

Deactivating WIC Cards & Card History – WINNIE Online Training Module

REVISION 2 – AUGUST 2024

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is an overview of deactivating WIC Cards and Card History in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being August 31, 2023.

Overview 1

In general, we should only deactivate WIC Cards when we need to remove access to the household account.

A couple examples of when this may be necessary include, but are not limited to, difficult foster care situations or if the card is in the possession of someone who should no longer have access.

Overview 2

<screen description – no audio> Same Info as Replace with button “Skip Repeat Information.”

Only the representatives listed in the eWIC Household Demographics page can request that we deactivate a WIC Card.

We should always verify their identity (if they're not known to staff).

If on phone, for verbal verification of identity, we can confirm their identity by making sure it matches the name of an adult participant or a representative (authorized or alternate).

We must also ask them to provide at least two of the following details: the Primary Cardholder's date of birth, the mailing address zip code, and/or the names of the household members participating in WIC.

Overview 3

Participants can also cancel their cards using the Customer Service Line.

If this occurs, we are not notified, but the deactivation and the reason why that they select in their system displays in WINNIE on the Card History page.

However, only WIC local agencies and their staff can replace the WIC Card.

Overview 4

If a card is deactivated, the PIN will not automatically transfer to the new card once it is assigned.

As with a new card, we should be sure to assist the family with setting a new PIN for their replacement card.

<Transition Slide>

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

Scenario

Scenario 1

Here is our scenario.

Jen Tulle has called because she had a “very serious” falling out with her brother who is an alternate representative and currently has her WIC Card.

She’s afraid he is going to the store right now to use the card and she is wondering if there is a way to make sure that he can’t.

While she is speaking, we multi-task to see if we can find her in the database by searching for the authorized representative and using part of her name.

Go ahead and search by Auth Rep, last name T-U-L, and first name Jen.

PARTICIPANT: “Hi! My name is Jen Tulle and my son gets WIC. I just had a very serious fight with my brother who helps me with my WIC and he has my card right now.”

PARTICIPANT: “I’m really afraid he’s going to the store right now to use it and I’m wondering if there’s a way to make sure he can’t use it...”

Auth Rep Search 1

<no audio> Search by Auth Rep, last name Tul, and first name Jen.

Show Details 1

Go ahead and toggle on Show Details then collapse the Search Criteria card.

Show Details 2

<no audio> Toggle on Show Details then collapse the Search Criteria card.

Verify Identity 1

We've already confirmed her name matches the Authorized Rep and she has provided one of the details we need in order to verbally validate her identity, the name of her son who is participating in WIC.

To complete the verbal identity validation, we asked her for her date of birth and jotted that down.

WIC STAFF: Can you tell me how you spell your last name as well as your son's name?

PARTICIPANT: "Watt, W-A-T-T and same last name Tulle."

WIC STAFF: I also need to double-check your date of birth, since you are the authorized rep for Watt.

PARTICIPANT: "Sure. It's 2/10/84."

Scenario 2

She also asked if it would be ok to stop by later today to get a new card.

We let her know how late we are open and that we can help make sure her brother won't be able to use her current card.

Go ahead and double-click to open Watt's folder.

<no audio> Double-click on Watt's card to open his Participant Folder.

PARTICIPANT: "Is it OK if I stop by later today to pick up a new card?"

WIC STAFF: Absolutely. You can just walk-in, and someone should be able to help you, but you might have to wait a few minutes. We're open until 4 today. We can also make sure your brother can't use your card right now.

<Waiting>

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

Deactivating the WIC Card

Deactivate 1

Where do we go to deactivate a card? Go ahead. Click anywhere for a hint.

<audio – hint> Select Manage eWIC Account on the sidebar.

Verify Identity 2

To complete validating Jen’s identity, we ensure the Authorized Rep’s date of birth matches what we jotted down.

Deactivate 2

We’re also going to jot down the card number.

We’re going to use it in a minute.

Deactivate 3

What do you think we need to do to enable the Deactivate Card button? Go ahead. Click for a hint.

<audio – hint> We must select the Primary Cardholder’s row. Click the Authorized Rep’s row.

Deactivate 4

Now that it’s enabled, click the Deactivate Card button.

<Waiting>

<screen description – no audio> Spin icon displays.

Deactivate 5

Deactivation is immediately and automatically communicated by the system to the WIC Processor and a green banner displays indicating this.

Deactivate Card is the only change on this page that does **not** require us to click the Send eWIC Data button to complete the change at the WIC Processor.

Deactivate 6

If the deactivated card is physically in-hand, we should use a permanent marker to render the household ID on its back illegible then just throw it away.

Deactivate 7

Once a card is deactivated, the number can no longer be used to access the household’s food benefits at the WIC Processor.

However, it is still associated with the household records in WINNIE.

Deactivate 8

Remember, nothing is stored on the actual card.

Food benefits are stored at the WIC Processor and the card is just the tool they use to access them.

Deactivating the card has no impact on their food benefits, it just doesn't allow a person to use the card to access them.

Updating the Alternate Representative

Alt Rep 1

Jen would like to replace her brother Ren with her sister Bea as an alternate rep.

Let's make that change now as well.

How do we edit a representative without using the Edit Representative button? Click anywhere for a hint.

<audio – hint> Double-click the Alternate Rep 1 row.

PARTICIPANT: "Can I remove my brother and add my sister, Bea, instead to help me with my WIC?"

WIC STAFF: Of course. Her name is B-E-A Tulle? We can do that now too.

PARTICIPANT: "Yep."

Alt Rep 2

Double-click on Ren, type Bea, and click Update.

<no audio> Double-click on Ren to highlight, type Bea, and click the Update button.

Alt Rep 3-4

<no audio> Double-click on Ren to highlight, type Bea, and click the Update button.

Alt Rep 5

Last step? Go ahead. Click anywhere for a hint.

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

<Waiting>

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

Using Deactivated Cards in Search

Card Number 1

We're going to grab that sticky with the deactivated card number and go back to the Search page for a minute.

<no audio> Select Search from the sidebar.

Card Number 2

Go ahead and clear the Search page.

<no audio> Click the Clear button.

Card Number 3

Now search by the Card Number, typing it into the field.

<screen description – no audio> Card #6107279300000618.

<no audio> Search by the card number.

Card Number 4-5

<screen description – no audio> Card #6107279300000618.

<no audio> Search by the card number.

Card Number 6

Since WINNIE maintains an historical record of the WIC Card, we are still able to search by deactivated cards.

Notice that there isn't anything on this page that lets us know the card has been deactivated.

We might wonder why we would need to look up a deactivated card?

Well, here's a scenario.

A family lost their card and called the Customer Service line and asked for it to be deactivated.

It was then found by a store and sent to us.

Since we can still search by its number, we are able to see who it belonged to and verify its current status, which we'll see in Card History in a few minutes.

<Transition Slide>

<screen description – no audio> Slide transitions to Search page,

Later that same day...

Jen has come to the clinic to get a new card and another staff person is helping her.

She tells us that someone helped her this morning and did something to her card so that it doesn't work anymore, which is why she is here to pick up a new one.

WIC STAFF: Welcome! What can I do for you today?

PARTICIPANT: "Hi. I spoke with someone this morning and she did something to my card so that it wouldn't work anymore, so I'm here to pick up a new one."

WIC STAFF: OK! Let's see how I can help.

<Transition Slide>

<screen description – no audio> Slide transitions to Show Details for Tulle, Watt.

Once we view Watt's details...

Scenario Continued

Priority Alert

...we can see a Priority Alert with the topic of WIC Card was written.

Double-click to open Watt's folder.

<no audio> Double-click on Watt's card to open his folder.

WIC STAFF (thought bubble): Nice! It looks like whoever helped her this morning wrote an alert about the card.

<Waiting>

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

Alert 1

We'll review the alert and then delete it since it will no longer apply after today.

Click the Delete button after reading the alert.

Alert 2

Click Yes, we are sure.

<no audio> Click the Yes button.

Alert 3

And close the modal.

<no audio> Click the Close button.

Alert 4

As we'll learn in another module... the Priority Alert subject displays on all page headers, but since we deleted it, it will disappear once we open a new page, and the header is refreshed.

OK. We are assigning a new card. Where do we go? Click anywhere for a hint.

<no audio> Where do we go to assign a new WIC Card? Click anywhere for a hint.

Assigning a New Card

Assign Card 1

<Waiting> <screen description – no audio> Working...please wait and spin icon display.

We've verified Jen's identity so go ahead and assign the new card, typing its number, 6107279300000626 since we don't have a card reader, then capture her signature.

<no audio> Assign the card, typing the number 6107279300000626, then capture the signature following any cues that display.

<audio hint> We must select the Primary Cardholder's row. Click the Authorized Rep's row.

Assign Card 2

<no audio> Assign the card, typing the number 6107279300000626, then capture the signature following any cues that display.

WIC STAFF: Go ahead and tap the Next button, Jen.

WIC STAFF: Sign the tap OK.

Assign Card 3

As best practice dictates, lets add her Household ID to the back of the card.

Assign Card 4

In the previous module, when we reassigned a new card without deactivating, the WIC Processor showed that the original card had been replaced, allowing the PIN to automatically transfer to the new card.

When we assign after deactivating, the record at the WIC Processor only shows inactive and deactivated but not replaced, so the PIN does not transfer to the new card.

After deactivating, we should assist the family with setting a new PIN once a new card is assigned.

WIC STAFF: Since we deactivated your card earlier, we need to set a new PIN for your new card. Let's get it all set for you to be able to use it right away.

Participant: "That would be great. Thank you!"

Card History

Card History 1

Now let's take a look at Card History, which is found in the left panel.

<no audio> Click Card History

<Waiting>

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

Card History 2

The grid shows changes to the Primary Card Holder row for the household.

The first column is When.

An asterisk to the right of the time tells us this record was created in legacy and we've never made any changes to the card in that row in WINNIE.

The next column is the card number followed by status of which there are only three: Activated, Deactivated or Signature.

The Reason is why the record was created.

The PIN Activity only shows something other than Default or NA if the PIN is created, changed, or unlocked.

The Primary column is toggled on if the record is for the Primary card, which is the only type of card we have.

However, it is toggled off if the signature was collected for a card other than the current one.

Card History 3

We can view signatures by clicking the signature icon.

Go ahead and do that.

<no audio> Click to view the signature.

Card History 4

The View Signature modal opens.

The same information from the previous page is shown, except it displays the name of the Primary Cardholder at the time of the signature.

Go ahead and click Close.

<no audio> Click the Close button.

Card History 5

<Transition Slide> <screen description – no audio> Slide transitions to Erna Nichol's Card History with Signature Canceled row.

<Transition Slide> <screen description – no audio> Slide transitions to View Signature modal.

If a signature is canceled, Signature Not Available displays on the View Signature modal.

<Transition Slide> <screen description – no audio> Slide transitions back to Watt Tulle's Card History.

Card History 6

We can see a difference in the Card History if we deactivate and assign, like we did with Watt versus just replacing the card like we did with Charlie in the previous module.

For Watt there are two records (plus the signature row): Deactivated with a reason of Other and Activated with Issued.

The Reason is Other because we don't record why we deactivated a card in WINNIE.

However, the Customer Service line does select a reason, so if it's something else, you know they deactivated the card.

<Transition Slide>

<screen description – no audio> Slide transitions to Charlie Horse's Card History.

<no audio> We can see a difference in the Card History if we deactivate and assign, like we did with Watt versus just replacing the card like we did with Charlie Horse in the previous module.

Card History 7

<no audio> We can see a difference in the Card History if we deactivate and assign, like we did with Watt versus just replacing the card like we did with Charlie Horse in the previous module.

We simply replaced Charlie's card and this action shows 3 records (plus the signature row).

Activated with a reason of “cardholder data update”, Deactivated, then Activated again with another “cardholder data update”.

Since we’re updating the household account, the PIN transfers to the new card.

If we see these 3 rows, we know the card was replaced.

Card History 8

<Transition Slide> <screen description – no audio> Slide transitions to Erna Nichol’s Card History.

One last note is that Activated and Cardholder data update (followed by a signature row) also show if we were to make a change to the Primary Card Holder’s information.

End Slide 1

This completes our review of Manage eWIC Account except for Transaction History, which we’ll look at in another module.

Click the button to continue.

<Transition Slide>

<screen description – no audio> Slide transitions from Card History to Test Your Knowledge page.

Test Your Knowledge

True/False Q#1

We must always click the Send eWIC Data button after deactivating a WIC Card to communicate the deactivation to the WIC Processor.

Answer #1

The answer is False.

Deactivating a card is the one change on the eWIC Household Demographics page that is automatically communicated to the WIC Processor and does not require us to click the Send eWIC Data button.

Multiple Choice Q#2

Which statement is false?

- A. We can search using a number for a deactivated card.

- B. When we replace a card, Card History will show two Activation records and one Deactivation record.
- C. When we deactivate then assign a new card, Card History will show one Deactivation and one Activation record.
- D. The only time we have to set a new PIN is if we deactivate a card and don't immediately assign a new card.
- E. In Card History, we may see reasons for Deactivation besides "Other".

Answer #2

The answer is D.

We must set a new PIN any time a card is deactivated. The PIN for deactivated cards does not carry forward to new cards.

End

End Slide 2

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.

Revisions

REVISION 2 – August 2024

- Revised information about verbal verification of identity (per State Consultants).
- Revised/updated Card History Primary toggle information.

Revision 1 - July 2024

- Divided WIC Card 1C into two modules: Replacing WIC Cards and Deactivating WIC Cards & Card History.
- All slides corrected since two new buttons added (Reset Pin Count and Assign/Replace Card).
- Found during Pilot that the PIN does not transfer to the new card if the card is deactivated before assigning the new card. Revised all information pertaining to deactivation.
- Expanded information about records in Card History based on deactivation/replacement of cards.

DEACTIVATING WIC CARDS & CARD HISTORY

- Added headers for TOC into script.

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