

## Change Household ID – Create New Household

### Intro

This HuBERT on-demand training module...

### Intro1

...is provided by the MN Department of Health WIC Program. It provides an overview of how to change the Household ID by creating a new household.

### Overview

There are a few instances whereby we may need to move a participant from one household to another: foster care, if a participant dies, or if a participant was inadvertently added to the incorrect household.

Remember, the State WIC ID never changes but the Household ID can.

The Change Household ID Guided Script allows us to do this.

### Foster Care

Participants on WIC may be in and out of foster care.

As best practice, if mom is part of the household, the children should always be moved to a new household if they enter foster care. In other words, Mom should always keep the original Household ID.

Children with the same foster parents should only have the same Household ID if they are siblings.

This means that a foster mom may have multiple WIC Cards to manage.

### Scenario

Today is January 30<sup>th</sup>.

Bea and Arya are being temporarily moved to foster care and their foster mother has come to the WIC Clinic to get a WIC Card.

Go ahead and look at the show details panel for Arya, Bea then Mama.

<no audio – failure hint> Click on **Bea's row** to view her Show Details panel.

<no audio – failure hint> Click on **Mama's row** to view her Show Details panel.

## Scenario 1

We can see that all have received benefits for December, January and February and their cycle is the 21<sup>st</sup> to the 20<sup>th</sup>.

Mama still has her own benefits on their WIC Card and will receive another set for March.

Go ahead and open **Bea's folder** by double-clicking on her row.

## Alert

The alert indicates that some formula has been bought but none has been given to the foster mom.

We're going to address the information provided in the alert now so go ahead and delete it.

## Open Trans Hx

As always, regardless of what the alert indicated, we should verify redemption. Go ahead and do that.

<no audio – failure hint> Click the **Benefit Management** menu.

<no audio – failure hint> Select **View EBT Transaction History**.

## Trans Hx

Let's type the January PFDTU, which is the 21<sup>st</sup> into the Start Date field then click the **Redemption Activity** radio button.

<no audio> Type 1/21/20 into the Start Date field then click the Redemption Activity radio button.

## Search Trans Hx

And search.

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

One redemption record. Double-click to view it.

<no audio> Double-click the **redemption record** to view the details.

## Trans Hx Details

It appears that 9 cans of formula have been purchased.

Go ahead and click the Close buttons to exit these screens.

<no audio – failure hint> Click the **Close** button.

## Close Trans Hx

<no audio – failure hint> Click the **Close** button.

## Open Ben Hx

Let's see what was originally issued to Bea. Open Benefits Hx.

<no audio – failure hint> Click the **Benefits History** tab.

## Benefits Hx

We'll expand the nodes...

So that we can see that 10 cans of powdered Similac Advance were actually issued for January and February.

OK. Since Bea is entering foster care, we need to remove her from the household her mother is currently a part of and assign a new household.

We do this using the Change Household ID Guided Script.

This function is found in the Participant Activities menu. Go ahead and click to open the menu.

<no audio> Click the **Participant Activities** menu.

And select **Change Household ID**.

<no audio> Select **Change Household ID**.

## Change HHID GS

This is the EBT Household Change Guided Script and there are a couple of very important things we need to note about it.

## Transition Slide

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## Important

First. Once the Guided Script is started, it **must be completed** before exiting.

This means if we can't finish it, we shouldn't start it.

Second, there are 5 steps and those steps **must be completed in the order they are displayed**.

Third, once a step is opened, it **must be completed before closing** the step.

Each step is locked once we close it and it cannot be re-opened to modify or correct any of its information.

Lastly, do not void existing benefits or deactivate WIC Cards before changing the Household ID. These functions are performed as part of the Change Household ID Guided Script.

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### Guided Script

OK. We have 5 steps and we now know that must be completed in order.

So, let's start with Step 1: Determine New Household.

<no audio> Click the **Determine New Household** link.

### New HH

The Change Household ID window displays Bea's current household information.

We have two options: we can add Bea to an existing household or we create a new one.

Since Bea is a new foster child, she must go into a new household.

<no audio> Click the **Create New Household** button.

### Create New HH

The Create New Household screen is very similar to a prescreen where we assigned Bea's original household ID and the same fields are required.

### Create New HH 1

We'll quickly complete these fields, starting with Bea's foster parent's address...

Bea's foster parent's mail address...

And her foster mother's name.

Although the Relationship isn't required, best practice is to select one. Go ahead and select the appropriate relationship.

<no audio – failure hint> Click the **Relationship** drop-down.

<no audio – failure hint> Select **Foster Parent**.

### Heard about WIC

**How Heard about WIC** is also required. Click the drop-down.

<no audio – failure hint> Click the **How Heard about WIC** drop-down.

### Heard about WIC 1

<no audio> Click below the scroll bar.

Since we don't know what Bea's mom originally selected, let's just select what makes the most sense: Participated Previously.

<no audio> Select **Participated Previously**.

### Telephone

And although the telephone number isn't required by the system, we always collect it if available.

The last required field is a new field: **Reason for ID Change**.

Go ahead and click the drop-down.

<no audio> Click the **Reason for ID Change** drop-down.

### Reason

It has three options: Custody Change, which occurs with foster care situations, Correct Data Entry Error, which we would choose if we had accidentally added Bea to the incorrect household, and Other (explain in notes), which we would choose in instances where the participant has died or any other situations that may require a household ID change. If we were to select this option, a note **is required** to explain the change in household ID.

Go ahead and select **Custody Change**.

<no audio> Select **Custody Change**.

### Save New HH

Once we close this step, we can't update any of this information until we exit the guided script, so we want to make sure there weren't any mistakes. We're good.

Click the OK button to finish creating the new household.

<no audio> Click OK or press the Enter key.

### View ID Hx

The current household information with Bea's new household ID and foster parent's address and telephone now display.

The only buttons enabled are to View ID Change History and close this window.

Let's check out the View ID Change History.

<no audio> Click the **View ID Change History** button.

### View ID Hx 1

It simply displays the date of the change, the old Household ID, the new Household ID and the reason we selected for the change.

Click to close this window.

<no audio> Click Close or press the Enter key.

### Close New HH

There is nothing else to do in this step. Go ahead and close it.

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

### Step 2

Once a step has been completed, a checkmark displays just like the other Guided Scripts.

Second step. Remove Current Benefits.

<no audio> Click the **Remove Current Benefits** link.

### Void/Replace

The Void/Replace Benefits for EBT Account screen displays.

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### Background

Let's talk a little background...

When we issue foods, they are issued to an account associated with a household ID, which is maintained by the WIC Processor. Although we use verbiage such as issue to the WIC Card, what we really do is issue to the household account.

The WIC Card is assigned to a household and is the method by which the participant or proxy accesses the foods in their household account.

This is why when we deactivate a card the foods and PIN automatically transfer to the replacement card. The foods and PIN always remain with the household. The new card is the assigned to the household, which once again allows them access to the household account.

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## Grids

Above the grid is Bea's original household ID along with the household's primary card holder.

The grid is simply a view-only list of the household members and representatives.

It also displays the current WIC Card number.

The Benefits for Current Month grid displays Bea's foods, the amount originally provided, the amount that hasn't yet been purchased, the amount brought back to the WIC clinic (which only applies to formula), and the Unit of Measure or how the food is packaged.

The Benefits to Remove for Current Month is the remaining amount available for transfer to the new household, which in this case, is one can of formula.

## Alert 1

Remember, when we opened Bea's folder, the alert that displayed indicated Mom had bought some of the formula and hadn't given it to the foster mom.

If we ask the foster mom if this is still true, and she indicates it is...

## Reissue Set

...we have a way to ensure Bea is provided the foods we issued to her for this month.

The Reissue a Full Set of Benefits function works as long as ALL the foods have not been redeemed.

## Transition

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## Reissue Message

We can use the Reissue a Full Set of Benefits function as long as at least **one food item** has not been redeemed for that member of the household.

But, if **every single food item** has been redeemed, instead of the Void/Replace screen displaying, a message that reads "There are no benefits eligible to be removed. Click OK to continue and void future benefits only or click Cancel to return without voiding benefits" displays instead.

If this message displays, the only thing we can do is click OK and continue with the Guided Script.

## Reissue Work-Around

For children, if all food items originally issued to them have been redeemed for the current month, there is nothing we can do to reissue the food package.

For infants or children issued formula, if all of their food items have been redeemed, a cheat sheet is available. This is a work-around that can be performed BEFORE starting the Change Household ID Guided Script, which emphasizes the importance of checking both redemption and Benefits history prior to starting the Change Household ID process.

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## Reissue Set 1

However, we were fortunate in this instance since mom only bought 9 instead of the full 10 cans, which means we can use Reissue a Full Set of Benefits.

Go ahead and click the checkbox.

<no audio> Click the **Reissue a Full Set of Benefits** checkbox.

This enables the Package Size radio buttons, allowing us to issue a prorated food package if that was what was originally issued.

A full set was originally issued so that is what we will reissue now.

Even if no changes were made to this screen, we must click the **Send EBT Data** button to complete it.

Go ahead and do that.

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

<cursor spins>

## Step 3

Our third step is remove cards. As we will see, this is a poorly named step because what we are actually doing is removing **the participant** from the household account. Click this link.

<no audio> Click the **Remove Cards** link.

<cursor spins>

## Remove Cards

The EBT Household Demographics screen opens with information for the household we are removing Bea from.



## Deactivate

If we were returning Bea to her original household after being in foster care, and there weren't any other members left in the household, we would want to deactivate the card.

But there are still other members in this household who are using this card so we'll simply Send EBT Data to complete the screen.

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

## Send EBT Data

<no audio> Click OK or press the Enter key on the keyboard.

## Cursor

<cursor spins>

## Step 4

Step 4. Review New EBT Household Demographics. Click the link.

<no audio> Click the **Review New EBT Household Demographics** link.

## Assign PCH

The second EBT household Demographics screen to open is for Bea's **new** household.

Bea is the only member and the system has auto-populated the authorized representative we entered into Step 1 when we created the household.

Since it's a new household, we have to set a Primary Cardholder and assign a card.

Which means we'll need to enter Ma Foster's date of birth.

Go ahead and set Ma as the Primary Card Holder.

<no audio – failure hint> Click the Authorized Representative row.

## PCH DOB

<no audio> Click inside the Date of Birth field.

<no audio> Type the DOB then click the next button you need to click.

<no audio – failure hint> Click the **Update** button.

## Set PCH

<no audio – failure hint> Click the **Set as Primary** button.

### **PIN Info**

Remember, we need the zip code and Ma's date of birth so that we can help her set her PIN.

### **Assign Card**

OK. Assign the card.

<no audio – failure hint> Click the **Assign Card** button.

### **Card Number**

And manually enter the card number. (Card # 6107270000043917)

<no audio – failure hint> Manually type the card #: 6107270000043917

<no audio – failure hint> Click OK or press the Enter key on the keyboard.

### **Send EBT Data 1**

To complete this screen, we have to....What? Go ahead and finish this step.

<no audio – failure hint> Click the **Send EBT Data** button.

### **Capture Sig**

<no audio – failure hint> Click **OK** or press the Enter key on the keyboard.

<no audio – failure hint> Click the **Capture Electronic Signature** button or press the Enter key on the keyboard.

<no audio – failure hint> Click the **Save Signature** button.

### **Completed Steps Msg**

Before we hit Step 5, remember when we first started the Guided Script we mentioned that each step is locked once close and cannot be re-opened?

Go ahead and click on any of the steps that currently has a checkmark.

<no audio> Click any of the steps that currently have a checkmark.

This message will display every time.

Click OK.

<no audio> Click OK or press the Enter key on the keyboard.

## Step 5

Step 5. Add Benefits to New Household.

<no audio> Click the **Add Benefits to New Household** link.

## Reissue Checkbox

The Food Prescription screen opens because we selected the **Reissue a Full Set of Benefits** checkbox in Step 2.

## Food Rx

This allows us to assess whether any adjustments need to be made to the food package before we reissue it.

Her food package is fine, so we simply click Close.

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

## Direct Ship

Since we are reissuing a formula, the Direct Shipped Benefit Items screen displays, since we could potentially need to direct ship this reissued food item.

It functions exactly the same as anywhere else we might see it when issuing benefits. <add checkmark and In Stock selection to screen for this sentence>

We don't need to direct-ship it so we can just click the **Finish** button.

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

## Aggregated

The last screen is the Aggregated Issuance for EBT Account screen that allows us to re-issue the benefits to Bea's new household.

It is only going to issue the current set of benefits.

Go ahead and finish it up.

<no audio – failure hint> Click the **Send EBT Data** button.

## Cursor

<cursor spins>

## Exit Step 5

And click Close to exit.

<no audio > Click the **Close** button or press the Enter key on the keyboard.

## Future Voided Msg

This message reads: Future benefits were voided. Click Issue Benefits from the participant folder to reissue future benefits.

Meaning the system automatically removed Bea’s future benefits from her old household’s account.

Go ahead and click OK.

<no audio> Click OK or press the Enter key on the keyboard.

## Close GS

And were done!

Let’s just take a sec to notice the household ID on Bea’s participant folder before we close the Guided Script, which is 13594044.

And once we close it...

<no audio> Click the Close button.

## HHID on Card

...it is updated to the new household ID 13672744.

We’ll just write her new household ID on the back of the card.

## Ben Hx After

OK. In Benefit’s History, if we expand the nodes...

We can see that the one can left for January has been voided, 10 new cans have been issued, and the February benefits have been voided.

Let’s exit out of Bea’s participant folder.

<no audio> Click the **Close Participant Folder** icon.

## Search Screen

We need to reissue Bea's February benefits, but first we will want to move her sister, Arya, to the same household. We'll continue working with the Free family in the next module: Change Household ID – Find Existing Household.

## Transition

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## End

Thank you for reviewing this HuBERT on-demand training module presented by the MN Department of Health WIC Program.