (PFDTU).

Shopping List 6

The quantity of each food item is listed for each month.

Note that for September, the amount of milk is decreased to a three-quarters quantity.

This and the FDTU are the only indicators of proration.

Food items, like the Boost formula for Merry, won't display anything for months they aren't issued.

Go ahead and click below the scroll bar.

Shopping List 7

Following the individual lists is the aggregated, or combined, household list.

At the bottom is a list of the member's cert end dates, as well as a space to write the date of the next appointment or nutrition visit.

Close Issue Benefits 1

Returning to the Aggregated Issuance modal, clicking the Close button...go ahead...

<Waiting>

<screen description – no audio> Spin icon displays.

Close Issue Benefits 2

...returns us to Demographics.

We briefly looked at the Account Balance in the Documents training module.

Let's take a more detailed look now.

Open the Participant Menu.

Shopping List 8

Remember, we can generate the **Shopping List** from here, and if we hover over it...go ahead then click the button to continue...

Shopping List 9

...we can produce one for the household like we just viewed or just for the individual whose folder we are in.

Back to the Account Balance. Go ahead and select it.

<no audio> Select the Account Balance.

<Transition Slide>

We're just going to transition to the document again.

<screen description – no audio> Slide transitions to Account Balance.

Account Balance 1

The Account Balance is a real-time listing of the food items currently available for the household based on both issuance and purchases (or redemption).

It is the same information participants and representatives could find in the WIC App, at the bottom of their last receipt, using the customer service line, or from a Balance Inquiry at the store.

Account Balance 2

The Account Balance only shows the aggregated, or combined, household food items left for each benefit cycle.

Click below the scroll bar to view the rest of the document.

Account Balance 3

Like the Shopping List, it also provides the members' cert end dates.

It also has a small math section with conversion values if milk food items have decimals.

<Transition Slide>

<screen description – no audio> Slide transitions to Demographics page.

75 Day Rule 1

Let's take one more look at Issue Benefits.

75 Day Rule 2

In general, more than 3 months of benefits cannot be issued at a time, and WINNIE has a 75-day rule that governs this.

The explanatory message reads: Benefits cannot be issued because the difference between the participant's LDTU and today's date is not within 75 days.

75 Day Rule 3

So, there are more than 75 days (79 to be precise) between their Last Set LDTU of 12/8 and today's date of 9/20.

75 Day Rule 4

Let's return to the Search page.

Show Details 1

To complete our overview of issue benefits, let's toggle on Show Details then collapse the Search criteria panel.

Show Details 2

<no audio> Toggle on Show Details then collapse the Search criteria panel.

Show Details 3

The benefits we just issued now display in our Show Details.

Since we only issued November to Abe, that's all that shows.

If we click on Ashe's card...

Show Details 4

...his details show the September, October, and November benefit issuance.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

When editing the prorated amount, we should never select a package size that is smaller than that suggested by the system; we should only go bigger if over-riding it.

Answer #1

The answer is True.

If, per our agency guidelines, it is appropriate to edit the suggested proration, we should only choose package sizes that increase the amount provided, never smaller package sizes that further decrease the amount provided.

T/F Q#2

True or False?

If a household has a child turning 5 years old receiving one last set of benefits, and the system only toggles on one month for everyone else in the household, we should maintain the suggested issuance in order to keep everyone's benefit cycle in sync and the last LDTU the same.

Answer #2

The answer is False.

In general, we do want to keep everyone's cycle in sync and the last LDTU the same, except for instances whereby a member is becoming categorically ineligible.

In this instance, WINNIE will toggle on only one month for each member because it will always suggest the fewest months of benefits to keep the household in sync and does not take into consideration that the member isn't going to receive any more benefits.

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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