

## Introduction

### Intro

This HuBERT on-demand training module ...

### Intro1

... is provided by the MN Department of Health WIC Program. It provides an overview of the WIC Card.

## The WIC Card

### WIC Card

The WIC Card is what our participants use to purchase food items that have been issued to all members of their household.

Each household is assigned one card and all MN WIC Cards begin with the digits 610727.

### WIC Card Back - HHID

The back of the card is where we should be able to find the Household ID since it should be written on the back with a permanent marker when the card is first assigned to the household.

### WIC Card Back – Acct Bal

It also provides participants with information about how to check their account balance, including the My MN WIC App, the web portal at [wiccard.mn.gov](http://wiccard.mn.gov), and the customer service telephone number as well as...

### WIC Card Back - Reminders

...important card reminders including: not writing the PIN on the card, keeping it for future benefits since benefits are added to the same card each time benefits are issued, and using it first before other forms of payment.

## EBT Household Demographics

### Ben Man Menu

All functions associated with the WIC Card can be found in the Benefit Management menu in a participant's folder.

<no audio> Click the **Benefit Management** menu.

We're going to start with the **EBT Household Demographics** screen.

Besides the menu option, we can access this screen from the AdditionalInfo2 tab...

<no audio> Click the **AdditionalInfo2** tab.

## AddInfo2

...with a button in the Authorized Representative section...

## CGS

...as well as a link in the Certification (and Mid-Certification Assessment) Guided scripts.

## Open EBT HH Demo

Go ahead and open the EBT Household Demographics screen using the menu option.

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

<no audio – failure hint> Select **EBT Household Demographics**.

## EBT HH Demo 1

We saw the EBT Household Demographics screen earlier when it automatically displayed when performing in-state transfers.

It functions to communicate telephone, address and clinic changes to the WIC Processor.

It is also where we set the household's primary card holder, assign WIC Cards, Reset Bad Pin Counts and deactivate WIC cards.

Since we only assign one card per household, we won't use the Set as Secondary or Account Status, which is typically used to disable one card when multiple cards have been issued to a household.

## EBT HH Demo 2

Lastly, this is where we can add, alter or delete a household's authorized and alternate representatives...

## AddInfo2 1

...which display in the AdditionalInfo2 tab. Hence, the EBT Household Demographics button on this tab.

## Authorized & Alternate Reps

### Auth Rep

An Authorized Representative for the household is usually added during Prescreen and is most often the Primary Card Holder.

It's typically the mother if she is on WIC and part of the household.

Otherwise, it should be the primary caregiver.

If an Authorized Rep isn't listed in the EBT Household Representatives grid, the Add Auth Rep button is enabled. Otherwise, it is disabled.

### Reps

A household can have a total of three representatives: one authorized and two alternate representatives, also known as *proxies*.

### Proxies

Proxies are other people known to the household whom the Authorized Representative can entrust use of the WIC Card to purchase foods...

### Proxies

...and to come to the WIC Clinic to receive nutrition and food benefits for the household.

### Reps 1

Since we can have two proxies, let's add another Alternate Rep by clicking the Add Alt Rep/Proxy button.

<no audio> Click the **Add Alt Rep/Proxy** button.

The space below the grid fills with the new fields and an Update and Delete button now display.

We click the **Update** button when adding or changing information for a rep.

For Representatives, only the Last Name and First Name are required.

### LN Character Limit

We need to note that the Last Name fields for all representatives have a 20-character limit. This is usually a sufficient length except for some hyphenated names. If a rep has a hyphenated name that is more than 20 characters long, we will need to ask them which name they would prefer we use.

OK. So, we are going to add Honey Jarr as another rep.

<no audio> Type: Jarr and press the Tab key on the keyboard.

## Reps 2

<no audio> Type: Honey and click the Update button.

## Reps 3

If we want to update information for our rep, we need to select the row in the grid to highlight it.

<no audio> Click on Honey Jarr's row.

Let's add Honey's relationship to the household. Again, we are going to choose whatever best characterizes the representative's relationship to a CHILD in the household, even if there isn't yet a child in the household.

In this case, Honey is a friend of the family.

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

<no audio> Select **Family Friend**.

## Reps 4

Again, to save any changes, we must click the **Update** button.

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

Although we updated this information, it does not display in the grid. But, once we've saved it to HuBERT, we already know it will display in...

## AddInfo2 2

...the Demographics AdditionalInfo2 tab.

## PCS Msg

Any time we make changes to representative information, we must communicate the changes to the eWIC Processor, which also saves it to HuBERT.

We do this by clicking the **Send EBT Data** button. <mouse>

However, when we open the EBT HH Demographics screen via the participant folder, as opposed to it opening as part of the transfer process, HuBERT performs a validation to ensure a primary cardholder has been assigned.

## Set as Primary

### Set Primary

For all households new to WIC, and existing households that don't have a WIC Card, we will need to set a Primary Card Holder and assign a card.

The Primary Card Holder is the participant, parent or guardian present at the appointment to whom the WIC card is issued.

When setting the PIN or using Customer Service, it is the Primary Card Holder's Date of Birth that is used, along with the household's mail zip code, to validate the card user.

### Set Primary 1

The Primary Card Holder should **always** be one of the representatives and is usually going to be the Authorized Representative.

We do NOT want to select rows that begin with State WIC IDs as this may result in errors when sending the EBT Data.

### Set Primary 2

We are going to set our Authorized Representative as the Primary cardholder. And to do that, we must first click on that row to highlight it.

<no audio> Click on the Authorized Representative row.

We also need to fill in their date of birth since this will be used as validation when setting the PIN and accessing Customer Service.

If we click the button before entering the birth date <pause for click>, a message displays indicating it is required.

For existing households new to eWIC, we can often find the authorized representative already listed and can easily complete their date of birth.

### Set Primary 3

If they aren't listed there, or for new households, we will need to ask the Primary Card Holder for their birth date, explaining that their birth date, along with the household's mail zip code, is needed to verify their identity as a primary card holder.

Remember, we will need to click update to save the birth date.

<no audio> Type in Mama Bear's birth date and click the **Update** button.

## Set Primary 4

Then, we just click the **Set as Primary** button to set the Authorized Rep as the Primary Card Holder.

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

Three things happen on the screen: The Primary Cardholder displays at the top, the Set as Primary button is disabled, and Primary displays in the Card Holder column for the Authorized Rep.

Now that we have a Primary Card Holder, we could send our EBT data.

But let's do the next step first, which is to assign the WIC Card.

<FADE OUT>

## Assign Card

### Assigning a WIC Card

All HuBERT users should have a card reader attached via a USB.

The magnetic strip is inserted into the card reader with the front of the card, or the numbers, facing the green light when swiping.

We can manually enter the card number but swiping ensures that the correct number is entered and is definitely faster.

### Assign Card 1

One of our responsibilities will be to help the Primary Card Holder set their PIN before leaving the clinic with their WIC Card.

There are two pieces of information we will need in order to help set their PIN. Can you remember what they are? Starting at the top of the screen, click the two things we'll need.

### Assign Card 2

Yep. Let's write them down. The Primary Card Holder's Date of Birth and the household's mail zip code.

Now let's assign the card.

### Secondary

We want to make sure the Primary Cardholder row is still highlighted.

If we accidentally click on another row...

### Secondary1

...and assign the card...

### Secondary2

The system automatically assigns the card to the highlighted row, which in this case, is not our primary card holder.

It also automatically assigns this person as the secondary card holder, which is not something we do in MN eWIC.

So, If this occurs, simply click the **Exit** button and click NO on the “Do you want to save...” message.

### Secondary 3

This will close the screen, deleting any changes we may have made.

Which means we will have to re-open the EBT Household Demographics...

### Secondary 4

...and start all over assigning the primary card holder and issuing the card.

### Assign Card 1A

OK. Back to assigning our card, where we have the correct row, the Primary Card Holder row, highlighted.

<no audio> Click the **Assign Card** button.

### Assign Card 1B

We are going to swipe the card <pause for card number> and click OK.

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

### Assign Card 1C

The number displays in the Card Number column for the Authorized Rep.

### Send EBT Data

The last step is to communicate all of our changes to the EBT Processor: the addition of the alternate rep 2, the Primary Cardholder and the assigned card number.

There are two steps to sending EBT Data. The first is successful communication of the changes with the EBT Processor. The second is to save the changes to the HuBERT database.

We do this by clicking the **Send EBT Data** button.

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

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

### Don't Click X to Close

When a card is assigned, the Primary Card Holder must sign for it. This is why the Primary Card Holder is the participant, parent or guardian who is **at the WIC appointment**.

If we are unable to capture the electronic signature due to not having a functioning signature pad, or some other reason...

...we do NOT click the X to close the Capture Signature for Card window.

### <Transition Slide>

#### Don't Click X to Close 1

The reason for this is that if the X is used to close the Capture Signature for Card window, a signature record will **not** be created.

Since a signature record is used as validation for the My MN WIC App, if no signature record exists, the household will be unable to see their benefits in the app.

#### No Signature

So, if we are unable to collect a signature, what do you think we do in this screen? Go ahead and do it.

<no audio – failure hint> If unable to collect a signature, we should click the **CLOSE** button to exit the **Capture Signature for Card** window.

#### No Signature Register

According to policy, we are required to capture the Primary Card Holder's signature when we issue a WIC Card. To do this, we would use the WIC Card – Primary Cardholder Signature Register to manually record the Household ID, Card #, Name, Issue Date, Reason and signature.

This form then has to be scanned into each household members' folders.

#### WIC Tools

This form will be available on the WIC Tools page of the MDH WIC website. The WIC Tools link is found on the right navigation bar on all Information for Local Agencies web pages...

<no audio> Click the **WIC Tools (Forms)** link.



### WIC Tools 1

...and is found in the **HuBERT Forms – Local Agency Staff** section.

<no audio> Click the **HuBERT Forms – Local Agency Staff** link.

### WIC Tools 2

<no audio> Click below the scroll bar.

### WIC Tools 3

<no audio> Click when ready to continue.

### Capture Signature

But, we do have a functioning sig pad, so let's collect the Primary Cardholder's signature.

Just like when collecting signatures at the end of the CGS, we click the **Capture Electronic Signature** button.

<no audio> Click the **Capture Electronic Signature** button.

<pause for signature collection screens>

### Capture Signature A

And click the **Save Signature** button.

<no audio> Click the **Save Signature** button.

### Capture Signature1

HuBERT automatically exits the EBT Household Demographics screen once the signature has been collected...

### Capture Signature2

<no audio> Returns to Demographics.

**End**

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