Adjust Benefits 2A – Food Scenario 1 - WINNIE Online Training Module

AUGUST 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It provides an overview of adjusting food items in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being August 11, 2023.

Overview 1

Adjust Benefits allows us to modify issued food items when redemption has already occurred for the current set of benefits.

As we'll see, for household members receiving the same food items (or formula items), the Household Balance and Redemption are calculated differently.

Food Scenario 1: Exchanging Milk for Soy Beverage

Scenario Overview

The following scenario will be started in this module and completed in the next.

We are going to provide soy beverage instead of milk for one member of a household in this module and correct the cash-value benefit (or CVB) for another member of the same household in the next module.

We need to note that at the time these training modules were created, the CVB amount was not static.

August and September benefits have been issued and redemption of milk, fruit and vegetables, and other food items has occurred.

<Transition Slide>

<screen description – no audio> Slide transitions from topic page to Demographics page.

Scenario 1

The Burr family, consisting of a pregnant mom, two children, and an infant were all issued benefits for August and September.

Barb is wondering if she can exchange her milk for soy beverage despite having already bought milk this month.

She also thinks the amount provided for her fruits and vegetables wasn't right because it seemed a little low.

> PARTICIPANT: "Hi! I'm wondering if I can still exchange my milk for soy beverage since I've already bought some milk this month."
>
> PARTICIPANT: "Also, I think the amount of money for fruits and vegetables isn't right. It just seems a little low."
>
> WIC STAFF: I'm glad you called! Let's see what we can do…

<Transition Slide>

If we were to view Transaction History, we would see…

<screen description – no audio> Slide transitions from Demographics page to Transaction History.

Transaction 1

…that some of the redeemed foods have been assigned to everybody.

Click the button to continue.

Transaction 2

Remember, eWIC redemption is randomly assigned to household members since all food items issued to a household are aggregated.

In this Transaction Details card, we want to note that Barb has 4.5 gallons of redeemed milk assigned to her.

Click the button to continue.

Transaction 3

Review the rest of the EBT Transaction Details, clicking the button to continue.

Transaction 4-5

<no audio> Review the rest of the EBT Transaction Details. Click the button to continue.

Adjust Benefits 1

Let's open Adjust Benefits.

<Waiting>

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

Adjust Benefits 2

Women and children issued foods also have a collapsed Formula Items grid in case they are Food Package III.

Only the food items issued to Barb, whose folder we are in, display in the Food Distribution Item column.

Food Distribution 1

The Food Distribution column displays the food item as it shows in the App, Account Balance, or Shopping List.

The Unit of Measure, often labeled UOM, is the size of 1 of those food items.

Max Amount 1

The Maximum Amount column displays the most she can be issued of that individual food item, which is based on her **current** WIC Category, current BF Amount if applicable, and if a child, her age category at the time of issuance.

Max Amount 2

Looking at the milk row, 5.50 gallons is the maximum amount of milk Barb **could** be issued if not receiving any other food items from the milk category, like cheese or yogurt.

Amt Issued 1

The Amount Issued column is the quantity provided to this particular member of the household.

Since Barb received 1 quart of yogurt and 1 pound of cheese, the equivalent of 1 gallon of milk, the amount of milk she was issued was 4.5 gallons.

HH Balance 1

The Household Balance is the sum of the amounts issued to the household minus any quantities purchased that are still available on the WIC Card.

Notice we didn't say Redemptions.

That's because when there are food items aggregated for the household, the Redemption column does not just reflect the quantity "purchased" according to the WIC Processor by the individual participant.

Redemption 1

Based on our transaction details from the WIC Processor, 4.5 gallons were redeemed from the foods issued to Barb.

We also mentioned this is random.

Redemption 2

If the Redemption column were to simply reflect redemption based on the WIC Processor's assignment of it, we would expect to see 4.5 for milk.

But that's not what we see because that's not how it works when more than one household member has been issued the same food item.

HH Balance 2

WINNIE accounts for the WIC Processor's random assignment of redemption by calculating a Redemption of 0 if the Amount Issued is **less than or equal to** the Household Balance.

This provides us with the flexibility to adjust benefits, despite redemption, if other household members have been issued the same food items.

Math 1

Let's apply the math.

For juice, Barb was issued 3 containers, which is equal to the household balance of 3, so Redemption is zero.

Math 2

For whole grains and yogurt, she was issued 1 whole grain item and 1 quart of yogurt, which is less than the 5 whole grain and 2 yogurt items left in the household balance, so the Redemption is zero.

Redemption 3

The second part of calculating redemption is if the Amount Issued is **greater than** the Household Balance, the Redemption is equal to the difference.

Math 3

Barb was issued 1 dozen eggs and there aren't any in the household balance, so 1 – 0 equals a Redemption of 1.

Math 4

For milk, she was issued 4.5 gallons, there are 4 left in the household balance, so 4.5 minus 4 equals a Redemption of .5.

We should note that if the same formula and/or infant foods were issued to more than one member of the household, such as with infant twins, Redemption would be calculated in this same way.

Math 5

Same math is applied for Cereal, Cheese, and Peanut Butter and Beans food items.

Click the button to continue.

Recovered 1

Recovered is the amount of the food item that we want to take off of the WIC Card.

Recovering a quantity is our first step towards adjusting food items.

In general, we need to take back in order to have something to give.

Recovered 1A

As long as the Amount Issued is less than or equal to the Household Balance, we can recover the entire Amount Issued.

Recovered 2

If the Amount Issued is greater than the Household Balance, we can only recover what's left in the Household Balance.

Exchange 1

Since Barb would like to exchange her milk for Soy Beverage, for the current month, we can only exchange 4 gallons and not the 4.5 that were issued.

Available 1

The Available column indicates the quantity that can be issued or added to the WIC Card.

Available 1A

In general, as long as a full package has been issued, nothing will be until something has been recovered.

Proration 1

We've said it before and it bears saying again, proration is not considered by the system when adjusting benefits, but it is our responsibility to ensure it is maintained.

Additional Qty 1

The Additional Quantity is the amount of the food item we want to issue to the WIC Card.

Exchange 2

Let's begin by recovering the milk on the WIC Card.

Double-click the Recovered field in the milk row.

Validation 1

If we were to enter a value greater than our recoverable amount, a validation message will display.

<no audio> This value cannot be greater than the Amount Issued or HH Balance.

Click the button to continue.

Exchange 3

Enter the quantity we want to recover and get the system to calculate. Click for hints.

<audio – hint> We are adding 4 gallons. Type 4.

Exchange 4

<no audio> Enter the quantity we want to recover and get the system to calculate. Click anywhere for a hint.

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

Add New 1

Remember, these columns remain static until we communicate with the WIC Processor.

However, the Available column updates to reflect the number recovered.

Our next step is to add the Soy Beverage.

Go ahead and do that. Click anywhere for hints.

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

<Waiting>

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

Add New 2

<no audio> Add the Soy Beverage. Click anywhere for hints.

<audio – hint> Click the Base Food Category dropdown.

Add New 3

Any food items the participant was not issued, but is eligible to receive, displays in the Base Food Category list.

Milk, since there are many options for milk that could still be issued; Cash Benefit due to there being multiple values available during this period of time; and Juice since she could receive the 64 oz containers instead of frozen.

Continue to add the Soy Beverage.

<no audio> Add the Soy Beverage. Click anywhere for hints.

<audio – hint> Select MILK.

Add New 4

<no audio> Add the Soy Beverage. Click anywhere for hints.

<audio – hint> Click the Food Item dropdown.

Add New 5

Only the milk options Barb is eligible to receive will display in the list.

Continue to add the Soy Beverage.

<no audio> Add the Soy Beverage. Click anywhere for hints.

<audio – hint> Select Soy Beverage.

Add New 6

The Unit of Measure for the Soy Beverage Food Item, which is different from the Food Distribution Item, is a quart and that's the equivalency the Food Calculator displays.

Add New 6A

The Maximum is the limit without receiving any other milk food items, and our quantity defaults to that maximum, resulting in a negative value for the amount remaining.

Whenever we have a negative value, we have to decrease our quantity.

Finish adding the Soy Beverage.

<no audio> Double-click and type the value.

<no audio> Add the Soy Beverage. Click anywhere for hints.

<audio – hint> Double-click into the Quantity field.

Add New 7

<no audio> Double-click and type the value.

<no audio> Add the Soy Beverage. Click anywhere for hints.

<audio – hint> We have to subtract 6 from our Allocated, so our Quantity is 16. Type 16.

Add New 8

<no audio> Add the Soy Beverage. Click anywhere for hints.

<audio – hint> Click the OK button.

Add New 9

The green row is always our new food item.

Notice that our value was converted from 16 quarts to 4 gallons and inserted into the Additional Qty field, and our Available is once again 0.

Collapse 1

Let's continue by adjusting the future benefits.

Go ahead and collapse the current benefits' card and click the Update Future Months function.

Update Future 1

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

\<Waiting\>

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

Update Future 2

Remember, the Update Future Months function exactly copies our adjustments to future benefits.

Our Recovered milk is 4, but our issued milk was 4.5, so we need to correct that.

Double-click into the field, enter the correct value, and get the system to calculate.

Update Future 3

\<no audio\> Double-click into the field, enter the correct value, and get the system to calculate.

\<audio – hint\> We want to recover what was issued so type 4.5.

Update Future 4

\<no audio\> Double-click into the field, enter the correct value, and get the system to calculate.

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

Update Future 5

Now have .5 gallons available of either milk or soy beverage.

Adjust our Additional Quantity.

\<no audio\> Double-click into the field, enter the correct value, and get the system to calculate.

\<audio – hint\> Double-click into the Soy Additional Quantity field.

Update Future 6

\<no audio\> Double-click into the field, enter the correct value, and get the system to calculate.

\<audio – hint\> We want to add what we recovered. Type 4.5.

Update Future 7

\<no audio\> Double-click into the field, enter the correct value, and get the system to calculate.

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

Collapse 2

Go ahead and collapse this card and communicate our changes to the WIC Processor.

<no audio> Collapse the September benefit set's card and communicate the changes to the WIC Processor.

Send Data 1

<no audio> Collapse the September benefit set's card and communicate the changes to the WIC Processor.

<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 3

Go ahead and collapse the current set to verify we have our green banner.

Question 1

OK. Moving on. Barb said that she thought her CVB amount might be low.

Answer the question then click the button to continue.

Which should we generate if we want to verify whether any individual members of the household were issued an incorrect CVB amount? Click the button to select an answer.

SHOPPING LIST – HOUSEHOLD

Correct. The Household Shopping List shows what each member of the household was issued.

ACCOUNT BALANCE

Incorrect. The Account Balance is an aggregated household list with the current balance.

End Scenario 1

We will continue adjusting this household's benefits in the next training module.

Click the button to continue.

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.

Minnesota Department of Health - WIC Program, 625 Robert St N, PO BOX 64975, ST PAUL MN 55164-0975; 1-800-657-3942, health.wic@state.mn.us, www.health.state.mn.us; to obtain this information in a different format, call: 1-800-657-3942.

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