

Change Household ID 1A – WINNIE Online Training Module

JUNE/JULY 2024

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is an overview of how to change the Household ID in WINNIE, the MN WIC Information System.

Date 1

All dates in this module are based on today's date being June 27, 2024.

Change Household ID Overview

Overview 1

There are instances whereby we will need to give a participant a new Household ID or return them to their previous Household ID.

Some examples are if an infant or child is moved into or out of foster care, if we accidentally add a new participant to the wrong existing household, or if a participant dies.

Foster Care and Change HH ID

Foster Care 1

In instances of foster care, as best practice, when mom is part of the household, children should always be given the new Household ID, while mom should always keep the family's original Household ID.

We should also write an alert to inform future staff about a child's foster care status.

Foster Care 2

In most instances, foster parents with multiple children in their care will have multiple WIC Cards to manage since only brothers and sisters from the same family should share the same Household ID.

To help foster parents manage multiple WIC Cards, we should write the child's initials (never their names) on the back of the WIC Card.

<Transition Slide>

<screen description – no audio> Slide transitions to Participant Search page with Erde family.

Scenario

Scenario 1

This is our scenario.

The Erde boys, Buzz and Shep, have been temporarily moved to foster care.

Liz, their mom, is currently certified as pregnant.

All three were issued benefits for June, July, and August.

Their new foster mom, Aida Lott, has come in to get a WIC Card for the boys and we've already reviewed all the necessary paperwork associated with the custody change.

Following best practice, we are going to move Buzz and Shep to a new Household.

Go ahead and look at Shep's details then double-click to open Shep's folder.

Scenario 2

<screen description – no audio> Results of Search Criteria for "Erde" and Details of Shep Erde's folder

<Waiting>

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

Foster Care Toggle

Foster Care 1

We're going to toggle on Foster Care.

We don't have to, but in general, it's good practice to do so.

Go ahead.

Foster Care 2

Here's a tip. We can hit our Enter key to automatically save a change to the Demographics page. Let's do that.

<no audio> Press the Enter key to save the change to Demographics.

<Waiting>

<screen description – no audio> Spin icon displays.

Foster Care 3

Remember, Risk Factor, 903 – Foster Care won't auto-assign; we always have to add it manually.

But we also never have to assign a risk factor outside of the certification.

So, we aren't going to assign it.

Where do you think Change Household ID is found? Go ahead. Click anywhere for a hint.

<audio – hint> Change Household ID is found in the Participant Menu.

Begin Change Household ID Mode

Open CHHID 1

Change Household ID is always enabled regardless of whether the participant is in a cert period or not.

It only disables when a certification or MCA is in progress.

Select Change Household ID from the Participant Menu.

<Waiting>

<screen description – no audio> Spin icon displays.

Open CHHID 2

The Change Household ID Mode opens.

Like both Certifications and Mid-Certification Assessments, a Close button displays at the top and pages that get a checkmark when completed are listed on the sidebar.

Unlike certs and MCAs, all pages are required.

Begin HH Change 1

The first requirement is Determine New Household and it starts with the Begin Household Change modal.

This displays the same information we see at the top of the Manage WIC Account page: primary cardholder, mail address, Household ID, and telephone numbers.

We can click the history icon to view any previous mailing addresses.

Go ahead and do that.

<no audio> Click the Mail Address History icon.

Mail Address History

Mail Address History 1

We saw this before in Demographics.

It has the current address and lists any previous addresses along with who made the change and when.

Click the Close button.

New or Existing Household

Begin HH Change 2

There are two buttons.

We could use the Find Existing Household button if we accidentally added a participant to the incorrect household, when returning a participant to their previous household, or when adding a sibling to a new household we've created, as we'll see today with Buzz and Shep.

Since we are creating a new household for the Erde boys, we click that button.

Go ahead.

<no audio> Click the Create New Household button.

Create New Household

Determine New HH 1

The Create New Household page is similar to Prescreen.

We collect basic demographic information, which we'll add on the backend.

Click below the scroll bar.

Heard About WIC 1

How Heard About WIC is required even though we already completed it when we originally prescreened the Erde family.

Go ahead and click the dropdown.

<no audio> Click the How Heard About WIC dropdown.

Heard About WIC 2

It makes sense to select Participated Previously since Shep is already a participant.

Go ahead and select it.

<no audio> Select Participated Previously.

Auth Rep 1

Let's enter our new Authorized Representative information for their foster parent, Aida Lott.

Click into the Last Name field and type Lott, click or Tab into the First Name field and type Aida, and select Foster Parent for the Relationship.

Auth Rep 2-6

<no audio> Click into the Last Name field and type Lott, click or Tab into the First Name field and type Aida, and select Foster Parent for the Relationship.

Reason 1

The Reason for ID Change is also required.

Go ahead and click the dropdown.

<no audio> Click the Reason for ID Change dropdown.

Reason 2

We only have 3 reasons: Custody Change, like Shep and Buzz, Correct Date Entry Error because we added a member to the wrong household, or Other (explain in notes), which if we select, we need to make sure we document why.

Select Custody Change.

Determine New HH 2

And click the Save button.

Requirements on Sidebar

Tooltip 1

Once saved, we get our checkmark for the first requirement and the second becomes enabled.

Notice the next three requirements are disabled.

Go ahead and hover over one of them to see why, then click the button to continue.

<no audio> Hover over one of the disabled requirements to view the tooltip then click the button to continue.

TOOLTIP: This step is disabled because the prior step(s) have not been completed.

Review Original Household

Review Original HH 1

Click the next requirement.

<no audio> Select Review Original Household's EBT HH Demographics.

<Waiting>

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

Review Original HH 2

Our next step is to review the original household's eWIC information in case we need to make any changes or deactivate that card.

Deactivate Card

Deactivate Card 1

If we were moving Shep out of a household in which he was the only member, such as might occur if we were returning him from foster care to his original household, the system will ask if we want to deactivate the card when we first open this page.

Since there isn't any reason not to deactivate it...

Deactivate Card 2

...when we click Yes, a second message displays telling us that any changes we make now won't be shown in the Participant Folder until we complete changing the Household ID.

When we click OK it returns us to the first page, gives us a checkmark for the second, and enables the third.

If we re-open the Review Original Household page, the card number will no longer display.

<Transition Slide>

However, there are other members in Shep's household, so back to where we began...

<screen description – no audio> Slide transitions back to original view of the Original EBT Household Demographics page.

Deactivate Card 3

In general, we do not need to deactivate cards when changing Household IDs.

That said, if we were to deactivate this card, we could do that before starting Change Household ID mode or after finishing the change as well.

We aren't making any changes, but we must click Save to get our checkmark and enable the next requirement.

Click the Save button.

Review New Household

Review New HH 1

Click the next requirement.

<no audio> Select Review Original Household's EBT HH Demographics.

Review New HH 2

Now we have to review and update their **new** household's eWIC information, such as assigning other reps, setting the Primary Cardholder, and assigning the WIC Card.

We aren't going to add other reps, but we do need to set Aida as the Primary.

Double-click the Auth Rep row, type Aida's birth date of 5/13/87, and set her as the Primary Cardholder.

Review New HH 3

<no audio> Double-click the Auth Rep row, type Aida's birth date of 5/13/87, and set her as the Primary Cardholder.

<audio – hint> Click into the Date of Birth row.

Review New HH 4

<no audio> Double-click the Auth Rep row, type Aida's birth date of 5/13/87, and set her as the Primary Cardholder.

Review New HH 5

<no audio> Double-click the Auth Rep row, type Aida's birth date of 5/13/87, and set her as the Primary Cardholder.

Review New HH 6

<no audio> Double-click the Auth Rep row, type Aida's birth date of 5/13/87, and set her as the Primary Cardholder.

<audio – hint> Click the Authorized Rep row to select it.

Review New HH 7

<no audio> Double-click the Auth Rep row, type Aida's birth date of 5/13/87, and set her as the Primary Cardholder.

Updating Previous Requirements

Update Completed 1

Before we add the card, it occurs to us that we forgot to add the telephone comment indicating the number is Aida's cell.

So, let's save our changes to this page and go back to add the comment.

Click Save.

<no audio> Click the Save button.

Update Completed 2

Since we saved, the checkmark displays.

Like the previous page, no changes are required, and we don't have to make any changes to the new EBT Household Demographics while in Change Household ID mode.

The only requirement is to click Save.

Select Determine New Household from the sidebar.

Update Completed 3

All changes made while in Change Household ID mode are temporarily stored until we complete all the requirements.

This provides us with the flexibility needed to update previous steps, and as we'll see in a minute, interrupt the Change Household ID process if necessary.

Go ahead and click into the first Comment field.

Update Completed 4

And type: Aida's Cell.

Update Completed 5-6

Click below the scroll bar and click the Save button.

Update Completed 7

Let's return to the Review New Household's EBT Household Demographics page.

Select that from the sidebar.

<no audio> Select Review Original Household's EBT HH Demographics from the sidebar.

<Waiting>

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

Incomplete Change Household ID

Interrupt 1

Before we could continue, Aida received a phone call from school about one of her other foster children and had to leave before we could finish.

Like certs and MCAs, we can close the Change Household ID Mode before completing all the requirements.

Click the Close button.

<Waiting>

<screen description – no audio> Spin icon displays.

Interrupt 2

Again, like certs and MCAs, when we exit Change Household ID Mode, the Benefit Management menu continues to be locked and the entire participant folder is locked, meaning no changes are allowed until it's completed.

Unlike certs and MCAs, this includes writing alerts and notes.

Go ahead and close the folder.

<no audio> Select Search from the sidebar.

End Slide 1

We'll continue this household ID change in the next module.

Click the button to continue.

Knowledge Test

True/False Q#1

True or false?

If mom is part of the household but not in a current certification period, and the children are entering foster care, we should still create a new household for the children.

Answer #1

The answer is true.

In instances of foster care, as best practice, when mom is part of the household even if she isn't in an active cert, children should always be given the new Household ID, while mom should always keep the family's original Household ID.

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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