Adjust Benefits Overview #2

05/18/2022 – WINNIE THE SCOOP NEWSLETTER #19

Introduction

First Slide

This module is the second overview of Adjust Benefits in WINNIE and is provided as part of the monthly WINNIE the Scoop! Newsletter #19.

Overview

Housekeeping

As we review this, please keep in mind that some screens may still be under development.

Also, please note that the browser zoom is set to 67% and that is for optimal viewing of this module.

Overview 1

In this module, we'll continue our review of Adjust Benefits, WINNIE's version of the Food Adjustment Wizard.

We'll take a look at how WINNIE calculates redemption when more than one member of the household is issued the same food item and we want to provide a different item from the same food category.

We'll also look at how to use the Update Future Months button.

Setup Scenario

Setup

Today is May 2nd.

The Lee household is calling because Brock's doctor suggested they try Lactose-Free milk for Brock who has been having issues with stomach upset.

They still have milk left to buy on their benefits and they are wondering if they can get Lactose-Free milk for Brock.

Brock Lee and his family were issued benefits on April 5th for March, April and May.

Taking a look at his April benefits, with a cycle of the 16th to the 15th, we can see that he was issued 3 gallons of Fat Free/Skim or 1% milk.

Setup 1

Also while reviewing his benefits, we notice that he was issued the default amount of cash-value benefits, instead of the increased CVB amount of $24 that is currently being provided.

So, we want to adjust that as well.

Go ahead and open Transaction History. Click for a hint.

<hint> Select Manage eWIC Account from Navigation pane.

Spin

<no audio> Cursor spins. Working…Please wait.

Transaction History

Manage eWIC

<hint> Select Transaction History from the left pane.

Transaction Hx Start

Since we want to see what's happening with his current set, let's set the Start Date to his April PFDTU. Select April 16 using the calendar icon.

<no audio> Click the calendar icon.

Start Date

<no audio> Select April 16th.

Transaction Type

We want to see redemption, so let's select that from the Transaction Type drop-down then click Search.

<no audio> Click the Transaction Type drop-down.

Redemption

<no audio> Select Redemption.

Search

<no audio> Click the Search button.

Purchase Records

There are a number of redemption records. Go ahead and double-click the first row to open the details for that purchase.

Transaction Details

Remember, purchases are randomly applied by the WIC Processor to household members issued the same food item.

In this instance, the purchase of cheese, yogurt and 3 gallons of milk have all been applied to Brock for whom we want to issue Lactose Free milk.

Go ahead and close this modal.

<no audio> Click the Close button.

Transactions

Instead of looking at all these rows, the following summarizes the purchases.

<display> Screen transitions to next slide.

Purchases 1

Brock's include: Grapes and Strawberries for $5.11 and $3.89 respectively for a total of 9 dollars, 36 ounces cereal, 1 lb cheese, 2 lbs bread, 1 dozen eggs, 1 quart yogurt, 3 gallons milk and 2 containers of juice.

Click the Continue button when done reviewing the purchases.

Purchases 2

Ginger's purchases include $1.68 of bananas, 36 ounces cereal, 1 dozen eggs, 1 quart yogurt, 3 gallons of milk and 2 containers of juice.

Click the Continue button when done reviewing the purchases.

Purchases 3

And Emma's purchases include 36 ounces of cereal, 1 quart yogurt, and 1 container of juice.

Click the Continue button when done reviewing the purchases.

Purchases 4

This is what we need to take away from this:

- A majority of the foods have been redeemed for Brock, including the 3 gallons of milk and $9.00 CVB issued to him both of which we want to adjust.

- All of the cereal and yogurt have been redeemed for the household.

- 5 of the 6 issued juice containers have been purchased.

<display> Screen transitions to new slide.

Open Adjust

OK. Let's go see what we can do about adjusting Brock's benefits.

<no audio> Select Adjust Benefits.

Spin

<no audio> Cursor spins. Working…Please wait.

Adjust Max

As we saw in the previous overview module, all food items issued to Brock display in the grid.

The max column displays the maximum amount allowed for each specific **food item** based on the participant's current WIC Category and age at the time of issuance.

Max Milk

If we look at the milk row, it has a max of 4 gallons but that is if he **only** received milk from the milk category.

Since he also received a quart of yogurt and lb of cheese, which combined, are the equivalent of that 1 gallon of milk, he was issued 3 gallons, which we know is the max he can receive.

Redemption Column

So here is where WINNIE gets interesting.

We saw earlier that all 3 gallons of Brock's milk and $9 CVB were redeemed.

But, when we look at the Redemption column, it shows a value of 0 for both milk and his CVB.

Redemption Calc

In WINNIE, as long as the value of the Amount Issued **is less than or equal to** the Household Balance, the Redemption displays as 0.

This means that although the WIC Processor has applied most of the redemptions to Brock, the system doesn't also apply those redemptions to Brock.

And this new functionality, increases our flexibility when adjusting benefits in WINNIE.

Milk Math

Let's apply this math to both milk and the CVB.

For Milk, the Amount Issued was 3 gallons, which is **less than** the Household Balance of 4.5, so the Redemption is 0.

CVB Math

For the CVB, the Amount Issued is 9.00, which is **less than** the Household Balance of 18.32, so the Redemption is 0.

By calculating the redemption this way, we are able to exchange the full issuance amount regardless of what the WIC Processor has applied as redemption to the individual participant.

Cereal Math

Now let's apply this to cereal and yogurt, all of which was already redeemed for everyone in the household.

For Cereal, the Amount Issued is 36 and the HH Balance is 0.

If the Amount Issued **is greater than** the Household Balance, the Redemption is calculated.

The Amount Issued **minus** the Household Balance equals the Redemption.

Yogurt Math

Same applies for Yogurt.

The Amount issued is greater than the Household Balance.

Therefore, the Amount Issued minus the Household Balance equals the Redemption.

Juice Math

Now let's look at juice.

There were a total of 6 containers issued and 5 purchased, which results in a Household Balance of 1.

Amount Issued is 2, which is greater than the Household Balance of 1, resulting a Redemption of 1.

Recovered Column

As long as the Amount Issued is less than or equal to the Household Balance, we can recover the entire Amount Issued.

If the Amount Issued is greater than the Household Balance, we can only recover what's left in the Household Balance.

Obviously, juice isn't a great example since it's unlikely we'd recover it, but we can easily see how the math works.

Available Column

In general, until we recover something, nothing is Available.

Unless we are adding a food item that wasn't originally in the food package, which we can do in WINNIE.

Let's do that by starting our adjustment with the CVB.

Click the Add Food Item button.

Base Food Cat 1

Click the Base Food Category drop-down.

Cash Benefit

Only those food items that either aren't already included or can be adjusted display in the Base Food Category drop-down.

Select Cash Benefit.

Cents

The Food Item Calculator displays the current maximum of 2400 and that we have 900 allocated and can issue 1500 more.

Remember, when we issue CVBs the quantity is denoted by cents not dollars.

Click the Food Item drop-down.

Select CVB

The only CVB item we can select is the food item with the higher maximum.

Go ahead and select it.

<no audio> Select the Fruit/Veg CVB – 24, 43 and 47 dollars.

CVB Quantity

The default quantity is the maximum allowed based on our participant's WIC Category of child.

If we look at our calculator, it indicates we must subtract 900 from our quantity.

We'll enter that value into the quantity field: 2400 – 900 is 1500.

Double-click into the Quantity field.

CVB Quantity 1

We are going to press Enter after typing our value, which will automatically save the change.

Type 1500 and press Enter.

CVB Added

Notice a new line item is added but that it has the same description as the $9.00 CVB.

The Food Distribution Item is the description used on the benefit.

Whether we issue the default $9 or the $24 CVB, the participant sees the same description.

But since the $9 and $24 are different food items, at this point, the grid displays them separately.

CVB Done

CVB done.

Next, let's adjust Brock's milk to Lactose Free.

Recover Milk

Since all items from the milk category have already been issued, our first step is to recover the milk currently issued to the card.

Double-click inside the Recovered field in the milk row.

Recover Milk 1

Enter the amount we want to recover and press the Tab key.

<audio-failure hint> We want to recover the milk on the card that was issued to Brock, which was 3 gallons.

Add New Milk

Now that we've recovered 3 gallons of milk, we have 3 available.

Second step is to add the Lactose-free milk.

Go ahead and do that. Click for a hint.

<audio-failure hint> Click the Add Food Item button.

Add New Milk 1

<audio-failure hint> Click the Base Food Category drop-down.

Add New Milk 2

<audio-failure hint> Select MILK.

Add New Milk 3

<audio-failure hint> Click the Food Item drop-down.

Milk Items

Only those milk items that can be issued to our participant, based on WIC and age categories, display in the Food Item drop-down.

Continue with the adjustment.

<audio-failure hint> Select Fat Free or 1% Lactose Free milk.

Milk Quantity

Double-click inside the Quantity field.

Milk Quantity 1

Type the correct quantity and press the Enter key to save the food item.

<failure hint> We want to replace what we recovered. Or, using the Food Item Calculator: we have a max of 16 allowed quarts and 20 allocated. Doing the math: 16 − 4 = 12.

Summary

To summarize our adjustments, we've added 15.00 to the CVB, removed 3 gallons of "regular" milk, and added 3 gallons of Lactose-free milk.

Update Future Months

We can use the Update Future Months button to make these same adjustments to Brock's future set.

We need to note that Update Future Months simply makes an exact copy of the changes made to the current benefit set.

Go ahead and click the button.

<no audio> Click the Update Future Months button.

Spin

<no audio> Spin icon on screen.

Future Month

Click below the scroll bar.

Future Month 1

Notice the exact same changes have been made to Brock's May benefits.

Click below the scroll bar again.

Send eWIC Data

Last step, click the Send eWIC Data button to send the changes to the WIC Processor.

Spin

<no audio> Cursor spins. Working…Please wait.

New Benefits

Brock's adjusted current benefits.

Click below the scroll bar.

New Future

Brock's adjusted future benefits.

And the Status banner indicates the communication with the WIC Processor was successful.

As always, let's check out Benefits History. Go ahead.

<audio-failure hint> Select Benefits History from the navigation pane.

Benefits Hx After

Toggle on May then April.

May Benefits

<no audio>Toggle on May then April.

View Benefits

Click below the scroll bar to view the May and April benefits.

View Benefits 1

<no audio> Click below the scroll bar to view the May and April benefits.

View Benefits 2

<no audio> Click below the scroll bar to view the May and April benefits.

Open Food Rx

Next, Food Prescription. Go ahead.

<audio-failure hint> Select Food Prescription from the navigation pane.

Food Rx

Expand the 5/16/2022 food package.

<no audio> Click the effective date to expand the food prescription.

Create New FP

Remember, the system creates an exact duplicate of whatever was issued in Adjust Benefits.

In this case, the 12 quarts of lactose-free milk is fine.

But there are two different CVBs and we want to ensure the correct CVB is on future food packages.

Let's create a new default food package for his June benefits, which start on the 16th.

Go ahead and do that. Click for hints.

<no audio-display> Create a new default food package for Brock's June benefits, which start on the 16th.

<audio-failure hint> Click the Add Food Prescription button.

New FP

Click the calendar icon in the Effective Date field.

<no audio-display> Create a new default food package for Brock's June benefits, which start on the 16th.

New FP 1

<no audio-display> Create a new default food package for Brock's June benefits, which start on the 16th.

<audio-failure hint> Click the right arrow icon.

New FP 2

<no audio-display> Create a new default food package for Brock's June benefits, which start on the 16th.

<audio-failure hint> Select the 16th.

Use Default

<no audio-display> Create a new default food package for Brock's June benefits, which start on the 16th.

<audio-failure hint> Click the Use Default button.

Spin

Spin icon displays.

Delete First

Unlike HuBERT, the food limit validations occur when the food item is added, not when the food prescription is saved.

This means we always have to **delete** the food items we want to replace **first**.

Let's replace the CVB first then the milk. Go ahead. Click for hints.

<audio-failure hint> Select the FRESH or Frozen Fruits and Vegetables row.

Delete CVB

<audio-failure hint> Click the Delete button.

Delete CVB 1

<audio-failure hint> Click the Yes button.

Add CVB

To make sure that we remember to replace everything we remove, we should always **immediately add the deleted food item's replacement**.

Go ahead and add the 24, 43, and 47 dollar CVB. Click for hints.

<audio-failure hint> Click the Add button.

Base Category

<audio-failure hint> Click the Base Food Category drop-down.

Cash Benefit

<audio-failure hint> Select CASH BENEFIT.

Cash Benefit 1

<audio-failure hint> Click the Food Item drop-down.

Cash Benefit 2

<audio-failure hint> Select Fruit/Veg CVB - 24, 43, and 47 dollars.

Save CVB

Since we have to scroll to click Save, let's just hit the Enter key as a shortcut.

Delete Milk

Now we'll do the same for milk. Delete, then add the Lactose-Free Milk. Click for hints.

<audio-failure hint> Select the Fat Free/Skim or 1% milk row.

<audio-failure hint> Click the Delete button.

Add Milk

<audio-failure hint> Click the Add button.

Base Category 1

<audio-failure hint> Click the Base Food Category drop-down.

Milk

<audio-failure hint> Select MILK

Milk 1

<audio-failure hint> Click the Food Item drop-down.

Milk 2

<audio-failure hint> Select Fat Free or 1% Lactose Free milk.

Enter to Save

What if we hit our Enter key now? Go ahead.

Milk Validation

The validation displays now, as we mentioned earlier, before the food item is added to the food package.

This is different from HuBERT.

Go ahead and double-click inside the Quantity field.

Milk Quantity

Type the quantity and press the Enter key.

<audio-failure hint> Per the Calculator, the Maximum is 16 and Allocated is 20, so the quantity must be decreased by 4. Type 12 and press the Enter key.

Save New FP

Go ahead and save the new Food Package.

<no audio> Click the Save button.

Spin

<no audio> Cursor spins. Working…Please wait.

FP Done

<no audio> Changes saved banner displays.

The takeaway from this is that in most instances, we will need to update the food package after making adjustments to ensure the correct food items and quantities are included.

Next Month

Next Month

In the next WINNIE the Scoop! we'll continue our review of Adjust Benefits and take a look at adding more formula for a breastfeeding infant, adding the CVB to the infant's food package if not initially issued, as well as another look at using the Update Future Months function.

End Slide

Thank you for taking the time to review this WINNIE overview module.

Minnesota Department of Health - WIC Program 85 E 7th Place, PO BOX 64882, ST PAUL MN 55164-0882; 651-201-3942, health.wic@state.mn.us, www.health.state.mn.us; To obtain this information in a different format, call: 651-201-3942