

Benefits History - WINNIE Online Training Module

OCTOBER 2023

Introduction

Intro

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

Date

All dates in this module are based on today's date being October 4, 2023.

<Transition Slide>

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

Benefits History 1

In this module, we'll look at Benefits History.

We are in Terry Bull's folder, to whom we previously issued benefits.

Go ahead and select Benefits History from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Benefits History 2

Due to the amount of data stored with benefits, MN WIC archives benefit information to another database three years after its activity date.

So, Benefits History is a reference page that provides information about all benefits issued to a participant within the last 3 years.

Benefit Period 1

The Benefit Period panel under Results lists the benefit sets by Printed First Date to Use (or PFDTU) and Last Date to Use (LDTU) with the most recent at the top.

Benefit Period 2

Like Issue Benefits, late issuance has angled brackets around the PFDTU, followed by the First Date to Use (FDTU).

The WIC Category at the time of issuance and the agency and clinic where the benefits were issued round out the Benefit Period information.

Toggle 1

We can toggle on a benefit set to view its details to the right of the Benefit Period panel.

Little tip, we don't have to click the toggle.

When we hover, the set is highlighted and as long as we click within the highlighted area, the toggle will automatically toggle on.

Go ahead and hover over the August benefits then click to display their details.

Issuance Card 1

We are going to do a brief overview of the issuance card because we look at these details a lot in the Adjust Benefits modules.

The Benefits header displays the benefit dates followed by the proration amount (if applicable).

The Issuance header displays a serial number, which is just a unique database ID for the benefit set.

The grid in the Issuance card displays the quantity, food item, and its status, which changes with adjustments.

Details 1

To the right are the details, which include the certification period during which the benefits were issued, the participation date, which is the month and the year the PFDTU falls in, the four dates associated with issuance PFDTU, FDTU, LDTU, and Issue Date, the staff person who issued the benefits, and if voided when and by whom.

Toggle 2

Go ahead and toggle on, or click on, the September then October benefits.

Toggle 3

<no audio> Toggle on, or click on, the September and October benefits.

Toggle 4

We should note, the benefit sets always display on the right in the same chronological order as the Benefit Period panel, regardless of what order they are opened in.

Buttons 1

Since opening multiple sets can make for a very long page, the Collapse All button...go ahead and click it..

<no audio> Click the Collapse All button.

Buttons 2

...collapses the Issuance cards and displays just the Benefits headers.

Like other pages, we can expand, or collapse, cards by clicking on either the header information or the toggle accordion icon on the right.

However, since we **collapsed all**,when we expand...go ahead...

<no audio> Click to expand the August benefit set.

Buttons 3

It only expands one level.

We can do the same to expand the Issuance card, but how do you think we re-expand all our cards? Go ahead. Click for a hint.

<no audio> How do we re-expand all our cards? Click for a hint.

<audio – hint> Click the Expand All button to re-expand all cards.

Search 1

In the top panel, we can search for benefits issued during a specified time period.

The default Start Date is the PFDTU of the very first benefit set, and the End Date is the LDTU of the last set issued.

Go ahead and click the Status dropdown.

Search 2

We can filter by whether benefits have been voided.

Go ahead and select Voided.

BENEFITS HISTORY

Search 3

And click the Search button.

Void 1

Toggle on, or click on, the one voided set.

Void 2

Voided benefits display Void and the voided date in the Issuance card header, in the Status column (along with the quantity of the item that was voided), and in the Details.

Legacy 1

Like elsewhere in WINNIE, the italic L indicates the benefits were issued and voided in the Legacy, or previous, Information System.

Search 4

We can filter by benefit dates as well, such as if we only wanted to see the benefits issued and voided in 2023.

Let's do that.

Click three times into the Start Date field.

Search 5-6

<no audio> Click three times into the Start Date field.

Search 7

Type 1/ 1/ 23.

Search 8

We want to see all benefits, so select All from the Status dropdown.

Search 9

<no audio> Select All from the Status dropdown.

Search 10

Click Search.

BENEFITS HISTORY

<no audio> Click the Search button.

Reset 1

We can return the entire page to our original view by clicking the Reset button. Go ahead.

<no audio> Click the Reset button.

Participant Menu 1

We have one more thing to look at.

Go ahead and switch to Noel's Benefits History. Click for hints.

<audio – hint> Click the Participant Menu (the participant's name in the header).

Participant Menu 2

<no audio> Switch to Noel's Benefits History. Click anywhere for hints.

<audio – hint> Select Bull, Noel from the Other Household Members list.

Direct Ship 1

We direct shipped half of Noel's full September package and issued the rest to the Electronic Benefit Account.

Toggle on, or click on, Noel's full September benefit set.

Direct Ship 2

There are two Issuance cards because Direct Shipped benefits have their own issuance ID.

Status 1

In general, the Status for benefits sent to the WIC Processor in Details is not as relevant as the Status found in the Issuance card's grid.

Let's minimize this Issuance card.

Status 2

However, for Direct Shipped benefits, which have "Direct Shipped" in the Issuance card's header, the Status for the Direct Shipped benefit is a reliable indicator of whether the benefit has been Paid and will indicate so once the PFDTU is the current date or in the past.

End Slide

We will see how adjusting benefits affects the Benefits History in the Adjust Benefits training modules.

<Transition Slide>

<screen description – no audio> Slide transitions to Test Your Knowledge slide.

Test Your Knowledge

T/F Q#1

True or False?

We only keep five years of benefit information in WINNIE.

Answer #1

The answer is False.

Due to the amount of information that needs to be stored for benefits, we only keep **three** years of benefit information in the WINNIE Production/Clinic environment. After three years the information is archived to another database until the 6-year retention requirements are met.

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.

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