Direct Ship – Adding Formula

Intro

This HuBERT on-demand training module…

Intro1

…is provided by the MN Department of Health WIC Program. It provides an overview of adding more formula when the initial issuance was Direct Ship.

Review

A quick reminder about what Direct Ship is….

It allows us to provide, and record in HuBERT, issuance of medical formulas not readily available in stores.

The formula is ordered from the State office by our agency and provided directly to the participant at the WIC clinic.

Redemption is performed automatically by the system and occurs on the date of the PFDTU.

Because of this, there are no transaction records since vendors do not redeem direct ship formulas.

Question

The question this module addresses is: if less than the maximum amount of formula was issued and the participant requires more formula, how do we add more formula when the initial issuance was direct shipped?

Scenario

So here's our scenario.

Today is January 13th.

Corey Ander is a mostly-breastfed infant who was issued 4 cans of a medical formula for December, January and February.

Scenario 1

Mom is no longer breastfeeding as regularly and would like to receive the maximum amount of formula we can provide.

She has talked to our RD about receiving more formula, which has been ordered from the state office for this month, and the next month, so that she doesn't have to come back to WIC until March.

Go ahead and open Corey's participant folder.

<no audio – hint after 5 seconds> Double-click on **Corey's row** in the Participant List or click the **Open Participant Folder** icon.

Cursor

<cursor spins>

PF

Since we will be changing Corey's breastfeeding status from Mostly to Some in order to provide more formula, we will need to assess whether mom has had any redemptions.

Remember, redemption for Corey's current benefits was automatically performed by the system on this month's PFDTU, January 8th.

Go ahead and check if mom has redeemed anything yet.

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

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

<cursor spins>

Cycle Start Date

<no audio> Their cycle is the 8th to the 7th.

<no audio>Type the first date of their January cycle into the **Start Date** field then select the **Transaction Type**.

Search

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

<cursor spins>

Verify Purchase

<no audio> Double-click to view the purchase.

Purchase

Mom has purchased some milk. Go ahead and click the Close buttons to exit out of the Transaction History.

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

Close Trans Hx

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

Open Ben Hx

Let's take a look at what was issued to Corey.

<no audio> Click the **Benefits History** tab.

Benefits Hx

We'll expand the nodes…

…and we can see that for January and February 4 containers of PKU Periflex Early Years were Direct Shipped.

Next, go ahead and change Corey's breastfeeding amount to some-bf.

<no audio – failure hint> Click the **Health Information** tab.

Health Info

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

Some-BF

<no audio – failure hint> Select **Some-Breastfeeding.**

BF Verified

When we change the breastfeeding amount, we have to also update what?

<no audio> Use the drop-down calendar.

<no audio – failure hint> Click the **Date Breastfeeding Verified** drop-down.

Verified Today

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

FPIII Verified

Because Corey is receiving medical formula and is food package III, what else do we have to update?

<no audio> Use the drop-down calendar.

<no audio – failure hint> Click the Date **Food Package III Verified** drop-down.

FP Verified Today

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

Open FP Tab

Next, let's take a look at the Food Prescription tab, which will prompt the messages to save our changes and auto-update the food packages. Click through the messages as appropriate.

<no audio> Click the **Food Prescription** tab to prompt saving our changes and creation of the new food package.

Save HI

<no audio – failure hint> Click **Yes** or press the Enter key.

Update Fd Rx Msg

<no audio – failure hint> Click the **Yes** button

Cursor

<cursor spins>

Select Formula

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

Cursor

<cursor spins>

Select Formula

We'll just quickly scroll…

Scroll Formula

<display> Scrolls down through special formula list.

Select Special Formula

Go ahead and select the appropriate formula and continue.

<no audio – failure hint> Select **PKU Periflex Early Years.**

<no audio – failure hint> Click OK or press Enter.

Use Existing Rx

<no audio – failure hint> Yes. We want to use the existing food prescription.

6 Month Msg

This message displays because before Corey's special prescription expires in April, he will be more than 6 months old and the system wants to know if it should remove the solid foods for the 6 to 8 month age category.

We don't know this yet and the RD didn't mention anything, so we are going to click No at this time. We can always make this change later.

Continue…

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

Update Mom DFP

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

Food Rx Tab

We'll expand the nodes…

Since we are providing medical formula, the default amounts are the max allowed for the breastfeeding amount and age category.

OK. So our food prescriptions are set and now we need to add more formula via direct ship. Well, we know how to add more formula so let's get that started. Go ahead.

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

Open FAW

<no audio – failure hint> Select **Food Adjustment Wizard**.

Cursor

<cursor spins>

FAW

<no audio – failure hint> Click the **Add More Formula** radio button.

Add More

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

Cursor

<cursor spins>

Add Formula

First, let's notice that there is no indication that the cans already issued were direct-shipped.

Second, there is no way to indicate that we need to direct ship the additional cans.

No Direct-Ship

This is because when we add more formula, the system makes the assumption that we want to issue it in the same way it was originally issued.

In general, this works.

It Works

Since we only direct-ship medical formula, we can assume that if the formula was direct-shipped it is because it isn't readily available in stores and is therefore, ordered from the State. If we add more, the same process will be used to provide it.

Transition Slide

<transition>

Two-step Process

There is a two-step process that can be followed to add more formula to the WIC Card if the initial issuance was via direct-ship. However, since this may occur and only rarely, we won't review how to do it here. Step-by-step instructions are provided in the Direct Ship – Adding More Formula cheat sheet available on the MDH WIC website.

Transition Slide

<transition>

Add January

Go ahead and type the quantities into the Additional Cans cells, starting with January.

<no audio – failure hint> Click inside the **Additional Cans** cell in the January row.

Add January 1

<no audio – failure hint> Click inside the **Additional Cans** cell again.

Add January 2

<no audio> Double-click to highlight the zero.

Add January 3

<no audio> Type 5 then click into the cell below.

Add February 1

<no audio – failure hint> Click inside the **Additional Cans** cell again.

Add February 2

<no audio> Double-click to highlight the zero.

Add Feb Cans

<no audio> Type 6 then click the **OK** button.

Cursor

<cursor spins>

Formula Added Msg

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

Cursor

<cursor spins>

Open Ben Hx 1

Let's take a look at the issuance again.

Ben Hx 1

And we'll expand the nodes…

January has a total of 9 direct-shipped cans of formula, all of which have been automatically redeemed by the system since the PFDTU was on January 8th.

February has a total of 10 direct-shipped cans of formula, all of which will automatically redeem on February 8th.

Direct-Ship

And in clinic, we will provide mom with the 11 cans of formula the RD had ordered from the State.

Close Infant PF

Our next step is to adjust mom's food package. Go ahead and close Corey's folder.

<no audio – hint after 5 seconds> Click the **X** in the top right corner or **the Close Participant Folder** icon.

Mom's Details

Let's take a look at mom's details.

<no audio – failure hint> Click on **MAMA ANDERS' row** to highlight.

Open Mom's PF

Mama also received December, January and February benefits. She has a midcert due in April but we'll see both mom and Corey together in June or July, when Corey is 9 months old.

OK. We're ready to proceed. Double-click to open mom's participant folder.

<no audio > Double-click on **MAMA ANDERS' row** to open her Participant Folder.

<cursor spins>

Mom's PF

We know from earlier that mom has a redemption already for this month.

This means that we can't do anything with mom's current set of benefits and can only void her future set for February.

Open Ben Man

Let's do that. Go ahead.

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

FAW 1

<no audio – failure hint> Select **Food Adjustment Wizard**.

Cursor

<cursor spins>

Void Future

<no audio – failure hint> Click the **Void Future Benefits** radio button.

Void Future 1

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

<cursor spins>

Void February

<no audio – failure hint> Click the **Selected checkbox** to void February benefits.

Void Send Data

<no audio – failure hint> Click the **Send EBT Data** button or press the Enter key.

Void Success

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

Open Mom's Ben Hx

And let's verify our void in benefits history.

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

Mom's Ben Hx

Click the plus next to the February set to verify the void.

<no audio – failure hint> Click the plus next to the February set.

Feb Voided

Yep. Voided.

Before issuing we need to ensure the food package is OK with mom. Where do we go next?

<no audio – failure hint> Click the **Food Prescription** tab.

Mom's FP

Mom is fine with the default food package.

Let's re-issue mom's February benefits to the WIC Card.

Go ahead.

<no audio – failure hint> Click the **Issue Benefits** icon.

Cursor

<cursor spins>

Issue Benefits

The RD had only ordered formula for Corey through February and we don't yet have cans ordered, or available to provide, for March.

We need to reissue mom's February benefits and want to keep the family in sync.

Go ahead and do what needs to be done, starting with Corey's then Mama's suggested benefits.

<no audio – failure hint> Click the **March benefits checkbox** for Corey to de-select it.

Remove March

<no audio – failure hint> Click the **March benefits checkbox** for Mama to de-select it.

Issue

<no audio – failure hint> Click the **Issue Benefits for Selected Members** button.

Send EBT Benefits

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

<no audio> Print an account balance.

<no audio – hint after 5 seconds>This screen does not automatically close. Click the Close button or the X to exit.

Print Acct Bal

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

Select Acct Bal

<no audio – failure hint> Select **Print EBT Account Balance**.

Cursor

<cursor spins>

Print

<no audio – failure hint> Click the **Send to Printer** radio button.

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

Account Balance

Only mom's foods display since Corey's formula was direct-shipped.

And only mom's foods will display in the app.

<no audio> Click when ready to continue.

End

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