

Direct Ship - Introduction

Introduction

This HuBERT on-demand training module...

Overview

... is provided by the MN Department of Health WIC Program. It provides an overview of issuing Direct Ship Formula.

Issuing Direct Ship Formula

Definition

Direct ship allows issuance of formula not readily available in stores.

It is ordered by our local agency from the State Office, who ships it to our agency so that we can provide the formula directly to the participant at our WIC Clinic.

Scenario

Today is August 7th and Sue Shee's mom is here to pick up formula.

Go ahead and open her folder.

<no audio – hint after 7 seconds> Click the Open Participant Folder icon or double-click Sue Shee's row in the participant list.

Alert

According to the alert, Sue receives her formula directly from us every month. She is receiving only infant f/v and the RD will update the food prescription next month if appropriate.

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

CPA Review

Sue isn't due for her MCA until the end of the month so we'll be scheduling both mom and Sue's MCAs for next month.

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

PF

Since Sue is receiving a special formula, what should we do first? Go ahead.

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

HI

Mom is still breastfeeding at night.

Go ahead and update the required fields using the drop-down calendars.

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

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

HI 1

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

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

HI2

Next, let's verify the food package.

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

Save HI

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

FP

Infant fruits and vegetables and formula. Good to go. Let's issue her formula.

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

BI

All formulas have a Direct Ship indicator in the Issue Benefits screen.

To indicate we are **providing the formula directly to the participant at the clinic**, we simply select the Direct Ship checkbox.

Go ahead and direct-ship the formula for Sue's August benefits and issue.

<no audio – failure hint> Click the **Direct Ship checkbox**.

BI 1

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

DS

A **Direct Shipped Benefit Items** screen will display for each set of benefits issued using Direct Ship.

The **Direct Ship this Item** checkbox is default-selected and disabled since we already indicated this is a Direct Ship item when issuing the benefits.

However, we are not shipping the formula anywhere, we have it in stock in our clinic.

So, we always select the **In Stock** radio button. Go ahead and do that.

<no audio> Click the **In Stock** radio button.

DS 1

Notice the **Ship to Address** section has been cleared.

The Order section displays the PFDTU and LDTU of the benefit set being direct-shipped, the formula description, and the number of cans being issued.

We do not use the **Print Order** or **Print Receipt** functions, so we can just ignore these checkboxes.

Last step is to click the **Finish** button.

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

Aggregated

The **Aggregated Issuance for EBT Account** screen opens and displays the food items that will be issued to the WIC Card, which in this case is just the jars of infant fruits/vegetables.

Go ahead and finish issuing the benefits and then display the shopping list on the screen.

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

Print

<no audio – failure hint> Click the **Print Shopping List** button.

Display

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

Shopping List

The Shopping List also only displays those food items issued to the WIC Card.

Let's take a look at Benefits History next.

<no audio> Click when ready to continue.

Aggregated 1

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

Open Ben Hx

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

Ben Hx

Open the nodes for the first row of benefits by clicking on the plus signs.

<no audio – failure hint> Click the plus next to the first row of benefits.

<no audio – failure hint> Click the plus next to the benefit serial number.

We can see that a benefit serial number is assigned, it is labeled as Direct Shipped, and that the quantity and type of formula is listed.

Go ahead and open the nodes for the next row of August benefits.

<no audio – failure hint> Click the plus next to the second row of August benefits.

<no audio – failure hint> Click the plus next to the benefit serial number 35736519.

The infant fruits and vegetables are assigned a different benefit number.

Ben Hx 1

<pause>

Now let's open the Benefit Details for the direct-shipped benefit. Go ahead.

<no audio – failure hint> Click the benefit serial number **35736520** to highlight it and enable the Show Details button.

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

Show Details

Although we previously said the Paid Date cannot be relied upon because of the potential for multiple purchases or redemptions for the same benefit number, there is only one redemption with direct-shipped formula and that's when we provide it to the participant at our WIC clinic.

Show Details 1

So for direct-shipped formula it is reliable. And it is the Printed First Date to Use that is automatically inserted by the system for the Paid Date once the date of the PFDTU is reached. If it is late issuance, and the PFDTU is in the past, then the issued date is automatically inserted by the system.

Since the PFDTU is 8/3 and the benefits were issued on 8/7, their status is Paid and their Paid Date is the issued date of 8/7.

Close Show Details

Use the Close button to exit this screen.

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

<Transition Slide>

Ben Hx 2

The Direct Shipped benefit has a paid date, do you think it has a redemption record? Where do we go to check? Go ahead.

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

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

Trans Hx

Since it would have been redeemed today, change the Start Date to today's date and check for a redemption.

<no audio – failure hint> Click the **Start Date** drop-down calendar.

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

<no audio – failure hint> Click the **Redemption Activity** radio button.

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

Trans Hx 1

No records.

Basically, redemption means a purchase was made at a store, or vendor, and communicated to the WIC Processor.

And direct-shipped benefits aren't redeemed by a vendor.

<Transition Slide>

Scenario 2

Let's try another scenario.

Today is August 7th.

Sallie Mander is a high-risk child whose last issuance was for July.

She is currently on monthly issuance.

Scenario 2A

According to mom, she spoke with our RD, Jane Doe, at the end of July. Mom had informed Jane that the pharmacy she goes to would start carrying Sallie's medical formula starting in October. Mom then told us that because of this, the RD told **her** we'd order formula for both August and September and that the formula for October would be issued to her WIC Card as well when she came in in August.

Scenario 2B

Also, the doctor should have emailed a new medical form over that added cheese and yogurt back to the WIC-allowed foods to be issued.

Lastly, she would like a printed shopping list because her phone can't download the app because it's too old.

Scenario 2C

Go ahead and open Sallie's folder.

Alert 1

We are in luck. Jane has written an alert that reiterates everything mom just told us.

Read the alert and continue opening the folder.

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

To Do List

So. Here's what we need to do:

We need to update her food package III date in Health Information;

add cheese and yogurt to her food package;

change her issuance from monthly to tri-monthly;

direct ship her August and September benefits;

and issue October benefits to her WIC Card.

Lastly, we'll print the shopping list.

Go ahead and complete everything on the list in the order it's listed. If you get stuck, click anywhere on the screen and a hint will display.

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

FPIII Date

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

FPIII Date 1

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

FPIII Date 2

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

Save

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

New FP

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

DFP

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

No Milk

<no audio – failure hint> Click the **Milk** row to highlight it.

No Milk 1

<no audio – failure hint> Click the **Delete Food Item** button..

No Milk 2

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

Add Formula

<no audio – failure hint> We still need to add the formula to the new food package. Click the **Add Food Item** button.

Add Formula 1

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

Add Formula 2

<no audio – failure hint> Select **FORMULA**.

Add Formula 3

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

Add Formula 4

<screen description> Scrolling to formula...

Add Formula 5

<screen description> Scrolling to formula...

Add Formula 6

<no audio – failure hint> Select **PurAmino DHA ARA (14.1 oz pwd)**.

Add Formula 7

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

Rx Msg

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

Save FP

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

Iss Freq

<no audio – failure hint> Click the **Participant Activities** menu.

Iss Freq 1

<no audio – failure hint> Select **Review CPA-determined Follow-up Information**.

Iss Freq 2

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

Iss Freq 3

<no audio – failure hint> Select **Tri-Monthly**.

Iss Freq 4

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

Issue

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

DS

<no audio – failure hint> Click the **Direct Ship checkbox** next to the August benefits.

DS 1

<no audio – failure hint> Click the **Direct Ship checkbox** next to the September benefits.

Issue 1

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

DS 2

<no audio – failure hint> Click the **In Stock** radio button.

DS 3

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

DS 4

<no audio> Remember, this screen displays for each set of direct-shipped benefits.

<no audio – failure hint> Click the **In Stock** radio button.

DS 5

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

Issue 2

<no audio> On screen: Verify the food packages are correct. Start at the top and click below the scroll bars to view the food packages for each month.

<no audio – failure hint> Click below the scroll bar for the August benefits.

Issue 3

<no audio> On screen: Verify the food packages are correct. Start at the top and click below the scroll bars to view the food packages for each month.

<no audio – failure hint> Click below the scroll bar for the September benefits.

Issue 4

<no audio> On screen: Verify the food packages are correct. Start at the top and click below the scroll bars to view the food packages for each month.

<no audio – failure hint> Click below the scroll bar for the October benefits.

Issue 5

<no audio> On screen: Verify the food packages are correct. Start at the top and click below the scroll bars to view the food packages for each month.

<no audio – failure hint> Click below the scroll bar for the October benefits again.

Issue to Card

<no audio – failure hint> Click the **Send EBT Data** button to issue the benefits to the WIC Card.

Print List

<no audio – failure hint> Click the **Print Shopping List** button.

Print List 1

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

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

List

Well done.

Notice the direct-shipped formula is not listed for August or September (because it was not issued to the WIC Card) and is listed for October as we would expect.

Go ahead and finish.

<no audio> Click when ready to continue.

Exit Agg

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

Open Ben Hx 1

Let's take a look at Benefits History.

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

Ben Hx 3

<screen shifts up>

Ben Hx 4

Go ahead and open the first August node and look at Show Details.

<no audio – failure hint> Click the + next to the first 08/13/2019 – 09/12/2019 row.

<no audio – failure hint> Click benefit serial number 35736525 to highlight it and enable the **Show Details** button.

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

Show Details 1

Since we issued the direct-ship benefits for August early, on August 7th when Sallie’s cycle starts on the 13th, the status is Issued instead of Paid and the Paid Date is N/A.

The system will automatically update these fields come August 13th.

End

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