

Issue Benefits 2B – Manual Cycle Adjust - 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 an overview of manual cycle adjustment in WINNIE, the MN WIC Information System.

Date

The dates in this section of the module are based on today's date being September 23, 2023.

Cycle Adjust 1

Now that we understand what the system is doing when it shifts benefit cycles, the question becomes why would that be important?

Well, caseload management, especially when scheduling in-clinic appointments, can get very top heavy if there are a lot of new certs at the end of the month and all those households are assigned a first week cycle.

Another reason may be clinic availability.

If we are a small agency that only serves participants during the 2nd and 4th weeks, we may want to keep our household cycles in sync with our clinic availability.

Cycle Adjust 2

Augusta Wind is here for a nutrition visit and has a 1st to end of the month cycle, and our supervisor has tasked us with moving some of our first-week households to a 2nd or 3rd week cycle.

Let's take a look at how to do this.

WIC STAFF: We need to move some of our households from the first week to the second or third week.

Cycle Adjust 3

We've asked Augusta's mom if it would be OK to change the dates of her benefits each month and she's fine with it.

Go ahead and double-click on her card to open her participant folder.

WIC STAFF: We have a lot of people who get their benefits on the first like you, would you be OK if we changed you to a less busy time of the month?

PARTICIPANT: "Less busy? That sounds like a good thing. Sure."

<Waiting>

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

Alert 1

Our alert is still relevant, indicating a soy approval until the end of the year, so we'll just close it.

Food Prescription 1

As always, we should double-check the food prescription if we are issuing benefits.

Go ahead and open that page.

<no audio> Open the Food Prescription page.

<Waiting>

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

Food Prescription 2

She has a food prescription that starts on October 1.

Go ahead and expand it.

<no audio> Expand the October 1 food prescription.

Food Prescription 3

Once we double-check it's still good for the participant, we can issue benefits.

Go ahead and open Issue Benefits.

<no audio> Select Issue Benefits from the sidebar.

<Waiting>

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

Collapse Card 1

Just a quick reminder, there is a lot more to a nutrition visit than just checking the food package and issuing benefits, but this is our focus in these training modules.

OK. Continuing on.

Like other pages in WINNIE, we can collapse individual issuance cards by clicking the participant's name or the Toggle Accordion icon.

Go ahead and collapse April's card.

Collapse Card 2

An indicator displays next to the participant's name if there is a message in the collapsed card.

Let's do one other thing and select Augusta in the Household Member Information grid.

Cycle Adjust 4

The Selected LDTU allows us to choose a different cycle end date for the household.

Its default date is the LDTU of the first suggested set of benefits.

Go ahead and click the Calendar Control icon.

<no audio> Click the calendar control in the Selected LDTU field.

Cycle Adjust 5

The rules that govern what dates display are these:

One, the date must be the same as or after the PFDTU of the first suggested set or today's date, whichever is later.

The LDTU of the first suggested benefit set is always the last date available.

We cannot select a date after our first set's LDTU.

In other words, it must fall between the FDTU and the LDTU.

Cycle Adjust 6

The further we move into their cycle, or the later the issuance, the fewer the number of days to choose from.

Let's choose the 18th for the new LDTU.

Cycle Adjust 7

To complete the cycle adjustments, we must click the Save button.

<Waiting>

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

Cycle Adjust 8

To ensure there isn't a gap in benefits, the system provides the partial package starting on their previous PFDTU for October and ending on their new LDTU.

Her future sets now have a cycle of the 19th to the 18th.

Question 1

Before we issue, we are going to toggle off the December set. Why?

Is this why? True or false?

We are toggling off the December set because, otherwise, Augusta would be receiving 4 sets of benefits, which isn't best practice.

Answer 1

The answer is false.

It is fine to issue 4 sets of benefits because we are actually issuing only 3 **months** of benefits, and we always issue both the partial and the full set for the first month.

We are toggling off December because Augusta's cert ends on 12/31, and best practice is to certify in the month the cert ends before issuing the set with the PFDTU in that month.

Issue Benefits 1

Go ahead and finish issuing.

Toggle off December, collapse April's benefit card, and complete issuing the benefits, returning to the Demographics page, and following any cues that display. Click anywhere for a hint.

<audio – hint> Toggle off the December set of benefits.

Issue Benefits 2

<no audio> Click here (points to April Raines name to collapse her card)

<no audio> Toggle off December, collapse April's benefit card, and complete issuing the benefits, returning to the Demographics page following any cues that display. Click anywhere for a hint.

<audio – hint> Click April Raines name to collapse her card.

Issue Benefits 3

<no audio> Toggle off December, collapse April’s benefit card, and complete issuing the benefits, returning to the Demographics page following any cues that display. Click anywhere for a hint.

<audio – hint> Click the Issue Benefits button.

Issue Benefits 4

<no audio> Click below the scroll bar.

<no audio> Toggle off December, collapse April’s benefit card, and complete issuing the benefits, returning to the Demographics page following any cues that display. Click anywhere for a hint.

<audio – hint> Click below the scroll bar.

Issue Benefits 5

<no audio> Toggle off December, collapse April’s benefit card, and complete issuing the benefits, returning to the Demographics page following any cues that display. 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 6

<audio – hint> Click the Close button.

<screen description – no audio>

WIC STAFF: Would you like me to print the Shopping List for you?

Participant: “Nuh-uh. I use your app.”

<Waiting>

<screen description – no audio> Spin icon displays.

<Transition Slide>

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

End Long Cycle

The issued benefits display in Show Details.

<Transition Slide>

Let's take a look at one more example of manually adjusting the cycle.

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

Date

The dates in this section of the module are based on today's date being September 25, 2023.

<Transition Slide>

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

Short Cycle 1

We are on the Issue Benefits page for Rose Bush, and we've already verified her food package.

She is currently a first week cycle and we want to move her to our second, which provides late days.

This way, we can ensure we are able to schedule her appointments near her cycle.

Question 2

What will the available dates be in the Selected LDTU calendar?

- A. 9/1/23 – 9/30/23
- B. 9/25/23 – 10/24/23
- C. 9/25/23 – 9/30/23
- D. 10/1/23 – 10/24/23
- E. 9/1/23 – 10/24/23

<no audio> Click the button to continue.

Short Cycle 2

Were you right? Go ahead and click the Calendar Control in the Selected LDTU field.

Answer 2

The answer was C: 9/25/23 – 9/30/23.

The dates available are the FDTU to the LDTU for the first benefit set.

Short Cycle 3

None of which is what we need.

But let's see what happens if we select the 28th from the calendar.

Short Cycle 4

Click Save.

<no audio> Click the Save button.

<Waiting>

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

Short Cycle 5

Were you expecting nothing?

The manual cycle adjust works similar to the system cycle adjust for the last dates of a month, the 29th, 30th and 31st, except that it also changes the cycle to the 1st to the end of month if we select the **28th**.

Short Cycle 6

We still want to change her cycle.

In this instance though, we need to first issue her late set of benefits.

This will change our first set to be for October, allowing us a whole month, from October 1st through the 31st, to select from.

Short Cycle 7

Let's do that.

Go ahead and issue the September benefits, following any cues that display, and returning to the Issue Benefits page when done issuing for September. Click anywhere for hints.

<audio – hint> Toggle off the October benefits.

Short Cycle 8

<no audio> Click to collapse (beside Tree, Willow's name).

<no audio> Issue the September benefits, following any cues that display, and returning to the Issue Benefits page when done issuing for September. Click anywhere for hints.

<audio – hint> Click on Tree, Willow to collapse her benefit card.

Short Cycle 9

<no audio> Issue the September benefits, following any cues that display, and returning to the Issue Benefits page when done issuing for September. Click anywhere for hints.

<audio – hint> Click the Issue Benefits button.

<Waiting>

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

Short Cycle 10

<no audio> Issue the September benefits, following any cues that display, and returning to the Issue Benefits page when done issuing for September. Click anywhere for hints.

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

<Waiting>

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

Short Cycle 11

<no audio> Issue the September benefits, following any cues that display, and returning to the Issue Benefits page when done issuing for September. Click anywhere for hints.

<audio – hint> Click the Close button.

<Waiting>

<screen description – no audio> Spin icon displays.

Short Cycle 12

<no audio> Issue the September benefits, following any cues that display, and returning to the Issue Benefits page when done issuing for September. Click anywhere for hints.

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

<Waiting>

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

Short Cycle 13

OK. We have our October first set.

Now let's change Rose's cycle to an LDTU of the 11th. Go ahead. Click anywhere for hint.

<audio – hint> Click the Calendar Control icon in the Selected LDTU field.

Short Cycle 14

<no audio> Change Rose's cycle to an LDTU of the 11th. Click anywhere for hint.

<audio – hint> Select October 11th.

Short Cycle 15

<no audio> Change Rose's cycle to an LDTU of the 11th. Click anywhere for hint.

<audio – hint> Click the Save button.

<Waiting>

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

Short Cycle 16

We now have a partial package starting on the first, her old PFDTU, and ending on her new LDTU of the 11th.

Then a full package that begins with her new cycle of the 12th to the 11th.

Short Cycle 17

Once again, we are going to remove the last set before issuing.

This time, it's because with the September benefits, if we were to issue December as well, we'd be issuing 4 months.

Short Cycle 18

Go ahead and issue benefits to Rose following any cues that display. Click anywhere for hints.

<audio – hint> Toggle off the December benefits.

Short Cycle 19

<no audio> Click to collapse (displays next to Tree, Willow).

<no audio> Issue benefits to Rose following any cues that display. Click anywhere for hints.

<audio – hint> Click on Tree, Willow to collapse her benefit card.

Short Cycle 20

<no audio> Issue benefits to Rose following any cues that display. Click anywhere for hints.

<audio – hint> Click the Issue Benefits button.

<Waiting>

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

Short Cycle 21

<no audio> Click below the scroll bar.

<no audio> Issue benefits to Rose following any cues that display. Click anywhere for hints.

<audio – hint> We should always skim the food packages. Click below the scroll bar.

Short Cycle 22

<no audio> Issue benefits to Rose following any cues that display. Click anywhere for hints.

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

<Waiting>

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

Short Cycle 23

<screen description – no audio> Red X on Generate Shopping List button.

<no audio> Issue benefits to Rose following any cues that display. Click anywhere for hints.

<audio – hint> Click the Close button.

<Waiting>

<screen description – no audio> Spin icon displays.

Reminder 1

We always want to make sure we talk with our participant or representative about what a cycle change means for them, keeping it simple and specifically addressing that it changes the first and last dates that they can purchase WIC foods.

Click the button to continue.

Test Your Knowledge

Multiple Choice Q#1 (single answer)

Multiple Choice – select the correct answer.

Which statement is not true?

- A. The system adjusts new households certified on the 29th to 31st (except for January) to a benefit cycle of the first through the last date of the month.
- B. We should always issue the partial package and the full package with a PFDTU in the same month at the same time.
- C. If we select the 28th through the 31st in the Selected LDTU calendar, the system will shift the cycle to the 1st through the last date of the month.
- D. The dates available in the Selected LDTU calendar are based on the Printed FDTU and the LDTU of the first full set of benefits.
- E. A partial package and full package with a PFDTU in the same month are considered one month's worth of benefits.

Answer #1

The answer is D.

The dates available in the Selected LDTU calendar are based on the **first date to use**, or FDTU, which can either be the same as the PFDTU if issued early or the same as today's date if issued late, and the LDTU of the **first set of benefits**.

The available dates are between the FDTU and LDTU, inclusive.

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.

ISSUE BENEFITS 2B – MANUAL CYCLE ADJUST

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.

This institution is an equal opportunity provider.