

# Adjust Benefits 1 – Formula Overview - WINNIE Online Training Module

AUGUST 2023

## Introduction

### Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It provides an overview of Adjust Benefits in WINNIE, the MN WIC Information System.

### Date

All dates in this module are based on today's date being August 4, 2023.

## Overview

### Overview 1

Adjust Benefits allows us to modify issued formula or food items when redemption has already occurred for the current set of benefits.

### Overview 2

The Adjust Benefits Rule of Thumb is that if benefits were issued with incorrect formula or food items, and no redemption has occurred, we should use Adjust Benefits to void them, correct the food package, and then reissue the benefits in the Issue Benefits page.

Only if redemption has already occurred, should we use Adjust Benefits to correct the issued formula or food items in the current benefit set, and then we can decide what to do with any future benefits, either void or adjust them.

### <Transition Slide>

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

## Sidebar 1

Unlike Issue Benefits, which is disabled if the participant isn't eligible for benefits, Adjust Benefits is always enabled on the sidebar.

### <Transition Slide>

<screen description – no audio> Slide transitions from Demographics page to Adjust Benefits message.

There are three potential validation messages that display before Adjust Benefits opens.

## Validations 1

If there aren't any issued benefits that can be adjusted, a red banner that reads "Benefits cannot be adjusted because the participant has no current or future benefits" displays.

### <Transition Slide>

<screen description – no audio> Slide transitions to pink validation banner that reads: Benefits cannot be adjusted because the participant's breastfeeding verified date is not today's date.

## Validations 2

Since the Breastfeeding and Food Package III Verified Dates must be the current date in order to issue benefits, these validations also apply when adjusting them, and we must update the verified dates before the Adjust Benefits page will open.

### <Transition Slide>

<screen description – no audio> Slide transitions to pink validation banner that reads: Benefits cannot be adjusted because the participant's Food Package III verified date is not today's date.

## Validations 3

These validations result in one caveat to this statement: Adjust Benefits allows us to modify food items on an issued set of benefits through the Last Date to Use.

However, if a Breastfeeding or Food Package III participant's certification has ended before their Last Date to Use and they need a food item adjusted after their Cert End Date, we will not be able to adjust them because the Health Information page will be disabled and we will be unable to update these dates, which must be the current date to use Adjust Benefits.

Click the button to continue.

<screen description – no audio> Pink validation banner reads: Benefits cannot be adjusted because the participant's breastfeeding verified date is not today's date.

## Benefits History 1

We are currently working in Bud Abing's folder.

Before we open Adjust Benefits, we're going to take a look at all the pages that impact what we'll see.

Let's start by taking a look at Bud's Benefits History.

<no audio> Select Benefits History from the sidebar.

## Benefits History 2

Go ahead and toggle on the July set of benefits.

## Benefits History 3

A couple of things to note.

He was issued benefits for 4 cans of Elecare, infant foods, and cereal two days ago.

These benefits were late issuance and prorated to a three-fourths package.

The Status of Paid in the Details panel indicates some sort of redemption has occurred.

Let's click collapse this issuance card.

## Benefits History 4

He was also issued 2 cans of Elecare, which were direct shipped, and since the PFDTU is in the past, their Status is also Paid in the Details panel.

Next, let's take a look at Transaction History.

Select Manage eWIC Account from the sidebar.

## <Waiting>

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

## Transaction History 1

Select Transaction History from the left panel.

## Transaction History 2

We're checking redemption for the current set.

Let's just leave the Start and End Dates and Transaction Type as is.

Click the Search button.

<Waiting>

<screen description – no audio> Spin icon and “Working...please wait” display.

### Transaction History 3

As expected, redemption.

Double-click the Purchase row.

<Waiting>

<screen description – no audio> Spin icon and “Working...please wait” display.

### Transaction History 4

2 cans of Elecare were redeemed.

Click the Close button.

### Transaction History 5

Next, let’s take a look at his food prescriptions.

Select Food Prescriptions from the sidebar.

<Waiting>

<screen description – no audio> Spin icon and “Working...please wait” display.

### Food Prescription 1

Click the 8/2/23 food package to expand it.

### Food Prescription 2

Bud’s food package is for 7 cans of Elecare and the 6-8 month infant foods.

He also has a 9-month food package dated 9/15 and child food package dated 12/15.

Lastly, since Bud is receiving a medical formula, before opening Adjust Benefits we will need to update his Food Package III Verified Date to today.

Go ahead and do that. Click anywhere for a hint.

<audio – hint> Select Health Information from the sidebar.

### Health Information 1

<no audio> Use the calendar control in the field.

<audio – hint> Click the calendar icon in the Food Package III Verified Date field.

## Health Information 2

<audio – hint> Select the 4th from the calendar dropdown.

## Health Information 3

<audio – hint> Click the Save button.

## <Waiting>

<screen description – no audio> Spin icon displays.

## Health Information 4

Now let's take a look at Adjust Benefits. Go ahead and open that page.

<no audio> Select Adjust Benefits from the sidebar.

## <Waiting>

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

## Adjust Benefits 1

The Adjust Benefits page displays each issued benefit set with a Last Date to Use in the future that has been issued to the household member whose folder we are currently in

The current set displays first followed by any future benefit sets.

## Adjust Benefits 2

If the current benefit set was issued late and prorated, like this one, the prorated amount displays first followed by the cycle's Printed First Date to Use, or PFDTU, within brackets then the First Date to Use and Last Date to Use.

A Void toggle displays to the far right of the benefit set header.

If any redemption has occurred, including if Direct Shipped benefits have a status of paid, the void toggle for the current set is disabled.

## Adjust Benefits 3

The Update Future Months function copies any adjustments we make to the current set to the future sets.

We'll take a look at this in another module.

## Adjust Benefits 4

For participants issued both formula and foods, two separate grids display, one for Formula Items and one for Food Items.

A button displays above each grid that allows us to add formula and food items to the existing benefits.

All adjustments made to issued formula and foods occur within these grids, which are populated with issuance and redemption information from our WIC Processor.

Let's take a closer look at the Formula Items grid.

### Formula Dist. Item 1

The first column is labeled Food Distribution Item.

That's simply the text that displays for a formula or food item in the App, Account Balance, and Shopping List.

### Headers 1

Depending on our screen real-estate, the column headers may be abbreviated.

We can view each column header by hovering over it to show the tooltip.

### Headers 2

Go ahead and take a minute to hover over each column header to view the full label in a tooltip.

Click the button when ready to continue.

### Max Amount 1

The formula grid displays the type of issued formula and again, we can hover to view the tooltip.

Do that then click the button to continue.

<no audio> Hover over the formula to view the tooltip.

### Max Amount 2

There are two coordinating rows, one based on cans and the other on reconstituted ounces.

The first column indicates the maximum number of cans **that could potentially be issued**.

The Max Amount is based on the participant's current WIC Category, current Breastfeeding Amount, and their Age Category at the time of issuance.

## Max Amount 3

If we were to use the MN WIC Medical Formula Amounts Guide found on the MDH WIC website as reference, and look up Elecare...

Click the button when ready to continue.

## Max Amount 4

...we'd see that this Max Amount reflects the number of cans provided to Food Package III Infants who are some-breastfeeding and fully formula fed 6-11 months old with no infant foods.

## Reconstituted Ounces 1

Reconstituted ounces is the liquid measurement of the formula once water has been added.

So, in this instance, 950 ounces is the maximum amount of liquid formula that can be provided.

If we multiply 95 ounces per can by 10 cans, we get the maximum value of 950.

We will take a closer look at the impact of Reconstituted Ounces in another module.

## EBT & DS 1

The EBT Amount Issued is the number of cans issued to the WIC Card.

The Direct Ship Amount Issued is the number of cans directly provided to the participant by the State Office or our clinic.

As we saw when issuing benefits, in WINNIE, formula can be issued to both the WIC Card and direct shipped.

## EBT & DS 2

The sum of the cans in the EBT Amt Issued and DS Amt Issued columns is the total number of cans issued for this benefit set, which was 6.

## HH EBT Balance 1

The Household EBT Balance is the number of cans still left on the WIC Card.

## Redemption 1

Before we continue, a little review.

Since these are the current set of benefits, we know that the PFDTU is either today or in the past, which means any direct shipped benefits have a status of paid and are considered redeemed.

We also saw in Transaction History that 2 cans had been redeemed.

## Redemption 2

Since the EBT Amount Issued is the number of cans **originally** on the card and the household EBT Balance is the number of cans **left** on the card, we can do some easy subtraction.

4 cans minus 2 cans equals 2 cans redeemed.

So, the Redemption column is the sum of the direct shipped cans and the redeemed cans.

That said, this simple math works with these columns because Bud is the only member of his household issued this particular food item.

As we'll see in another module, redemption is a bit different when more than one member of the household is issued the same food item.

## Returned & Recovered 1

The Returned column is the number of **unopened** cans that have been purchased or direct shipped and are now being brought back to the clinic to exchange.

The Recovered column is the number of cans we want taken off of the WIC Card.

## Available 1

The number of cans in the Available column is calculated by WINNIE based on a slew of variables, such as WIC Category, Breastfeeding Amount, age at issuance, the formula item, the cans returned and/or recovered, and whether infant foods have been issued.

In this instance, it is the number of cans allowed for Food Package III when infant foods are issued, which is 7, minus the 4 cans redeemed, which leaves 3, minus the 2 cans left on the card, which leaves us with 1 can available.

## Prorated 1

The one thing WINNIE does not consider in its calculations is proration.

However, we **are** required to maintain the prorated issuance when adjusting benefits.

## Prorated 2

Just because WINNIE indicates there is 1 can available, does not mean we should automatically provide that can.

In this instance, Bud was issued 6 cans because his food package was prorated.

In order to provide any more cans, we must first return or recover.

## Additional 1

The Additional Quantity is the number of cans we are going to provide to the participant.

The Returned, Recovered, and Additional fields are all limited by the values in other columns, and validation messages will display if their limits are exceeded.

## Direct Ship 1

In the last column, if a formula can be direct shipped, the Direct Ship toggle will enable once the Additional Quantity field is greater than 0.

## Food Item Grid 1

Most of the columns are the same in the Food Items grid.

However, since we do not allow foods to be direct shipped, the Amount Issued isn't broken into two columns, EBT and Direct Ship, like the Formula Items grid.

And, since the Household Balance is all on the WIC Card, the Household Balance header does not specify EBT.

Lastly, since we do not allow participants to return foods, the Return column does not display in the Food Items grid.

## Collapse 1

Just like other pages in WINNIE, we can collapse each benefit set's card, and we'll use this a lot in the training modules.

Click the Current Benefit Period in the header to collapse the current set's card.

## Collapse 2

Now click the down arrow on the far right of the Future Benefit Period's header.

## Collapse 3

Pick whichever method and collapse the third benefit set's card.

## Send Button

At the bottom of the page is a Send eWIC Data button that becomes enabled once changes are made to the page.

We click this to communicate our adjustments to the WIC Processor.

The Cancel button resets the page if any changes have been made that we don't want to keep.

This completes our overview of the Adjust Benefits page when formula and infant foods have been issued.

In the next module, we'll look at adjusting Bud's benefits.

Click the button to continue.

## Test Your Knowledge

### T/F Q#1

True or false?

We should only use Adjust Benefits to adjust issued formula or food items if there has already been redemption for the current benefit set. Otherwise, we should only use Adjust Benefits to void.

### Answer #1

The answer is true.

If there is redemption, our only option to modify the current set of benefits is to use Adjust Benefits. We can choose what to do with the future sets.

However, if there isn't redemption, the benefits should just be voided, a new food package created, and the benefits reissued using the Issue Benefits page.

### T/F Q#2

True or false?

We only have to update the Breastfeeding and/or Food Package III Verified dates if using Adjust Benefits to modify the issued food items. We don't have to update these dates if using Adjust Benefits to void the benefits.

### Answer #2

The answer is false.

In order for the Adjust Benefits page to open, regardless of whether there has been redemption and we are modifying or if there isn't redemption and we're voiding, these dates must be updated.

## 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.

*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](mailto:health.wic@state.mn.us), [www.health.state.mn.us](http://www.health.state.mn.us); to obtain this information in a different format, call: 1-800-657-3942.*

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