

# Issue Benefits 3B – Direct Ship – 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 a continued overview of direct ship in WINNIE, the MN WIC Information System.

### Date

All dates in this module are based on today's date being September 26, 2023.

### <Transition Slide>

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

### Overview 1

Let's continue our review of Direct Ship.

In this module, we're going to look at direct shipping a partial benefit set.

### Overview 2

We can also direct ship formula we have on-hand, which can occur if we order ahead of time and a participant's formula changes.

### Overview 3

Per Federal Regulations and MOM Policy, we can never direct ship formula returned to our clinic by participants.

Returned formula must be disposed of, or in the case of Contract Formula only, it can also be donated.

### Scenario 1

We are working with the Bull family.

Their cycle is the 28<sup>th</sup> to the 27<sup>th</sup> and Adora missed August and has not yet received her September benefits.

She was certified as pregnant in July but came in today with her baby.

Go ahead and click on Noel's card.

WIC STAFF: Hi! Welcome to WIC! Who's this little guy?

PARTICIPANT: "This is Noel. He decided to come early."

## Scenario 2

Adora had her baby early and called a week ago to add Noel to the program but missed her appointment.

She's had formula on-hand from the hospital but is getting low.

She's already turned in the paperwork for Enfacare, which her baby has been using since he was born and is wondering if we can see her today.

So, Noel has already been prescreened but not certified.

Let's click on Terry's card.

PARTICIPANT: "I had Noel early so I called a week or so ago to add baby Noel but missed my appointment."

PARTICIPANT: "We've had sample formula from the hospital but I'm getting low. We already turned in the paperwork to get Encacare, which we've been using since he was born. Do you think we could be seen today?"

WIC STAFF: Absolutely. I'm glad you stopped by.

## Scenario 3

Terry was also certified in July, missed August, and hasn't received September yet.

Double-click on Adora's card.

## <Waiting>

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

## Alert 1

The first alert, with Benefit Issuance as its subject, is informing us that Mom's appointment was on 9/22 and that we should direct ship the 10 cans of Enfacare on-hand, which we'll plan on doing.

Since neither of these things will be relevant after we issue benefits today, let's delete this alert.

Go ahead. Click anywhere for hints.

<no audio> Delete the Benefit Issuance alert. Click anywhere for hints.

<audio – hint> Click the Delete button in the header under "User Alerts".

## Alert 2

<no audio> Delete the Benefit Issuance alert. Click anywhere for hints.

<audio – hint> Click the Yes button.

## Alert 3

The second alert is the Enfacare approval through December, which is still pertinent, so we'll leave it.

Close the alert.

## <Transition Slide>

Since our focus is issuing benefits, we are going to do most of the certification of Adora and Noel behind the scenes.

<screen description – no audio> Slide transitions to Noel's food prescription page in Certification Mode.

## Finish Cert 1

OK. We've verified Terry's food package, certified Adora, and have completed the cert requirements for Noel, who is Food Package III and high risk.

Go ahead and finish Noel's cert by opening Issue Benefits. Click anywhere for hints.

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

## <Waiting>

<screen description – no audio> Spin icon displays.

## Finish Cert 2

<no audio> Finish Noel's cert by opening Issue Benefits. Click anywhere for hints.

<audio – hint> Click the OK button.

### Finish Cert 3

<no audio> Finish Noel's cert by opening Issue Benefits. Click anywhere for hints.

<audio – hint> Click the Save Signature button or press the Enter key on the keyboard.

<Waiting>

<screen description – no audio> Spin icon displays.

### Finish Cert 4

<no audio> Finish Noel's cert by opening Issue Benefits. Click anywhere for hints.

<audio – hint> Click the Save Signature button or press the Enter key on the keyboard.

<Waiting>

<screen description – no audio> Spin icon displays.

<Waiting>

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

### Finish Cert 5

<no audio> Finish Noel's cert by opening Issue Benefits. Click anywhere for hints.

<audio – hint> Click the PFDTU dropdown.

### Finish Cert 6

<no audio> Finish Noel's cert by opening Issue Benefits. Click anywhere for hints.

<audio – hint> We want late issuance for August for Adora. Select 8/28/2023.

### Finish Cert 7

<no audio> Finish Noel's cert by opening Issue Benefits. Click anywhere for hints.

<audio – hint> Click the OK button.

<Waiting>

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

## Direct Ship 1

Adora, now certified as non-breastfeeding has her prorated August, and September and October benefits.

As does Terry.

Go ahead and collapse Adora's then Terry's benefit card.

## Direct Ship 2

<no audio> Collapse Adora's then Terry's benefit card.

## Direct Ship 3

We've mentioned multiple times now that any sets with a PFDTU in the same month are considered one month of benefits.

This applies to direct ship as well.

## Direct Ship 4

We have 10 cans and mom has only 2 days to purchase the formula with the 9/26-9/27 benefits.

So, it makes sense to direct ship the partial package using the cans we have available at our clinic.

Go ahead and toggle on Direct Ship for the partial package.

## Direct Ship 5

That leaves us with 5 cans, which we are going to issue using Direct Ship for the 9/28-10/27 benefits.

Go ahead and toggle on Direct Ship for the 9/28-10/27 benefit set.

## Direct Ship 6

To keep Noel in sync with Adora and Terry, we will keep the November set toggled off.

Click below the scroll bar.

## Direct Ship 7

Go ahead and direct ship the 5 cans for this set. Click anywhere for a hint.

<audio – hint> Click the Ship To dropdown.

## Direct Ship 8

<no audio> Direct Ship 5 cans for the 9/26-9/27 benefit period. Click anywhere for a hint.

<audio – hint> Select In Stock.

## Direct Ship 9

<no audio> Direct Ship 5 cans for the 9/26-9/27 benefit period. Click anywhere for a hint.

<audio – hint> Click or tab into the Direct Ship Quantity field.

## Direct Ship 10

<no audio> Direct Ship 5 cans for the 9/26-9/27 benefit period. Click anywhere for a hint.

<audio – hint> Type 5 into the Direct Ship Quantity field.

## Direct Ship 11

Since we toggled on the second benefit period, Issue Benefits is still disabled but the Next button is enabled.

Click the Next button.

## Direct Ship 12

We can move between the two benefit periods using the Previous and Next buttons.

We use the same process for direct shipping a partial amount of formula, except we don't enter the Total Quantity into the Direct Ship Quantity field; we enter an amount less than the total quantity.

Go ahead and complete the direct ship for this benefit set. Click for hints.

<audio – hint> Click the Ship To dropdown.

## Direct Ship 13

<no audio> Complete the direct ship for this benefit period. Click anywhere for hints.

<audio – hint> Select In Stock.

## Direct Ship 14

<no audio> Complete the direct ship for this benefit period. Click anywhere for hints

<audio – hint> Click or tab into the Direct Ship Quantity field.

## Direct Ship 15

<no audio> Complete the direct ship for this benefit period. Click anywhere for hints.

<audio – hint> Type 5 into the Direct Ship Quantity field.

## Direct Ship 16

The Issue Benefits button is now enabled. Go ahead and issue the benefits.

<no audio> Issue the Issue Benefits button.

## <Waiting>

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

## Direct Ship 17

No formula found in the partial package, as expected.

Click below the scroll bar.

## Direct Ship 18

The 5 cans not direct shipped are found in the full September package.

Again, as expected.

Click below the scroll bar again.

## Direct Ship 19

And, 10 cans as expected for October.

Click the Send eWIC Data button.

## <Waiting>

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

## Account Balance 1

This time let's generate the Account Balance.

Go ahead. Click anywhere for a hint.

<audio – hint> Click the Close button.

## <Waiting>

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

## Account Balance 2

<no audio> Generate the Account Balance. Click anywhere for a hint.

<audio – hint> Click the Participant Menu.

## Account Balance 3

<no audio> Generate the Account Balance. Click anywhere for a hint.

<audio – hint> Select Generate Account Balance.

## <Transition Slide>

<screen description – no audio> Slide transitions to Account Balance.

## Account Balance 4

Click below the scroll bar when ready to continue.

## Account Balance 5

Click the button when ready to continue.

## Test Your Knowledge

### T/F Q#1

True or False?

We can only direct ship medical formulas.

### Answer #1

The answer is False.

Although medical formulas are most often direct shipped since they can be harder to find in stores, contract formula can also be direct shipped if shortages are occurring, or participants are unable to find them in stores.

### Multiple Choice Q#2 (single answer)

Multiple Choice – select the correct answer.



Which statement is NOT true?

- A. Direct shipped benefits do not display on the Account Balance or Shopping List.
- B. We can direct ship two sets of benefits as long as the PFDTU of both sets is in the same month.
- C. Direct shipped benefits are not sent to the electronic benefit account at the WIC Processor.
- D. To direct ship a partial benefit set, we enter a quantity less than the total quantity being issued for that benefit set.
- E. When selecting an option from the Ship To dropdown, we always want to select an option that auto-populates an address.

## Answer #2

The answer is E.

We should always select “In Stock” from the Ship To dropdown; that is the one option that does **not** auto-populate an address.

## 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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