

Benefit Issuance Overview #1

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Overview

First Slide

This module is the first overview of Benefit Issuance in the WINNIE System and is provided as part of the monthly WINNIE the Scoop! Newsletter #16.

Intro

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.

HHID

To begin, let's search by Household ID. Click into that field.
Type: 13560666 and press the Enter key or click the Search button.

Details

To see the household member's cert and issuance information, we need to toggle on **Show Details**.

<no audio> Click the **Show Details** toggle.

Display

And, since Ma is auto-selected in the grid, her details display.

Let's click below the scroll bar to view all the details.

<no audio> Click below the scroll bar.

Cards

Each rectangle with a different member's information is a participant card.

Click each participant card to view each member's details,

Click to view Lotta's Details.

View Next Child

Click to view Justin's Details.

View Infant

Click to view Will's Details.

Open PF

Go ahead and double-click Will's card to open his participant folder.

Alert

As long as there are system or user alerts, the *Display Alerts* modal opens each time a participant folder is opened from the Participant Search screen.

Press the Enter key or click the Close button to close the Alerts.

Benefits Management

There are three functions under the *Benefit Management* portion of the navigation pane: *Add Set of Benefits*, which is only enabled when very specific criteria are met, *Adjust Benefits*, which is equivalent to the Food Adjustment Wizard in HuBERT, and *Issue Benefits*.

We are reviewing *Issue Benefits*, so click that.

<no audio> Select *Issue Benefits* from the navigation pane.

HH Mbr Info

It generally takes less than 5 seconds for the *Issue Benefits* screen to load.

All members of the household, including categorically ineligible members, display in the *Household Member Information* grid.

The Additional Information card displays Certification and Issuance information for the selected member.

Go ahead and click below the right scroll bar so that we can view the *Issuance Details*.

<no audio> Click below the right scroll bar.

Issuance Details

Like HuBERT, messages display to explain why benefits cannot be suggested, and what will need to be addressed for the system to be able to suggest them.

If messages display, the issuance toggle is off and disabled.

If benefits are suggested, the toggle is on by default.

Ma is no longer eligible for food benefits because she is some-breastfeeding.

Which means we need to update Will's **Breastfeeding Verified Date** and, it appears, create a food package for Justin for the 3-to-5-year age category.

Since we are in Will's participant folder, let's update his **Breastfeeding Verified Date** first.

Select *Health Information* from the navigation pane.

Health Info

Click the calendar icon for the **Breastfeeding Verified Date**.

Calendar

Like HuBERT, the calendar opens to the date currently displayed in the field.

Unfortunately, **unlike** HuBERT, there isn't a shortcut Today button.

So, we are going to click the forward, or right, arrow until we get to today's date. Go ahead and do that.

<no audio> Click the **forward, or right, arrow** until the month is February.

Months

<no audio> Click the forward, or right, arrow until the month is February.

And select today's date, **February 7**.

Save

Any time we make changes to a screen, we need to click **Save**. Do that.

<no audio> Click the **Save** button.

Spin

<no audio> Circle spins.

Banner

Once saved, the green "Changes saved" banner displays.

Next, we have to create a new 3-to-5-year food package for Justin.

To open Justin's folder, we click the **Participant menu** in the top right corner.

<no audio> Click the Participant Menu.

Participant Menu

And select him from the *Other Household Members* list.

<no audio> Click on Power, Justin.

Other Child PF

We are now in Justin's folder and his Health Information screen.

Select *Food Prescription* from the navigation pane.

Food Rx

Let's create a default food package.

Click the **Add Food Prescription** button.

DFP

Click the **Use Default** button.

Save DFP

And click the **Save** button.

Issue Again

OK. We're ready to go back to the *Issue Benefits* screen. Select that from the navigation pane.

<no audio> Select **Issue Benefits** from the navigation pane.

Issuance

So, Lotta is turning 5 and her last set is for February.

Let's take a look at Justin and Will.

Click below the scroll bar in the *Household Member Information* grid.

<no audio> Click below the scroll bar.

Cert Info

And select Justin's row.

<no audio> Click on Justin's row.

Cert Info 1

His cert ends in March, so we would expect February and March benefits.

Select Will's row.

<no audio> Click on Will's row.

Cert Info 2

His cert ends in July.

OK. Click below the scroll bar to view the suggested benefits for the household.

<no audio> Click below the scroll bar.

Toggles

Like HuBERT, the system will suggest sets to keep the members' Last Date to Use in sync.

Also, like HuBERT, the toggles work together.

Selecting the last set for Will...

<no audio> Toggle on the last set for Will.

...will auto select any unselected earlier sets.

Toggling off the first set...

<no audio> Toggle off the first set for Will.

Toggle Off

...will automatically deselect all toggles, including the main toggle.

And toggling the main toggle on....

<no audio> Toggle on Will's main toggle.

All Toggles

...auto-selects all sets.

OK. Let's keep Will and Justin in sync.

Toggle off Will's April set...

<no audio> Toggle off Will's April set.

... and toggle on Justin's March set.

<no audio> Toggle on Justin's March set.

To issue, click the **Issue Benefits** button.

<no audio> Click the Issue Benefits button.

Aggregate

Again, like HuBERT, the Aggregated Issuance modal opens and lists the months benefits were issued for, the members issued benefits, all food items issued, the quantities of each food item for each member, and the total household issuance for that benefit set.

To complete the issuance, we click the **Send eWIC Data** button.

<no audio> Click the **Send eWIC Data** button.

Aggregate Spin

<no audio> Working...please wait with blue spin circle.

Success

If everything is successful, the green banner displays, and the Generate Shopping List button becomes enabled.

Click the button.

<no audio> Click the **Generate Shopping List** button.

Downloads

The *Downloads* panel opens.

Clicking **Open File** will automatically open the *Shopping List* in Microsoft Word.

<no audio> Click **Open File**.

Shopping List

Click the Continue button.

<no audio> Click the **Continue** button.

Close Downloads

Back in our browser tab, we can close the *Downloads* panel by clicking the x.

<no audio> Click the **X** on the *Downloads* panel to close it.

Close Aggregate

And close the Aggregated Issuance modal.

<no audio> Click the **Close** button.

Open Benefits Hx

Which, like HuBERT, always returns us to Demographics.

Let's take a quick look at *Benefits History*.

Select it from the navigation pane.

<no audio> Select ***Benefits History*** from the navigation pane.

Benefits Hx

In the Benefit Period panel, basic information displays for each set issued (in this instance, to Justin) including dates, participant's WIC Category at the time of issuance, and the Clinic and Agency where they were issued.

To view the benefit set, we toggle it on. Go ahead and do that.

<no audio> Toggle on the March benefit set.

Benefit Set

And all of the pertinent details display with one click.

Next Month

In the next WINNIE the Scoop, we will take a more extensive look at Benefits History and other benefit issuance functions, such as setting the issuance frequency, editing the first set, cycle adjusting and how to direct ship.

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