Adjust Benefits 1A – Formula Scenario 1 - WINNIE Online Training Module

AUGUST 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is a review of changing formula in 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.

Formula Scenario 1: New Medical Formula

Scenario Overview

The following is the scenario for this module: we're changing to a new medical formula; the original medical formula was partially direct shipped and issued to the WIC Card; there has been some redemption; and we're going to void the future benefits.

Scenario 1

In the last module, we updated Bud Abings's Food Package III Verified Date and had opened the Adjust Benefits page.

Bud is a 7-month old food package III infant.

We've received the necessary documentation from the doctor to change his formula to Neocate w/DHA & ARA and we are still providing the infant cereal and foods.

The doctor is Sawyer Bones and it's approved until 10/31/23.

Scenario 2

Also, mom brought in 3 unopened cans of Elecare to exchange.

Quick review: 6 cans were originally issued, 2 were direct shipped, has 2 on his card, he's redeemed 4, and he has one available, but only because it wasn't issued due to Bud's first set being prorated, which we are required to maintain.

Adjust Formula 1

OK. Let's begin with those 3 cans mom brought in.

Go ahead and double-click inside the field where you think we should start. Click anywhere for a hint.

<audio – hint> We're starting with returning cans. Double-click inside the Returned column.

> WIC STAFF: Great! We can exchange those for you as well.

Adjust Formula 2

Right. We are returning 3 cans. Go ahead and enter the number of cans.

<no audio> Type 3 into the Returning column.

Adjust Formula 3

These fields are kind of funky because we may want to hit enter after typing our values, but we actually need to either press the Tab key on the keyboard or click somewhere on the page for WINNIE to calculate the change.

Go ahead and do that.

<no audio> Press the Tab key on the keyboard or click somewhere on the Adjust Benefits page.

<Waiting>

<screen description – no audio> Quick flash of dark screen while calculating.

Adjust Formula 4

The values in the EBT Amt Issued, DS Amt Issued, HH EBT Balance, and Redemption columns remain static.

Because these values are provided by the WIC Processor, they only recalculate once we communicate our changes.

The Available column is dynamic and recalculates as we Return, Recover or Add cans, and now displays 4 cans.

Adjust Formula 5

Since we are changing formula, we also need to remove all cans from the WIC Card, so next we'll recover the 2 cans from the HH EBT Balance column.

Go ahead and double-click into the Recover column.

Adjust Formula 6

Enter the number of cans then hit Tab or click somewhere on the page.

Adjust Formula 7

<no audio> Enter the number of cans then hit Tab or click somewhere.

<Waiting>

<screen description – no audio> Quick flash of dark screen while calculating.

Adjust Formula 8

The Available is now 6.

OK. We have taken care of the originally issued formula.

Next step is to add the new formula.

Click the Add Formula Item button.

New Formula 1

The Formula Item modal opens.

Because Bud is Food Package III, the Formula Type defaults to Special Prescription.

On the right, the Food Item Calculator shows, in reconstituted ounces, how much formula is available to issue.

The most we can provide or our limit, the amount we've already provided, which is the 1 can we did not return or recover, and the number of ounces that can still be issued.

Click the Food Item drop-down to select the new formula.

New Formula 2

Only the formulas that can be issued to this type of participant will display.

Select Neocate Infant with DHA & ARA.

New Formula 3

The default Quantity is the maximum allowed with infant foods and the calculator updates to reflect this.

Since this is a new medical formula, the Special Prescription Item card displays.

Click into the End Date field and type our approval end date of 10/31/23.

New Formula 4

<no audio> Click into the End Date field and type our approval end date of 10/31/23.

New Formula 5

Click into the Physician's Name field and we'll quickly type it in.

New Formula 5A

<screen description – no audio> Sawyer Bones, Dr. typed into the Physician's Name field.

New Formula 6

Select the Reason from the dropdown.

New Formula 6A

<no audio> Select the Reason from the dropdown.

New Formula 7

We don't have to click the OK button here because we'll save everything when we're done.

But we **do** need to adjust our Quantity.

Whenever our Remaining value is **negative**, we need to **decrease** the number of cans being provided.

New Formula 8

If we were to click OK before adjusting our quantity, a validation message would display telling us that this value must be reduced.

New Formula 9

When we hover over the field, tiny spin arrows display.

Hover then click the tiny, tiny down spin arrow.

<no audio> Hover over the Quantity field, then click the tiny down spin arrow.

New Formula 10

As long as our Remaining quantity is positive and less than the reconstituted ounces of 1 can, we're good to go.

Click the button when ready to continue.

New Formula 11

Click the Formula Item modal's OK button to save all our changes.

Adjust New 1

The new formula is highlighted in green and displays below the original formula since we still need to communicate the original formula's information to the WIC Processor.

All of our Available cans have now been automatically added to the Additional Quantity field in our new formula row.

Adjust New 2

Even though the system will allow us to issue all 6 cans, we are responsible for maintaining the prorated issuance.

We returned and recovered 5 cans, so we are going to add only 5 cans back to the WIC Card.

Hover over the Additional Quantity field in the Neocate Cans row to display the tiny spin arrows then click the down spin arrow and press Tab or click somewhere on the page.

Adjust New 3

<no audio> Hover over the Additional Quantity field in the Neocate Cans row, click the tiny down spin arrow and press Tab or click on the page.

Collapse 1

OK. We're good to go for the current set.

Go ahead and collapse the card for the current benefit set.

Void Future 1

We're going to void Bud's future benefits.

We can rely on WINNIE to disable the void toggle when appropriate and to display a tool tip indicating the reason.

Hover over the disabled void toggle in the Current Benefit Set's header to see why it is disabled.

Click the button to continue.

Void Future 2

To void benefits simply toggle on void in the benefit set's card header.

<no audio> Toggle on void.

Void Future 3

Just like in Issue Benefits, toggling off the second set of benefits automatically toggles off the third set.

Go ahead and collapse the second, then third set of benefits.

Collapse 2

<no audio> Go ahead and collapse the second then third set of benefits.

Send Data 1

To complete our benefit adjustments, we have to communicate our changes to the WIC Processor.

Click the Send eWIC Data button.

<Waiting>

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

End Adjust

We always want to look for the green banner after communicating with the WIC Processor.

Our HH EBT Balance has been recalculated.

There are now 0 cans of Elecare and 5 cans of Neocate on the WIC Card.

Notice that the original formula issued continues to display.

This is because Bud was still issued 1 can of Elecare.

We need to note this because it impacts our Food Prescriptions, as we'll see in a minute.

First, let's review our Benefits History.

<no audio> Open Benefits History.

<Waiting>

<screen description – no audio> Spin icon displays.

<Transition Slide>

<screen description – no audio> Slide transitions to all benefit sets expanded.

We're just going to toggle the benefit sets on behind the scenes.

Benefits History 1

Reviewing the adjustment, we can see all the food items were voided for September.

Collapse the September Benefits card.

Benefits History 2

And all were voided for August.

Collapse the August Benefits card.

Benefits History 3

We Issued 5 cans of Neocate for the prorated July benefit set.

Notice that the "Three Fourth" proration continues to display for these benefits.

Collapse this **Issuance** card for July, then click below the scroll bar.

Benefits History 3A

<no audio> Collapse this **Issuance** card for July, then click below the scroll bar.

Benefits History 4

As we learned previously, if we hover over the Status for the 4 cans of Elecare originally issued to the WIC Card, we can see the entirety of what we recovered and returned in a tooltip.

Go ahead and do that.

Click the button to continue.

Benefits History 5

For the Direct Shipped portion of the July benefits, 1 can was returned.

Next, let's go to Food Prescription.

<no audio> Open Food Prescription.

<Waiting>

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

<Transition Slide>

There are five rules in WINNIE that govern what happens to our Food Prescriptions after adjusting benefits.

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

Food Rx Rule 1

Rule #1: Existing Food Prescriptions with an Effective Date **before** the **first** FDTU of the most recently issued sets are left as-is.

So, if these were Bud's Food Prescriptions before we adjusted his benefits, those with an Effective Date prior to 8/4 are left as-is.

Click the button when ready to continue.

Food Rx Rule 2

Rule #2: Existing Food Prescriptions with an Effective Date that is the same as the FDTU of an adjusted benefit set are updated to reflect the modified food items and their amounts issued.

For Bud, none of these matches the 8/4 FDTU of the adjusted set, so rule #2 does not apply.

Click the button when ready to continue.

Food Rx Rule 3

Rule #3: Existing Food Prescriptions with an Effective Date that do **not** match the FDTU of any adjusted benefit sets but fall on or before the last issued set's LDTU, are left as-is and no changes are made to them.

Although this does not impact Bud, this is the rule that sets our best practice to always, always verify the food prescription after adjusting benefits.

Click the button when ready to continue.

Food Rx Rule 4

Rule #4: Existing Food Prescriptions with an Effective Date **after** the last issued set's LDTU are **deleted.**

Since we voided the August and September benefits, Bud's last issued set's LDTU is 8/15.

So, for Bud's food prescriptions, both the 9/15 9-month and the 12/15 child food packages were deleted.

Click the button when ready to continue.

Food Rx Rule 5

Rule #5: New food prescriptions will be created with an Effective Date matching the FDTU of the adjusted benefit sets.

As we adjust benefits, we'll take a look at the Food Prescription afterwards and apply these rules.

Click the button when ready to continue.

<Transition Slide>

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

Food Prescription 1

Per Rule #5, when benefits are adjusted, a food prescription is created for each set of benefits "re-issued" from the Adjust Benefits page.

Since we "issued" new formula today, August 4th, a new food prescription for the food items included in **that** benefit set was created.

Go ahead and expand the 8/4/2023 food prescription.

Food Prescription 2

Although this accurately reflects the food items we provided today, which was 1 can of Elecare, 5 cans of Neocate, only 24 ounces of infant fruits and vegetables due to proration, and infant cereal, this is **not** what we want to issue for the August benefits that we voided and need to reissue in Issue Benefits.

So, we need to create a **new** food prescription.

Click the Add Food Prescription button.

Food Prescription 4

The Effective Date of this food prescription should be his August PFDTU, which is 8/16.

Go ahead and select the 16th from the calendar dropdown.

<no audio> Select August 16th from the calendar dropdown.

Food Prescription 5

<no audio> Select August 16th from the calendar dropdown.

Food Prescription 6

Go ahead and create a default food prescription for Neocate and infant foods. Click anywhere for a hint.

<no audio> Create a default food prescription. Click anywhere for a hint.

<audio – hint> Click the Use Default button.

Food Prescription 7

<no audio> Create a default food prescription. Click anywhere for a hint.

<audio – hint> We want to issue infant foods. Click the No button.

Food Prescription 8

<no audio> Create a default food prescription. Click anywhere for a hint.

<audio – hint> Click the Food Item dropdown.

Food Prescription 8A

<no audio> Create a default food prescription. Click anywhere for a hint.

<audio – hint> Select Neocate Infant with DHA & ARA (14.1 oz. pwd).

Food Prescription 9

<no audio> Create a default food prescription. Click anywhere for a hint.

<audio – hint> We want to use the existing special prescription. Click the Yes button.

Food Prescription 10

WINNIE recognizes we've already created a Special Prescription in Adjust Benefits and makes that same information available when creating Food Prescriptions.

Click below the scroll bar then click the Save button.

Food Prescription 11

<no audio> Click the Save button.

<Waiting>

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

Food Prescription 12

OK. We now have an appropriate food package for our August reissuance.

Go ahead and collapse the August 16th food prescription card.

Food Prescription 13

Due to Rule #4, the 9-month food prescription was deleted because its Effective Date of 9/15 was after the LDTU of the adjusted set, which was 8/15.

We need to add that food prescription in order to reissue the September benefits.

Since our focus is Adjust Benefits, click the Add Food Prescription button, and we'll add that behind the scenes…

<Transition Slide>

<screen description – no audio> Slide transitions to page with new Food Prescription for 9/15/23.

Food Prescription 14

We are ready to issue those August and September benefits.

Open Issue Benefits.

Issue Benefits 1

We're reissuing August and September but not issuing October since Bud is scheduled for a midcert.

Go ahead and issue benefits. Click anywhere for a hint.

<no audio> Issue August and September benefits. Click anywhere for a hint.

> WIC STAFF: We'll just reissue August and September since Bud has a midcert scheduled for October.

<audio – hint> Toggle off the 10/16/23-/11/15/23 benefit set.

Issue Benefits 2

Click below the scroll bar.

Issue Benefits 3

<audio - hint> Click the Issue Benefits button.

Issue Benefits 4

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

<Waiting>

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

End Issue Benefits

<audio - hint> Click the Close button.

Demographics

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or false?

Adjust Benefits assesses proration and displays Available cans accordingly.

Answer #1

The answer is False.

Adjust Benefits displays whether the current set was prorated but does not consider proration when displaying the Maximum or Available number of cans.

Multiple Choice Q#2

Which statement is true?

A. We should always issue the number of cans the system suggests in the Available column.

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

C. Special Prescription Item information first entered into Adjust Benefits will have to be entered again when a new Food Prescription is created for the same formula.

D. A new food prescription is created for every set of benefits issued from Adjust Benefits.

E. The Recovered column is the number of unopened cans brought back to the clinic to exchange.

Answer #2

The answer is D.

A new food prescription is created for every set of benefits issued from Adjust Benefits. It will exactly replicate the food package issued for each benefit set with an Effective Date of the First Date to Use for the current set and the Printed First Date to Use, or first date of their cycle, for future sets.

Explanation for Other Answers:

A – Since WINNIE does not assess for proration, we are responsible for ensuring the original number of cans issued is maintained despite the number of cans the system displays in the Available column.

B – The Returned column is the number of unopened cans brought back to the clinic to exchange.

C – Special Prescription Item information entered for the first time in Adjust Benefits will automatically display for any future food prescriptions that are created in the folder.

E – The Recovered column is the number of cans we want to take off, or remove from, the WIC Card.

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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