

# Issue Benefits 1 – 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 issuing food benefits in WINNIE, the MN WIC Information System.

### Date

All dates in this module are based on today's date being September 20, 2023.

### Overview 1

Food benefits are provided each month to all WIC participants, usually on a tri-monthly schedule, except for fully breastfed infants less than 6 months old and some-breastfeeding women more than 6 months postpartum who do not receive food benefits.

### <Transition Slide>

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

### Overview 2

There are many components that make up a nutrition visit.

In this module, though, we are just going to focus on issuing benefits.

### Household 1

The Lee's are here for a certification appointment for Merry.

Go ahead and search for their Household ID 13697730, which is on the back of their WIC Card. Click anywhere for hints.

<audio – hint> Click into the Household ID field.

### Household 2

<no audio> Search for the Household ID. Click anywhere for hints.

<audio – hint> Type 13697730.

## Household 3

<no audio> Search for the Household ID. Click anywhere for hints.

<audio – hint> Click the Search button or press the Enter key on the keyboard.

## Show Details 1

Whenever we are issuing benefits, our first step should always be to review Show Details for each member of the household in order to view cert dates, MCA due dates, and benefit cycles.

Go ahead and toggle it on then collapse the Search criteria panel.

<no audio> Toggle on Show Details then collapse the Search criteria panel.

## Collapse 1

<no audio> Toggle on Show Details then collapse the Search criteria panel.

## Show Details 2

In general, when we see a certified infant without any benefits issued, we can assume they are fully breastfed.

## Show Details 2A

Abe is good to go.

His cert ends in May, his MCA isn't due until February, so he just needs a Nutrition Visit.

Click on Ashe's card.

## Show Details 3

Ashe is good to go, his cert ends in January, his MCA was completed in June, so, again a nutrition visit.

Click on Merry's card.

## Show Details 4

It appears Merry is high risk, which could mean Food Package III, and we know Merry's due for a cert.

Go ahead and view Norma's card.

## Show Details 5

Norma is also good.

Her cert ends in May, her MCA isn't due anytime soon, so again a nutrition visit.

## Benefit Cycle 1

All members of a household have the same benefit cycle.

## Definitions 1

A benefit set can have four dates associated with it.

The cycle's Printed First Date to Use or PFDTU and the cycle's Last Date to Use or LDTU, and the First Date to Use or FDTU.

The fourth is the Issued Date or the date the benefits were electronically added to the account for the household.

## <Transition Slide>

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

## Definitions 2

The Printed First Date to Use is the date their cycle begins each month.

If the PFDTU is September 9<sup>th</sup>, 2023, then that set is counted in the Monthly Participation for September 2023.

## Participation Count 1

The monthly Participation Count is the number of participants issued benefits each month at a WIC agency and is used to determine funding allocations for our WIC Program.

The month and year of the PFDTU determines the month and year they are counted for in the Participation Count.

Each participant is only counted once per month and voided benefit sets are not counted.

## Participation Count 2

Fully BF infants less than 6 months old and some-bf women more than 6 months postpartum are added to the Participant Count during the End-of-Month process if the other member of their dyad, mom or baby, are issued benefits for that month.

### Definitions 3

The Last Date to Use, or LDTU, is the date their cycle ends.

A cycle is a month long, which means the LDTU is in the next month and is the day before the next PFDTU.

If the PFDTU is September 9 then the LDTU is one day less the following month, so October 8.

### Definitions 4

The PFDTU is also the first date food items can be purchased for a benefit set, and a household has until midnight of the LDTU to buy them.

### Definitions 5

The First Date to Use, or FDTU, is the same as the PFDTU if the benefits are issued on or before their PFDTU.

If benefits are issued after the PFDTU, which is late benefit issuance, then the FDTU is the date the benefits were issued, and that becomes the first date a household can use those benefits.

Since late issuance can only occur with the first set of benefits, the FDTU will always be the same as the PFDTU for the second and third sets issued.

We might wonder why the FDTU matters, but it becomes important with age category changes when issuing and adjusting benefits.

### Question Slide 1

What is the PFDTU, FDTU and LDTU for the September set of benefits?

The cycle begins on 9/15 and the benefits were issued on 9/18 for September, October and November.

- A. PFDTU = 9/15, FDTU = 9/15, LDTU = 9/14
- B. PFDTU = 9/15, FDTU = 9/18, LDTU = 10/15
- C. PFDTU = 9/18, FDTU = 9/15, LDTU = 10/14
- D. PFDTU = 9/15, FDTU = 9/18, LDTU = 10/14
- E. PFDTU = 9/15, FDTU = 9/15, LDTU = 10/14

Select an answer and click the button to continue.

### Answer Slide 1

Benefits were issued on 9/18.

The PFDTU is the cycle start date of 9/15, the FDTU is the same as the issued date of 9/18 since it is late issuance, and the LDTU is one day before the PFDTU in October, which is 10/14.

Click the button to continue.

## <Transition Slide>

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

## Open Folder 1

Double-click on Merry's card to open her participant folder.

## <Waiting>

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

## Alert 1

We have two alerts, one for Merry, indicating a special prescription ends this month, and one for Ash, letting us know he is to receive soy foods until January 2024. The alerts are providing current information about the food package and are still relevant, so let's just close the alerts modal.

## Sidebar 1

Issue benefits is enabled under Benefit Management as long as the participant is eligible for benefit issuance.

In general, best practice is to review food packages as part of the nutrition visit before opening Issue Benefits.

For now, though, let's just open the Issue Benefits page.

<no audio> Select Issue Benefits from the sidebar.

## <Waiting>

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

## Household Information 1

The Household Member Information grid displays all members, including those who are categorically ineligible.

The Additional Information card shows certification and issuance dates for the member whose row is selected in the grid above.

## Additional Information 1

The Additional Information card can be helpful in explaining why the system may have suggested fewer sets of benefits than expected.

For instance... go ahead and click on Merry's row...

## Additional Information 2

...maybe we didn't notice a cert was ending.

Issuance Details is where we issue benefits.

Let's click below the scroll bar to view it.

## Issuance Details 1

Issuance Details contains a card for each member of the household that could potentially be issued benefits.

In other words, all household members except for 5-year-old children.

## Issuance Messages 1

The pink banners in each member's card are messages as to why benefits are not being suggested.

There are basically three types: action required, which all of these messages are, pending information, and explanatory.

## <Transition Slide>

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

## Action Required Msgs 1

Action messages require us to do something in order for benefits to be suggested.

They include updating breastfeeding, food package III and homeless verified dates to today, correcting or creating food packages, and reinstating, transferring members, or certifying members.

Click the button to continue.

<screen description – no audio> Breastfeeding verified date is not today's date; Food package III verified date is not today's date; Homeless verified date is not within 30 days of today's date; no valid food prescription (may occur with VOC); Food prescription doesn't exist for age category; Food item, or special prescription food item, is expired or will be expiring; Currently terminated; and Not assigned to current clinic.

## Pending Info Msgs 1

Pending Information messages usually limit us to issuance of only one month of benefits until the pending status is resolved.

These include income, identification, and residence.

Click the button to continue.

<screen description – no audio> Pending proof of income; Pending proof of identification; and Pending proof of residence.

## Explanatory Msgs 1

Explanatory messages tell us why benefits are not being suggested and, in general, that status can't be changed.

Click the button to continue.

## Issuance Messages 2

These are all action-required messages.

However, we want to certify Merry before we issue to the household, and we can take care of her action message by updating her Food Package III Verified Date during the cert.

We are in Merry's folder, so go ahead and collapse Clinic Actions and start her cert. Click anywhere for hints.

## Cert 1

<no audio> Collapse Clinic Actions and start a cert for Merry. Click anywhere for hints.

<audio – hint> Select Begin Certification on the sidebar.

## Cert 2

We want to certify before issuing the set with the PFDTU in the month Merry's cert ends, or her September benefits.

Click Yes.

<no audio> Collapse Clinic Actions and start a cert for Merry. Click anywhere for hints.

<no audio> Click the Yes button.

## Cert 3

<no audio> Collapse Clinic Actions and start a cert for Merry. Click anywhere for hints.

<audio – hint> Click the Yes button.

<Waiting>

<screen description – no audio> Spin icon displays.

## Cert 4

We're going to complete some of the cert behind the scenes.

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

## Cert 5

Let's select Health Information from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

## FP III 1

In order to be able to issue benefits for Food Package III participants, the Verified Date must be the current date.

Since Merry's prescription is approved through 9/30, we need to update it.

Click the calendar control icon in the Food Package III Verified Date field and select today's date, September 20<sup>th</sup>.

## FP III 2

<no audio> Click the calendar control icon in the Food Package III Verified Date field and select today's date, September 20<sup>th</sup>.

## FP III 3

And click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

## FP III 4

We're going to complete a few more cert requirements...

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



## Risk Factors 1

Merry's high risk was reassessed during the cert and reassigned once her height and weight were added.

Go ahead and select Food Prescription from the sidebar.

### <Waiting>

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

## Food Prescription 1

Remember, WINNIE creates a food package for any age category change occurring during the certification period.

So, it created a 3–5-year default food package for her third birthday.

It also creates a default food package for today.

Let's verify that looks OK.

Collapse this food prescription by either clicking the Effective Date or the Toggle icon in the header.

## Food Prescription 2

Collapse the 9/20 Effective Date or toggle icon to expand the food prescription.

## Food Prescription 3

Let's verify the Boost approval ends.

Click the Boost formula row.

## Food Prescription 4

Merry's special prescription ends this month, as our alert indicated, so we need to create a new default food package with an Effective Date of her October PFDTU, which is the 9<sup>th</sup>.

### <Transition Slide>

If we don't add a food prescription for next month...

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

## Food Prescription 5

...We will get another action-required error indicating we can't issue October benefits because our special food prescription is expired.

### <Transition Slide>

<screen description – no audio> Slide transitions to Food Prescription page in Cert Mode.

## Food Prescription 6

So, let's create the default food package for October 9<sup>th</sup>, follow any cues that display, and click anywhere for hints.

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

## Food Prescription 7

<no audio> Create a default food package for October 9, following any cues that display. Click anywhere for hints.

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

<audio – hint> Click the Calendar Control icon in the Effective Date field.

## Food Prescription 8

<no audio> Create a default food package for October 9, following any cues that display. Click anywhere for hints.

<no audio> Use the right arrow (Next) icon.

<audio – hint> Click the right arrow (Next) icon.

## Food Prescription 9

<no audio> Create a default food package for October 9, following any cues that display. Click anywhere for hints.

<audio – hint> Select October 9th.

## Food Prescription 10

<no audio> Create a default food package for October 9, following any cues that display. Click anywhere for hints.

<audio – hint> Click the Use Default button.

## Food Prescription 11

<no audio> Create a default food package for October 9, following any cues that display. Click anywhere for hints.

<audio – hint> Click the Save button.

## Food Prescription 12

We want to remind mom that Merry's Boost prescription ends and check that the default food package is OK.

We are ready to finish this certification.

Since we want to issue benefits collapse the Clinic Actions and select Issue Benefits from the sidebar.

## Complete Cert 1

<no audio> Collapse the Clinic Actions and select Issue Benefits from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

## Complete Cert 2

Click OK or press the Enter key.

## Complete Cert 3

Click the appropriate buttons to capture the signatures.

<audio – hint> Click the Capture Signature button or press the Enter key on the keyboard.

## Complete Cert 4

<no audio> Click the appropriate buttons to capture the signatures.

## Complete Cert 5

<no audio> Click the appropriate buttons to capture the signatures.

<audio – hint> Click the Save Signature button or press the Enter key on the keyboard.

## Complete Cert 6

Click the appropriate buttons to capture the signatures.

<audio – hint> Click the Capture Signature button or press the Enter key on the keyboard.

## Complete Cert 7

<no audio> Click the appropriate buttons to capture the signatures.

## Complete Cert 8

<no audio> Click the appropriate buttons to capture the signatures.

<audio – hint> Click the Save Signature button or press the Enter key on the keyboard.

## <Waiting>

<screen description – no audio> Spin icon displays.

## Multiple PFDTU 1

In the cert modules, we talked about this Multiple PFDTU Dates Available displaying when it's late issuance for the previous month.

But it also displays if it's late issuance for the current month, as is the case with Merry.

## Multiple PFDTU 2

Just like before, best practice is to always select late issuance, but this time it is in order to maintain the current benefit cycle of the 9<sup>th</sup> to the 8<sup>th</sup> and ensure Merry's cycle stays synced with the rest of her household.

Go ahead and select late issuance for Merry's September benefits.

## Multiple PFDTU 3

<no audio> Select late issuance for Merry's September benefits.

<audio – hint> Select 9/9/2023.

## Multiple PFDTU 4

<no audio> Select late issuance for Merry's September benefits.

<audio – hint> Click the OK button.

## <Waiting>

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

## Issuance Messages 3

Go ahead and click below the scroll bar.

## Issuance Messages 4

We've resolved one issuance message for Merry and she's good to go.

However, we still have 3 others that we need to address.

We'll our issuance to the Lee family 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](mailto:health.wic@state.mn.us), [www.health.state.mn.us](http://www.health.state.mn.us); to obtain this information in a different format, call: 1-800-657-3942.*

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