

Benefit Issuance Basics

Intro

This HuBERT on-demand training module ...

Intro1

... is provided by the MN Department of Health WIC Program. It provides an overview of benefit issuance.

Concepts & Definitions

Show Details

We already covered some benefit issuance basics when reviewing Food Packages. In this module, we're going to expand on those concepts.

We know that we can view what the last sets of benefits issued to Mama Vine were on the Participant List screen by clicking...what? Go ahead.

<no audio – failure hint> Click the **Show Details** button.

PFDTU and LDTU

A Benefit Set includes the Printed First Date to Use (PFDTU) and the Last Date to Use (LDTU) for a group of food items issued to a WIC Card for one month.

The Show Details panel also indicates if the benefit sets were issued or voided. In this case, the last set, which was issued for May, was voided.

PFDTU and LDTU 1

The PFDTU is the first date the food items can be purchased for that benefit set, and participants have until midnight of the LDTU, the last date, to buy them. After that, the food items issued for that benefit set are automatically removed from the card and can no longer be purchased.

Issuance Cycle

The date of the PFDTU, in this instance the 26th, and the date of the LDTU, the 25th, are the issuance cycle.

An issuance cycle is a month long and the PFDTU and LDTU are usually the same date each month.

PPTN Month

The month and year of the PFDTU is the participation month.

Once a benefit set is issued the participant is included in the Participation Count for that month.

PPTN Count

The Participation Count is the number of participants issued benefits each month by an Agency and is used for determining funding allocations for the Local Agency's WIC Program.

Each participant is only counted once per month.

Voided benefits sets are not counted, unless re-issued.

Those not issued benefits, some-breastfeeding women more than 6 months postpartum and fully breastfed infant less than 6 months old that are part of a breastfeeding dyad, are counted if the other participant in the dyad (the some-breastfed baby or fully-breastfeeding mom, respectively) is issued benefits for that month.

HH Cycle

Let's take a look at Beau's cycle.

<no audio – failure hint> Click on Beau Vine's row.

Members of the same household should have the same benefit cycle.

Issue Benefits Screen & More Concepts

Issue Benefits

Today is June 10th. Let's take a look at Benefit Issuance for Mama and Beau.

We can only issue benefits from within a participant folder. Go ahead and open Beau's folder.

<no audio – hint after 7 seconds> Double-click Beau Vine's row or click the Open Participant Folder icon.

Transition Slide

Before Issuing Benefits

Our nutrition education contacts can be much more efficient and effective if we take the time to review a household's Participant Folders before interacting with them. This may not always be possible, but it is definitely best practice.

It will also save us time if we don't open the Issue Benefits screen before assessing a couple of different things...

1 and 2

First, if there is an infant in the household, are mom and baby breastfeeding? We will need to discuss how breastfeeding is going and update the Date Breastfeeding Verified in Health Information and possibly the Breastfeeding Amount and food package if it changes.

Second, is anyone receiving Food Package III? If so, we will need to update the Date Food Package III Verified in Health Information and ensure the food prescription hasn't expired and/or note when it does.

3 and 4

Third, is anyone turning one year old? Is HuBERT going to suggest an infant or child food package and of it's a child food package, is that appropriate?

Fourth, is anyone turning two or three years old? Does the child have a food package with an Effective Date of their second or third birthday? If not, one will need to be created and may need to be tailored.

Notice the common theme. The food package will need to be updated or verified in all of these instances.

Best Practice

So, BEST PRACTICE! If the participant is receiving food benefits then we should verify their food package before issuing benefits.

Transition Slide

Check Health Info

So let's practice what we are preaching.

Go ahead and check Health Information first.

<no audio> Click the **Health Information** tab.

We are checking for food package III.

But here's a tip from what we've already learned: all food package III participants are high risk so the tabs in their folder would be yellow.

Let's check the food package.

<no audio> Click the **Food Prescription** tab.

Check Food Rx

We can see from the Participant Folder title bar that Beau is going to turn 3 years old and we can see from his food prescriptions that he needs a food package with an Effective Date on his third birthday.

Let's click back to Demographics for his birth date.

<no audio> Click the **Demographics** tab.

Got it?

<no audio> Click the **Food Prescription** tab.

Go ahead and add Beau's three year food package. Mom is OK with the default food package.

<no audio – failure hint> Click the **Add** button.

Add Food Rx

<hint> Use the drop-down calendar.

<no audio – failure hint> Click the **Effective Date of Food Prescription** drop-down.

<no audio – failure hint> Select **June 28**.

<no audio – failure hint> Click the **Use Default** button.

Open Issue Benefits

The issue benefits icon in the Participant Folder looks like a hand holding a check and is only enabled if this member of the household is eligible to receive benefits.

We can also use the Benefit Management menu option to open the screen.

Open in CGS

We can also open Issue Benefits in the CGS at the end of a certification.

Go ahead and open the Issue Benefits screen using the icon in the Participant Folder.

<no audio> Click the **Issue Benefits** icon.

HuBERT has a fair amount of information to process before opening the Issue Benefits screen, such as the household members and whether they are eligible, benefit cycles, food packages, and validations. The larger the household, the longer it tends to take.

Food Rx Tab

At the top of the screen are two tabs: Benefits and Food Prescription. Let's take a quick look at the Food Prescription tab.

<no audio> Click the **Food Prescription** tab.

The functionality of this tab is very limited. It allows us to view existing food packages for the household and we can edit food packages with an effective date of today or the future.

<no audio> Click on 11/09/2018 to highlight.

<screen description> Edit Food Prescription button still disabled.

<no audio> Click on 06/28/2019 to highlight.

Edit Food Rx

<no audio> Click the **Edit Food Prescription** button.

Edit Food Rx 1

The Edit Food Prescription screen functions the same as it does in the Food Prescription tab in the Participant Folder. Click Cancel since we aren't actually going to edit the June 28th food package.

Food Rx Tab 1

We need to note that we can't create new food packages from this tab so we wouldn't have been able to create the food package for the three to five year age category beginning on June 28th that we needed for HuBERT to suggest Beau's future benefit sets.

Let's go back to the Benefits tab.

<no audio> Click the **Benefits** tab.

HH Mbr Info

The Household Member Information grid at the top of the Issue Benefits screen provides a slew of information, such as when their last set was issued and its PFDTU and LDTU, their most recent cert dates, when they will be categorically ineligible, and...

<no audio> Click to the right of the scroll bar.

...their current WIC Category and the termination reason for their most current cert, if one exists.

<no audio> Click to the left of the scroll bar.

Last Set Suggested

HuBERT calculates eligibility and determines which sets are appropriate to issue based on the last set's Last Date to Use and the certification end dates.

The system will automatically suggest the last possible set to issue before the cert end date, which is the set with a PFDTU before the Cert End Date and LDTU after.

Last Set Voided

It also recognizes when benefits for a particular month have been previously issued and voided and will automatically re-suggest, as is the case with the May benefits, the set that was previously voided.

Last Set Suggested 1

Even though they are tri-monthly, which means they can be issued 3 months of benefits at one time, for Mama, HuBERT has only suggested two sets, May and June, because her Cert End Date is June 30th so we will need to recertify her as postpartum before providing more benefits.

Beau's Cert End Date is July 31st and the system has also suggested his last set before he needs to be recertified. Notice though that there isn't a checkmark beside it.

Checkmarks

The checkmarks allow us to control which benefit sets are issued and to whom.

Those next to the names indicate benefit sets will be issued to these household members.

Checkmarks next to the benefits sets indicate those sets will be issued.

HuBERT always attempts to keep the household benefit issuance in sync. Since Mama's last set is June, HuBERT has **not** auto-selected the July set for issuance to Beau.

We can over-ride this and issue Beau's July set by simply clicking the checkbox.

<no audio> Click the **checkbox** next to Beau's July set of benefits.

Last Set in Cert

However...although HuBERT auto-suggests the last set participants are eligible to receive during a certification period, in general, if a participant is going to be recertified, benefits should NOT routinely be issued for the month their cert ends. Instead, we would want to recertify them during the month their Cert Ends, after which, benefits for that month can be issued.

If we follow this general guideline, which benefit sets should we de-select? Go ahead, starting with Mama's then Beau's.

<no audio – failure hint> Click the checkbox next to Mama's June benefits.

Last Set in Cert 1

<no audio – failure hint> Click the checkbox next to Beau's July benefits.

And, what should we do if we want to keep the **benefit sets** for the members of the household in sync? Go ahead.

<no audio – failure hint> Click the checkbox next to Beau's June benefits.

The one caveat to this is that infants, again in general, should be recertified as children **after** their first birthday. The recert can be scheduled for the same month as the Cert End Date or the following month, whichever makes most sense.

Late Issuance

The May benefit sets for Beau and Mama are both bolded and have a date within carrots. These visual cues indicate late issuance.

Late Issuance 1

Late issuance can only be applied to the first set of benefits issued. It occurs when food benefits are added to the card after the benefit cycle for that month has begun. So, in this case, after May 26th.

Late Issuance 1A

It can occur up to, and including, the last date to use of that month's cycle, or in this instance June 25th.

Since we are issuing the May benefits, or adding the May food items to the WIC Card, on June 10th, we are issuing late for May.

Late Issuance 2

With late issuance, the Printed First Date to Use is encased in the carrots.

The second date listed is called the First Date to Use, or FDTU. It's the first date the participant can actually use the card to purchase foods for a benefit month. Since they are being issued on 6/10, June 10th is the first date they can purchase foods issued for May so that is the FDTU for the May benefits.

The Issued Date is the date benefits are actually added to the WIC Card.

With late issuance the FDTU is the same as the Issued Date for the first set of benefits.

For future months, the FDTU is the same as the PFDTU.

Early Issuance

Let's apply our definitions to early issuance for Ray Deo.

The date is still June 10th.

It's considered early issuance because we are issuing benefits **before** the PFDTU of his June benefit cycle.

What is the date of the PFDTU? Click on it.

The 16th is the date of their PFDTU. It's the first date in his benefit cycle.

What is the date of the FDTU?

The 16th is also the date of the FDTU because it is the first date they can use their card to purchase foods for that benefit month.

What is the issued date?

The 10th is the issued date because it is the date the foods are being added to the card.

We should note with early issuance, HuBERT will allow benefits to be issued up to 75 days before the last set's LDTU. This simply provides us with flexibility in issuing future benefits but does not allow us to issue beyond 4 months of benefits at one time.

Proration

Proration

Proration only applies to the first set. It is a reduction in certain food items due to there being fewer days for the household to use their benefits as can occur with late issuance and syncing packages (which we have yet to talk about).

HuBERT will automatically suggest a prorated set based on the number of days between the **first** date to use and the last date to use.

Prorated Foods

For women and children only the quantity of milk is decreased. If they are food package three, the amount of formula provided is also prorated.

If there are 31 to 24 days between the FDTU and the LDTU the system suggests a full package, 23 to 16 days is three fourths, 15 to 8 days is a half package, and 7-1 days is a quarter package.

For infants, formula, infant fruits and vegetables and infant meats are decreased.

Their proration starts later and is never less than a half package. So at 15-8 days their packages are prorated to three-quarters and with 7 to 1 day left they receive a half package.

Prorated

In general, we should accept the prorated amount suggested by the system.

And if providing a prorated food package, we should avoid using terms like “half package” or “prorated” since these terms won’t mean anything to our participants.

We want to make sure the participant or proxy understands which specific foods will be decreased in the first set and why.

Edit Prorated

There may be instances where it is appropriate to edit the suggested proration amount and we should follow our local agency’s guidelines as to when those may be.

We can edit the suggest proration by selecting the benefit set we want to edit, which will highlight it and enable the Edit First Set button...

<no audio> Click the checkbox next to the first benefit set under Beau Vine to highlight it and enable the Edit First Set button.

...and clicking the button.

Edit First Set

We can select the size of the package to that which we deem appropriate. Let’s change Beau’s package to a full package.

<no audio> Select the **Full** radio button.

The Reason for Editing is required.

<no audio> Click the **Reason for Editing** drop-down.

Edit Reasons

There are only two reasons: **CPA Discretion (See Notes)**, which means we will need to document why we changed the suggested proration in a General Note.

The CPA discretion reason can be used if we determine the household has a valid reason for picking up their benefits late.

Edit Reasons 1

The other reason is **Late Pickup is Clinic’s fault**, which should be self-explanatory.

Let's select CPA Discretion.

<no audio> Select **CPA Discretion (See Notes)**.

And click OK to save the change.

<no audio> Click OK or press the Enter key.

Wait Edit

<cursor spins>

Prorated 1

<screen description> Beau's package size changed to Full.

Notice that HuBERT reset the originally suggested benefit sets. Let's leave those for now.

Go ahead and edit Mama's first benefit set to Full, selecting the same reason.

<no audio – failure hint> Click the checkbox next to the first benefit set under Mama Vine to highlight it and enable the Edit First Set button.

Edit First Set 1

<no audio – failure hint> Select the **Full** radio button.

<no audio – failure hint> Click the **Reason for Editing** drop-down.

<no audio – failure hint> Select **CPA Discretion (See Notes)**.

<no audio – failure hint> Click OK or press the Enter key.

Wait Edit 1

<cursor spins>

Edit First Set 2

<screen description> Mom's first set is now Full.

Let's re-deselect the June benefits for Beau, then Mama. Go ahead.

<no audio – failure hint> Click the checkbox next to 06/26/2019 - 07/25/2019 Full under Beau Vine.

<no audio – failure hint> Click the checkbox next to 06/26/2019 - 07/25/2019 Full under Mama Vine.

We are now ready to issue the benefits to the WIC Card.

Issue Benefits to Selected Members

Issue

To issue the benefit sets we've selected, we click the **Issue Benefits to Selected Members** button.

<no audio> Click the **Issue Benefits to Selected Members** button.

Aggregated Screen

The Aggregated Issuance for EBT Account screen opens.

This is our final chance to review the food items and quantities to ensure the food package is correct before issuing to the WIC Card.

If we need to make a change, we can click the X in the top right corner or the Close button to exit this screen.

The grid shows the benefit sets, in this instance, only the May benefits, for all household members to whom benefits are being issued, the food items, the amount issued to each member, and the aggregated, or combined, quantities that will be issued to the WIC Card.

The numbers that display in front of the food items are category and subcategory numbers and are irrelevant to us.

Aggregated Bottom

The Service Site Redemption at the bottom of the screen is for states that use off-line technology (so not us).

The Status and Send EBT Data button should both be familiar to us by now. We click the button to send eWIC data, in this instance, food items and quantities to be added to the WIC Card for this household, to the WIC processor as well as save the data to HuBERT. After which, the Status w accordingly.

We've verified the food package and are ready to issue to the WIC Card. Go ahead.

<no audio> Click the **Send EBT Data** button.

Send EBT Data

The Status reads "Sending EBT Issuance" while communicating with the WIC Processor.

EBT Data Sent

Once the benefits have been issued, the status changes to "Issuance Received. Success!", the Print Shopping List button becomes enabled, while the Send EBT Data button is now disabled.

Print Shopping List

Print

Let's click the **Print Shopping List** button.

<no audio> Click the **Print Shopping List** button.

Report Destination

We have three options: Display on Screen (the default), Send to Printer or Save File.

If we actually choose to print the Shopping List for our participants, we will most often Send to Printer.

But for now, let's just click OK and display it on the screen.

<no audio> Click OK or press the Enter key.

Close Aggregated

While the document is opening, let's close the Aggregated Issuance for EBT Account screen, which doesn't automatically close.

<no audio> Click the **Close** button to exit Issue Benefits.

<no audio> Click the X to exit Issue Benefits.

<Transition Slide>

Shopping List

The Shopping List is similar to the Account Balance in that it opens in Microsoft Word and is a snapshot in time but only of the household's issuance. It is only accurate until the household uses their WIC Card to make purchases.

It displays the Household ID along with each member's State WIC ID; as well as the Primary Card Holder's name and each member's name.

Since it has names of our WIC participants, which is considered private data, we need to make sure to follow the data privacy policies.

It lists the Printed First Date to Use and Last Date to Use of each set issued, along with the food items and the quantities issued to that household member on the WIC card.

<Transition Slide>

Shopping List 1

The household totals display at the bottom along with each member's certification end date and a line where we could write the next appointment or Nutrition Education visit.

Since it is a Word Document, we can modify individual shopping lists if we want to or need to but the template that generates this document is the same for all agencies statewide and cannot be modified.

We should always offer to print the shopping list for our participants.

However, if the household has a smart phone, and is registered, they can easily and immediately see their benefits on the My MN WIC App so many, if not most, probably won't be interested in the Shopping List.

End

Thank you for reviewing this HuBERT on-demand training module presented by the MN Department of Health WIC Program.