Issue Benefits 3A – Direct Ship – WINNIE Online Training Module

SEPTEMBER 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It's an overview of direct ship in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being September 25, 2023.

Overview 1

Direct Ship is a method of providing formula when it isn't readily available in stores for families to purchase with their WIC Card.

Direct Shipped formula is ordered by our local agency from the State Office who then ships the formula to our clinic so that we can provide it directly to the family.

Only one month of direct shipped benefits should be issued at a time per Federal Regulations.

<Transition Slide>

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

Scenario 1

Trip Upp is an almost 6-month-old infant whose family had difficulty finding his formula last month due to a temporary shipping shortage.

Scenario 2

We are going to direct ship his formula for October and have been told he should be able to find it again in November, so we'll issue his future formula as regular food benefits.

Scenario 3

He won't be 9 months until late in December, and since his cycle is the 1st to the end of the month, we'll be issuing October through December and the MCA will be scheduled for January.

Double-click Trip's card to open his folder.

<Waiting>

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

Alert 1

Per an alert for Trip, he is only approved for Nutramigen through November.

Also, since he will be 6 months old when he receives his October set, it indicates he should be issued age-appropriate foods.

We want to keep this alert, so we'll just click the Close button.

Food Package III 1

Trip is receiving a medical formula, which means he's Food Package III.

What do we need to do before issuing benefits? Go ahead. Click anywhere for a hint.

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

<Waiting>

<screen description – no audio> Spin icon displays.

Food Package III 2

<no audio> What do we need to do before issuing benefits? Click anywhere for a hint.

<no audio> Use the calendar icon in the field.

<audio – hint> Click the Calendar Control in the Food Package III Verified Date field.

Food Package III 3

<no audio> What do we need to do before issuing benefits? Click anywhere for a hint.

<audio – hint> Select today's date, September 25.

Food Package III 4

<no audio> What do we need to do before issuing benefits? Click anywhere for a hint.

<audio – hint> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

Food Prescription 1

Now let's take a look at the food prescription.

<no audio> Select Food Prescription from the sidebar.

<Waiting>

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

Food Prescription 2

Go ahead and click the Effective Date of the food package being issued today to expand the card. Click for a hint.

<audio – hint> Click the 9/28/2023 Effective Date.

Food Prescription 3

How do we view the Nutramigen's Special Prescription End Date? Go ahead. Click for a hint.

<audio – hint> Click the Nutramigen Formula row.

Food Prescription 4

This is Trip's 6-month food package and as indicated in the alert, he's OK to be issued the infant foods and the Nutramigen expires in November.

If we are going to issue benefits for December 1, he will need a new food package.

Food Prescription 5

Trip was using soy formula previously and mom is OK with that being issued for December since she's hoping not to have to continue with Nutramigen.

Let's create that December 1 food package for soy powdered formula. Follow any cues that display. Click anywhere for a hint.

<no audio> Create the December 1 food package for soy powdered formula, following any cues that display. Click anywhere for a hint.

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

Food Prescription 6

We're going to type the Effective Date. Click three times on the date to highlight it.

<no audio> Click three times.

Food Prescription 7-8

<no audio> Click three times.

Food Prescription 9

<no audio> Type: 12/1/23

<audio – hint> Type 12/1/23.

Food Prescription 10

<no audio> Create the December 1 food package for soy powdered formula, following any cues that display. Click anywhere for a hint.

<audio – hint> Click the Use Default button.

Food Prescription 11

<no audio> Create the December 1 food package for soy powdered formula, following any cues that display. Click anywhere for a hint.

<audio – hint> This will not be a special formula prescription. Click the No button.

Food Prescription 12

<no audio> Create the December 1 food package for soy powdered formula, following any cues that display. Click anywhere for a hint.

<audio – hint> This will not be a special formula prescription. Click the Formula Type dropdown.

Food Prescription 13

<no audio> Create the December 1 food package for soy powdered formula, following any cues that display. Click anywhere for a hint.

<audio – hint> Select Contract.

Food Prescription 14

<no audio> Create the December 1 food package for soy powdered formula, following any cues that display. Click anywhere for a hint.

<audio – hint> Click the Food Item dropdown.

Food Prescription 15

<no audio> Create the December 1 food package for soy powdered formula, following any cues that display. Click anywhere for a hint.

<audio – hint> Select Similac Soy Isomil (12.4 oz pwd).

Food Prescription 16

<no audio> Create the December 1 food package for soy powdered formula, following any cues that display. Click anywhere for a hint.

<audio – hint> Click the Save button.

Food Prescription 17

Let's collapse this card…

<no audio> Collapse the 12/1 food package card.

Food Prescription 18

…and make sure our 9-month food prescription looks OK.

Go ahead and expand it.

<no audio> Expand the 12/28 food package card.

Food Prescription 19

Yep. We're good.

Let's get to issuing benefits.

<no audio> Select Issue Benefits from the sidebar.

<Waiting>

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

Direct Ship 1

Direct Ship is most often used with special or medical formulas but can be used for any formula that has a shortage, which is why all formulas display the Direct Ship toggle.

Direct Ship 2

Direct Ship benefits are not added to the household's Electronic Benefit Account (EBA), which means they aren't sent to the WIC Processor.

Direct Ship 3

However, they are stored in the WINNIE database, counted in the Monthly Participation, and can be voided or adjusted if necessary.

Direct Ship 4

Adjust benefits is the other side of issuing.

It's where we can void benefits before anything is purchased and correct or modify after purchases or redemptions have occurred.

Direct Ship benefits are automatically considered redeemed by WINNIE once the PFDTU is either today or in the past, which means if we issue direct ship benefits late, they are immediately redeemed.

Once "redeemed", the system will not allow us to void them; we can only adjust them.

Voiding and adjusting benefits, including direct shipped, is covered in the Adjust Benefits training modules.

Direct Ship 5

We are going to direct ship the October benefits, so simply toggle on Direct Ship below the October set.

Direct Ship 6

Click below the scroll bar.

Direct Ship 7

When we toggle on Direct Ship, the Direct Shipped Items modal opens at the bottom of our page.

The Issue Benefits button is disabled until the required information, Ship To and the Direct Ship Quantity, are completed.

For reference, the household member for whom benefits are being direct shipped, the formula, the benefit set, and the number of cans being issued display.

Go ahead and click the Ship To dropdown.

Direct Ship 8

There are three options, but MN WIC only uses In Stock.

If we were to select either of the other options, such as Clinic, the address fields would auto-populate with the clinic's addres.

Direct Ship 9

If we select Participant, they would populate with the household's address.

<Transition Slide>

<screen description – no audio> Slide transitions back to dropdown list

Direct Ship 10

Select In Stock.

Direct Ship 11

Notice that the Address fields are disabled.

So, here's our tip.

If we select from the Ship To dropdown and there is an address, we've selected the wrong option.

Direct Ship 12

We can enter any number of cans, up to the Total Quantity, into the Direct Ship Quantity field.

What that means is that we can direct ship part of the formula and issue the rest to the electronic benefits account.

For Trip, we're going to direct ship all of it.

Click into the Quantity field and type the total quantity.

Direct Ship 13

<no audio> Click into the Quantity field and type the total quantity.

Direct Ship 14

Once we've completed the required fields, the Issue Benefits button is once again enabled.

Go ahead and click it.

<no audio> Click the Issue Benefits button.

Direct Ship 15

Since direct ship benefits are not sent to the WIC Processor, they do not display on the Aggregated Issuance modal.

Only food items that can be purchased with the WIC Card display.

Click the Send eWIC Data button.

<Waiting>

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

Question 1

This time, we're going to print the Shopping List.

Before we do, here's a question…

Would we expect to see the direct shipped formula on the Shopping List?

> WIC STAFF: Would you like me to print the Shopping List for you?
>
> Participant: "Yes. That would be great."

Shopping List 1

Were you right?

Click the Generate Shopping List button.

<Transition Slide>

<screen description – no audio> Slide transitions to Shopping List.

Shopping List 2

Only food items added to the electronic benefit account at the WIC Processor display on the Shopping List and Account Balance.

Click the button to continue.

Close Issuance 1

Go ahead and close the modal.

<Transition Slide>

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

Show Details 1

Direct shipped benefits display like any other issued benefits in Show Details.

We'll continue our review of Direct Ship in the next training module.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

If benefits are issued after the PFDTU and direct shipped, they are already considered "redeemed" by the system and cannot be voided (but can be adjusted).

Answer #1

The answer is True.

Direct shipped benefits are considered redeemed by the system once the PFDTU is either today or in the past. Since late benefits are issued after the PFDTU, they are "redeemed". The system will not allow redeemed benefits to be voided but they can be adjusted.

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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