

Adjust Benefits 1H – Direct Ship Scenario 2 WINNIE Online Training Module

AUGUST 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is a review of how to issue to the WIC Card in Adjust Benefits when original issuance was by Direct Ship in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being August 18, 2023.

Direct Ship Scenario 2

Scenario Overview

The scenario for this module is: an infant was issued medical formula by Direct Ship but is now using a different formula.

This new formula can be issued to the WIC Card.

August benefits were issued by direct ship and September and October to the WIC Card.

Scenario 1

Ferris Wheele is a 1-month old Food Package III infant for whom we've received a new Medical Documentation form requesting we provide Neocate Infant formula for 3 months.

His doctor is Sawyer Bones and it's approved through October 31st.

Scenario 2

His foster father has brought back 5 cans of Elecare that were direct shipped so that we can exchange them for his new formula, which we'll issue to his WIC Card.

Since the formula was direct shipped and his Printed First Date to Use (or PFDTU) is in the past, we have to adjust the benefits.

Ferris is food package III. What do we need to do before adjusting benefits? Go ahead. Click anywhere for a hint.

<no audio> What do we need to do for a Food Package III infant before opening Adjust Benefits? Click anywhere for a hint.

<audio – hint> We have to update the Food Package III Verified Date. Select Health Information from the sidebar.

PARTICIPANT: “I’ve brought back 5 cans of the Elecare to exchange.”

WIC STAFF: That’s great! We’ll be issuing the new formula to your WIC Card this time.

WIC STAFF: Since it was direct shipped and his PFDTU is in the past, we’ll have to use Adjust Benefits.

<Waiting>

<screen description – no audio> Spin icon displays.

Health Information 1

<no audio> What do we need to do for a Food Package III infant before opening Adjust Benefits? Click anywhere for a hint.

<audio – hint> Click the calendar control in the Food Package III Verified Date field.

Health Information 2

<no audio> What do we need to do for a Food Package III infant before opening Adjust Benefits? Click anywhere for a hint.

<audio – hint> Select today’s date, August 18th.

Health Information 3

<no audio> What do we need to do for a Food Package III infant before opening Adjust Benefits? Click anywhere for a hint.

<audio – hint> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

Health Information 4

Go ahead and open Adjust Benefits.

<Waiting>

<screen description – no audio> Spin icon and “Working...please wait” display.

Direct Ship 1

When benefits have been direct shipped, and the PFDTU is in the past, the Void toggle is automatically disabled.

Direct Ship 2

The DS Amount Issued column displays the number of cans direct shipped.

Again, since the PFDTU is in the past, all cans are redeemed.

Direct Ship 3

Since 5 unopened cans of Elecare are being exchanged, as always, we return first in order to make formula available.

Return 1

Once again, we know how to do this.

Go ahead and return his 5 cans then add the new formula, Neocate Infant with DHA & ARA. Double-click and type into any fields and follow any cues that display. Click anywhere for hints.

<no audio> Return 5 cans and add Neocate Infant with DHA & ARA. Double-clicking and typing values into fields. Click anywhere for a hint.

<audio – hint> Double-click into the Returned field in the Formula cans row.

Return 2

<no audio> Return 5 cans and add Neocate Infant with DHA & ARA. Double-clicking and typing values into fields and following any cues that display. Click anywhere for a hint.

<audio – hint> We are returning 5 cans. Type 5.

Return 3

<no audio> Return 5 cans and add Neocate Infant with DHA & ARA. Double-clicking and typing values into fields and following any cues that display. Click anywhere for a hint.

<audio – hint> Press the Tab key or click somewhere on the page.

Add Formula 1

<no audio> Return 5 cans and add Neocate Infant with DHA & ARA. Double-clicking and typing values into fields and following any cues that display. Click anywhere for a hint.

<audio – hint> Click the Add Formula Item button.

Add Formula 2

<no audio> Return 5 cans and add Neocate Infant with DHA & ARA. Double-clicking and typing values into fields and following any cues that display. Click anywhere for a hint.

<audio – hint> Click the Food Item dropdown.

Add Formula 3

<no audio> Return 5 cans and add Neocate Infant with DHA & ARA. Double-clicking and typing values into fields and following any cues that display. Click anywhere for a hint.

<audio – hint> Select Neocate Infant with DHA & ARA (14.1 oz pwd).

Add Formula 4

Complete the Special Prescription Item card following the cues provided.

<no audio> Return 5 cans and add Neocate Infant with DHA & ARA. Double-clicking and typing values into fields and following any cues that display. Click anywhere for a hint.

<no audio - cue> Click into field and type date.

<screen description – no audio> Approved thru 10/31/23 – ST; Doctor: Sawyer Bones, Dr.

<audio – hint> Click into the End Date field.

Add Formula 5

<no audio> Return 5 cans and add Neocate Infant with DHA & ARA. Double-clicking and typing values into fields and following any cues that display. Click anywhere for a hint.

<no audio – cue> Click into field and type date.

<screen description – no audio> Approved thru 10/31/23 – ST; Doctor: Sawyer Bones, Dr.

<audio – hint> Type 10/31/23 into the End Date field.

Add Formula 6

<no audio> Return 5 cans and add Neocate Infant with DHA & ARA. Double-clicking and typing values into fields and following any cues that display. Click anywhere for a hint.

<no audio – cue> Click into field and type: Sawyer Bones, Dr.

<screen description – no audio> Approved thru 10/31/23 – ST; Doctor: Sawyer Bones, Dr.

<audio – hint> Click into the Physician’s Name field.

Add Formula 7

<no audio> Return 5 cans and add Neocate Infant with DHA & ARA. Double-clicking and typing values into fields and following any cues that display. Click anywhere for a hint.

<no audio – cue> Type exactly as shown with same punctuation and spacing, or module will not proceed.

<no audio – cue> Click into field and type: Sawyer Bones, Dr.

<screen description – no audio> Approved thru 10/31/23 – ST; Doctor: Sawyer Bones, Dr.

<audio – hint> The doctor’s name must be typed exactly, using the same spacing and punctuation.

Add Formula 8

<no audio> Return 5 cans and add Neocate Infant with DHA & ARA. Double-clicking and typing values into fields and following any cues that display. Click anywhere for a hint.

<audio – hint> Click the Reasons dropdown.

Add Formula 9

<no audio> Return 5 cans and add Neocate Infant with DHA & ARA. Double-clicking and typing values into fields and following any cues that display. Click anywhere for a hint.

<audio – hint> Select Medical Documentation.

Add Formula 10

<no audio> Return 5 cans and add Neocate Infant with DHA & ARA. Double-clicking and typing values into fields and following any cues that display. Click anywhere for a hint.

<no audio – cue> Red X over OK button in Special Rx card – DON’T NEED TO CLICK!

<no audio – cue> Double-click and type value.

<audio – hint> Double-click the Quantity.

Add Formula 11

<no audio> Return 5 cans and add Neocate Infant with DHA & ARA. Double-clicking and typing values into fields and following any cues that display. Click anywhere for a hint.

<no audio – cue> Double-click and type value.

<audio – hint> There are 5 cans available. Type 5.

Add Formula 12

<no audio> Return 5 cans and add Neocate Infant with DHA & ARA. Double-clicking and typing values into fields and following any cues that display. Click anywhere for a hint.

<audio – hint> Click the OK button next to the Cancel button. We don't have to click the OK in the Special Prescription Item card.

Able to DS 1

OK. A couple of things to note.

One. If we needed to direct ship this new formula, or part of it, we could do that.

Reconstituted Ounces 1

Two. Notice that our Maximum number of cans for the two formulas is different.

We would think because Ferris' foster dad returned 5 cans, leaving them with 4 of Elecare, that we would only be able to issue 4 cans of Neocate.

This is where our Reconstituted Ounces become impactful.

WIC STAFF: Hmm. I'm able to issue 9 total cans of formula even though Neocate says 8.

<Transition Slide>

<screen description – no audio> Slide transitions to topic slide.

Reconstituted Ounces 2

We mentioned when we first reviewed the formula grid in Adjust Benefits that the Reconstituted Ounces become important when we change formula because they are the limiting factor that determine the number of cans we can issue.

Using the MN WIC Formula Amounts Guide, available on the MDH WIC website, as our reference, we can see that our 1-month-old fully formula fed infant can receive a maximum of 870 reconstituted ounces of powdered formula per month through 3 months of age.

Reconstituted Ounces 3 – START HERE – SLIDE 36

Using the MN WIC **Medical** Formula Amounts Guide, we can see the allowed number of cans, based on age and breastfeeding amount, for each Medical Formula.

For Elecare, when mixed with water, it provides 95 oz per can.

The number of cans is determined by simple math and Federal Regulations.

For this participant, 870 ounces per month is the upper limit and we cannot exceed it.

Dividing our limit of 870 by 95, we get 9.16 cans, or 9 cans since we must always round down.

Reconstituted Ounces 4

For Neocate, 870 divided by 97 equals 8.96, or **8** cans since we must **always** round down.

Reconstituted Ounces 5

So, what about our current set of benefits where we issued 5 additional cans of Neocate?

Once again, it's a matter of math.

For Elecare, we issued 4 cans, which multiplied by 95 ounces is 380 reconstituted ounces.

If we subtract 380 from our limit of 870, we get 490.

Divide that by Neocate's 97 ounces per can and we get 5.05 cans, just as our Food Item Calculator displayed.

<Transition Slide>

<screen description – no audio> Slide transitions back to Adjust Benefits page.

Collapse 1

Moving on. Let's collapse this card and Update Future Months.

<no audio> Collapse this benefit set's card and click Update Future Months.

Update Future 1

<no audio> Collapse this benefit set's card and click Update Future Months.

<Waiting>

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

Validation 1

This time, we'll just talk through some of the validations.

There are checks-and-balances throughout Adjust Benefits.

For instance, this one that ensures the Returned amount is less than or equal to the Redemption, since they can't return any more than they've purchased.

Correct Returned 1

Let's correct our Returned value, double-clicking and typing the value. Click for a hint.

<audio – hint> Double-click into the Returned field in the Elecare formula cans row.

Correct Returned 2

<no audio> Correct the Returned value, double-clicking and typing the value. Click for a hint.

<audio – hint> We cannot return anything if there isn't any redemption. Type 0.

Correct Returned 3

<no audio> Correct the Returned value, double-clicking and typing the value. Click for a hint.

<audio – hint> Press the Tab key or click somewhere on the page.

Validation 2

The next validation displays because we have a value in the Additional Quantity when there isn't anything Available since nothing has been recovered and 9 cans are still issued.

The Available is 0 minus the amount in the Additional (5), which equals negative 5.

Correcting our Recovered amount will get rid of this validation.

Correct Recovered 1

Go ahead and do that. Double-click and type values. Click for hints.

<no audio> Correct the Recovered value, double-clicking and typing the value. Click for a hint.

<audio – hint> Double-click into the Returned field in the Elecare formula cans row.

Correct Recovered 2

<no audio> Correct the Recovered value, double-clicking and typing the value. Click for a hint.

<audio – hint> We want to recover the entire EBT Amount Issued. Type 9.

Correct Recovered 3

<no audio> Correct the Recovered value, double-clicking and typing the value. Click for a hint.

<audio – hint> Press the Tab key or click somewhere on the page.

Correct Additional 1

Now let's correct our Additional Quantity for Neocate.

<no audio> Correct the Additional Quantity, double-clicking and typing the value. Click for a hint.

<audio – hint> Double-click into the Addition Quantity field in the Neocate formula cans row.

Correct Additional 1

<no audio> Correct the Additional Quantity, double-clicking and typing the value. Click for a hint.

<audio – hint> We want to issue the maximum allowed. Type 8.

Correct Additional 3

<no audio> Correct the Additional Quantity, double-clicking and typing the value. Click for a hint.

<audio – hint> Press the Tab key or click somewhere on the page.

Communicate 1

We know we can rely on WINNIE to do the math and suggest the correct amounts, but it is our responsibility to be sure to communicate changes like this to our participants.

WIC STAFF: We can provide you with 8 cans of this formula...

Collapse 2

Go ahead and collapse this benefit set's card.

Update Future 2

We would have to return, recover, and add for this set as well, which we are going to do behind the scenes.

<Transition Slide>

<screen description – no audio> Slide transitions to third set with returned and recovered values updated.

Send Data 1

What if we forgot to add the additional 3 cans? That can happen; clinics are busy and distracting.

Go ahead and Send eWIC Data before adjusting the new formula.

WIC STAFF: I am **so** sorry! Will you please excuse for one moment?

<Waiting>

<screen description – no audio> Spin icon and “Working...please wait” display.

<Waiting>

<screen description – no audio> Spin icon and “Working...please wait” display.

Collapse 1

That’s one reason we always review our adjustments besides just being good practice.

Review the benefit sets, collapsing the current and first future set.

<no audio> Click below the scroll bar.

Forgot 2

Notice the buttons are disabled until we make some kind of change to the page.

If we forget to adjust something, or need to revise an adjustment, the page is ready for us to do that.

Go ahead and add the additional cans, double-clicking and typing the value then communicate the change to the WIC Processor. Click for hints.

<audio – hint> Double-click into the Additional Quantity field in the third benefit set’s formula cans row.

Forgot 3

<no audio> Add the additional cans, double-clicking and typing the value, then communicate the change to the WIC Processor. Click anywhere for hints.

<audio – hint> We want to issue the 3 cans available. Type 3.

Forgot 4

<no audio> Add the additional cans, double-clicking and typing the value, then communicate the change to the WIC Processor. Click anywhere for hints.

<audio – hint> Press the Tab key or click somewhere on the page.

Send Data 2

<no audio> Add the additional cans, double-clicking and typing the value, then communicate the change to the WIC Processor. Click anywhere for hints.

<audio – hint> Click the Send eWIC Data button.

<Waiting>

<screen description – no audio> Spin icon and “Working...please wait” display.

<Waiting>

<screen description – no audio> Spin icon and “Working...please wait” display.

End Adjust 1

Go ahead and click below the scroll bar.

End Adjust 2

We’re good to go.

Let’s open Benefits History.

<Waiting>

<screen description – no audio> Spin icon displays.

<Transition Slide>

As usual, we’ll toggle on the benefit sets behind the scenes...

Benefits History 1

Review each benefit set, collapsing the card indicated by the arrows.

Benefits History 2-7

<no audio> Review each benefit set, collapsing the card indicated by the arrows.

Food Prescription 1

Where do we always go after adjusting benefits? Go ahead. Click for a hint.

<no audio> We must always verify the Food Prescription after adjusting Benefits. Open Food Prescription.

<Waiting>

<screen description – no audio> Spin icon and “Working...please wait” display.

Food Prescription 2

We have 3 food prescriptions created by the system with Effective Dates that match the FDTUs of the adjusted benefit sets, and a future food prescription that was left as-is.

Let's take a look at the Food Prescription created for today. Go ahead and expand it.

Food Prescription 3

Today's food prescription reflects the issuance of both Elecare and Neocate for August.

Next, expand the September 13th food prescription.

<no audio> Expand the 9/13/23 food prescription.

Food Prescription 4

Since this food prescription no longer accurately reflects the formula issued, we can choose to delete it.

Let's do that. Go ahead. Click for a hint.

<audio – hint> Click the Delete button at the far right above the grid.

Food Prescription 5

<no audio> Expand the 9/13/23 prescription and do what should be done. Click anywhere for a hint.

<audio – hint> Click the Yes button.

Food Prescription 6

And as best practice dictates, let's take a look at the most future prescription.

<no audio> Expand the 10/3/23 food prescription.

Food Prescription 7

The October prescription looks just fine.

Although best practice is to add the deleted future food prescriptions for infants, well...here's the thing...we are banking on future adjustments not wiping them all out again, and our agency may decide it's better practice not to recreate them.

Click the button to continue.

Test Your Knowledge

Multiple Choice Q#1

What is the limiting factor that determines the number of cans we can issue?

- A. The number of returned + recovered cans.
- B. The total number of reconstituted ounces for any formulas being issued.
- C. The number of cans in the Maximum column.
- D. The total number of cans the participant/proxy brings in to exchange if originally direct shipped.
- E. The Age Category and Breastfeeding Amount.

Answer #1

The answer is B.

The total number of reconstituted ounces for any formulas being issued is **the** limiting factor. The total must be equal to or less than the criteria set by Federal Regs based on the infant's Age and Breastfeeding Amount.

True/False Q#2

We must always **round up** when determining the number of cans we can issue by calculating reconstituted ounces.

Answer #2

The answer is False.

We must always round down, no matter the decimal value (.16, .5, or .85 – all round down) when calculating reconstituted ounces. Luckily, the system will always do the math for us!

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.

ADJUST BENEFITS 1H – DIRECT SHIP SCENARIO 2

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