

# Change Household ID 1C – WINNIE Online Training Module

JULY 2024

## Introduction

### Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is a continued 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 July 1, 2024.

## Scenario

### Scenario 1

In this module, we'll move Buzz to an existing household.

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

<no audio> Open Buzz's Participant Folder.

<Waiting>

<screen description – no audio> Spin icon displays.

## Foster Care Toggle

### Foster Care 1

Go ahead and toggle on Foster Care for Buzz as well.

<no audio> Toggle on Foster Care.

### Foster Care 2

Again, let's hit the Enter key to save our change.

<Waiting>

<screen description – no audio> Spin icon displays.

## Foster Care 3

Now let's open Buzz's Benefit History.

## Benefits History – Recovered Food Items

### Benefits Hx 1

Open Buzz's June 11<sup>th</sup> benefit set.

### Benefits Hx 2

In the last module, Shep still had some issued food items even though we had recovered them when adjusting benefits while changing his household ID.

However...

### Benefits Hx 3

Since food items issued to more than one member of the family are combined for an aggregated household total, the WIC Processor may remove (or recover) the items, or some of the amounts, from multiple members in the original household.

Moving on.

Go ahead and open Change Household ID mode for Buzz. Click anywhere for a hint.

<audio – hint> Click the Participant menu.

## Change HHID to Existing Household

### Change HHID – Existing 1

<no audio> Open Change Household ID mode.

<Waiting>

<screen description – no audio> Spin icon displays.

### Change HHID – Existing 2

We are adding Buzz to Shep's new household.

This time we click the Find Existing Household button. Go ahead.

### Change HHID – Existing 3

Buzz's current household information displays at the top of the page followed by our Search criteria.

We can search using Household ID or the Authorized Rep's name.

We jotted down Shep's Household ID, so let's use that to search.

Click into the Household ID field and type 1000085 then click Search or press the Enter key.

### Change HHID – Existing 4-4A

<no audio> Click into the Household ID field and type 1000085 then click Search or press the Enter key.

### Change HHID – Existing 5

The Results grid shows the Household ID, the Authorized Rep for that household, their address, and their telephone number.

There is also a toggle to select the row since searching by Auth Rep could result in multiple rows.

Go ahead and toggle on the row.

### Change HHID – Existing 6

Everything else will copy over but we have to select the Reason for ID Change again.

Go ahead and select the appropriate reason.

<no audio> Select the appropriate Reason for ID Change.

### Change HHID – Existing 7

<no audio> Select the appropriate Reason for ID Change.

### Change HHID – Existing 8

Click Save.

<no audio> Click the Save button.

## Review Original Household

### Review Original HH 1

The requirements are the same.

We aren't making any changes to either household's EBT Demographics, so do what needs to be done then open Adjust Benefits.

Click anywhere for a hint.

<no audio> Complete the next two requirements then open Adjust Benefits. Click anywhere for a hint.

<audio – hint> Select Review Original Household's EBT HH Demographics from the sidebar.

### Review Original HH 2

<no audio> Complete the next two requirements then open Adjust Benefits. Click anywhere for a hint.

<audio – hint> Click the Save button.

## Review New Household

### Review New HH 1

<no audio> Complete the next two requirements then open Adjust Benefits. Click anywhere for a hint.

<audio – hint> Select Review New Household's EBT HH Demographics from the sidebar.

### Review New HH 2

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

<no audio> Complete the next two requirements then open Adjust Benefits. Click anywhere for a hint.

<audio – hint> Click the Save button.

## Adjust Benefits

### Adjust Benefits 1

<no audio> Complete the next two requirements then open Adjust Benefits. Click anywhere for a hint.

<audio – hint> Select Adjust Benefits from the sidebar.

## Adjust Benefits 2

<Waiting> <screen description – no audio> Spin icon displays.

Remember, Adjust Benefits displays only the food items issued to the current benefit set and not any foods, or amounts, that have been recovered.

Click the button to continue.

## Adjust Benefits 3

No matter what we do on this page, any amounts in the Remove column will be recovered from the original household account when we complete the Household ID change.

We should note that we can set any of the Remove amounts to zero to ensure the food item isn't removed from the household's account and we should look to our agency for any instances where that might be appropriate to do.

## Adjust Benefits 4

Since food items purchased by the family mostly likely stay with the family, we can use the Reissue Full Set toggle to issue a new set of benefits to Buzz, regardless of what foods have already been purchased.

This means that if all of the foods or formula have been purchased for the participant, we can still reissue a full set.

Go ahead and toggle on Reissue Full Set.

## Adjust Benefits 5

As we mentioned previously, this toggle is linked to the Package Size dropdown.

Go ahead and click the dropdown.

<no audio> Click the Package Size dropdown.

## Adjust Benefits 6

These are the same sizes we see in Issue Benefits.

If a prorated set was originally issued, best practice would be to reissue the same package size.

This set wasn't prorated. Go ahead and click the Save button.

## Adjust Benefits – Food Rx 1

<Waiting> <screen description – no audio> Spin icon displays.

The Food Prescription modal opens when we toggle on Reissue a Full Set and lists the default or tailored food package that was originally issued and creates a new food package with the Effective Date of today.

This works the same as the Food Prescription page and only changes must be saved.

We aren't making any changes so click the Cancel button.

## Complete Change Household ID

### Complete CHHID 1

Go ahead and complete the Household ID change.

<no audio> Complete the Household ID change.

### Complete CHHID 2-5

<no audio> Complete the Household ID change.

## Benefits History After Change HHID

### Benefits History 2-1

<Waiting> <screen description – no audio> Spin icon displays.

Buzz has been added to Shep's household.

In Benefits History...go ahead and open it...

<no audio> Select Benefits History from the sidebar.

### Benefits History 2-2

...and we're just going to collapse the filter and open all the benefit sets behind the scenes...

<screen description – no audio> Slide transitions to all sets toggled on.

### Benefits History 2-3

We can see that all of Buzz's original June benefits have been recovered.

Expand the July 1 benefit set.

<no audio> Expand the 7/1/24 set.

### Benefits History 2-4

The full set has been reissued with a PFDTU of today and the same LDTU.

Expand the July 11 benefit set.

<no audio> Expand the 7/11/24 set.

## Benefits History 2-5

The July set has been voided.

Expand the August 11 benefit set.

<no audio> Expand the 8/11/24 set.

## Benefits History 2-6

As have the August benefits.

Let's take a quick look at the Food Prescription page.

<no audio> Select Food Prescription from the sidebar.

## Food Prescription after CHHID

### Food Prescription 1

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

A new food prescription was created for today and as best practice, we should always double-check the food items and their quantities to make sure they are correct for future issuances.

Go ahead and expand the July 1 food prescription.

<no audio> Expand the 7/1/24 food prescription.

### Food Prescription 2

All looks good.

Last step is to reissue future benefits for both Buzz and Shep.

Select Issue Benefits from the sidebar.

<Waiting>

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

## Issue Benefits

### Issue Benefits 1

Since Buzz and Shep are due for a recert in September, we'll just issue July and August.

Toggle off September for Shep then Buzz, click below the scroll bar, and complete issuing benefits.

### Issue Benefits 2-4

<no audio> Toggle off September for Shep then Buzz, click below the scroll bar, and complete issuing benefits.

### Issue Benefits 5

Click below the scroll bar to review the food packages as best practice dictates.

<no audio> Toggle off September for Shep then Buzz, click below the scroll bar, and complete issuing benefits.

### Issue Benefits 6

<no audio> Toggle off September for Shep then Buzz, click below the scroll bar, and complete issuing benefits.

<audio – hint> Click the Send eWIC Data button.

### <Waiting>

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

### Issue Benefits 7

<no audio> Toggle off September for Shep then Buzz, click below the scroll bar, and complete issuing benefits.

<audio – hint> Click the Close button.

### <Waiting>

<screen description – no audio> Spin icon displays.



## View Change Household ID History

### View CHHID History 1

Our last step is to write an alert to immediately inform the next staff person that this is a foster care situation and as a reminder to ask if there have been any changes to their foster care status and, although we don't have to, we want to add the original household ID to our alert.

We didn't write it down before, but we can find their original Household ID in the View Household ID Change History modal.

Where would you expect to find this? Go ahead. Click anywhere for a hint.

<no audio> Where would you expect to find the View Household ID Change History modal? Click anywhere for a hint.

<audio – hint> Click the Participant Menu.

### View CHHID History 2

Since it's alphabetical, it is near the bottom of the Actions list.

Go ahead and select it.

<no audio> Select View Household ID Change History.

### View CHHID History 3

Any changes to a participant's Household ID displays in this list, including when, the Household ID that was changed, the Household ID it was changed to, why and who completed the change.

We're going to jot down his original Household ID.

Click the Close button.

## Priority Alert

### Alert 1

OK. We're going to create a Priority alert with the subject of Custody.

Go ahead and get us started. Click anywhere for a hint.

<no audio> Create a Priority alert with the Subject of Custody. Click anywhere for a hint.

<audio – hint> Select Manage Alerts from the sidebar.

### Alert 2

<no audio> Create a Priority alert with the Subject of Custody. Click anywhere for a hint.

<audio – hint> Click the Add button.

### Alert 3

<no audio> Create a Priority alert with the Subject of Custody. Click anywhere for a hint.

<audio – hint> Toggle on Priority.

### Alert 4

<no audio> Create a Priority alert with the Subject of Custody. Click anywhere for a hint.

<audio – hint> Click the Subject dropdown.

### Alert 5

<no audio> Create a Priority alert with the Subject of Custody. Click anywhere for a hint.

<audio – hint> Select Custody.

### Alert 6

Click into the Alert Text field and we'll quickly type an alert.

### Alert 7

<screen description – no audio> Alert text: Both Buzz and Shep are in foster care. Please verify their situation has not changed. Mom's HHID, and her original HHID, is 13700215. The sticky note shows HHID 10000085 and Original HHID 13700215.

We'll add their original ID just as a reference, in case the children can be returned to their mom's household.

### Alert 8

Go ahead and save the alert.

<no audio> Click the Save button.

### End Slide 1

This concludes our first scenario in our review of Change Household ID.

Click the button to continue.

## Knowledge Test

### Multiple Choice Q#1

Which statement is **not** true?

- A. The amounts in the Remove column will be recovered when we complete the Household ID change.
- B. We can set any of the Remove amounts to zero.
- C. We can use the Reissue Full Set toggle regardless of the amounts of foods already purchased.
- D. Food items will only be recovered from the specific member of the household for whom the household ID is being changed.
- E. If a prorated set was originally issued, best practice would be to reissue the same package size.

### Answer #1

The answer is D.

The WIC Processor may recover food items shared by multiple members of the household from any of those household members originally issued benefits.

## End

### End Slide 2

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.*

*This institution is an equal opportunity provider.*