

Change Household ID - Direct Shipped Formula

SEPTEMBER 2024

If you are changing the Household ID for a participant issued formula by **direct ship** for the current month's benefits, WINNIE **automatically returns then reissues the same cans of formula via direct ship**.

The following steps will assist you with addressing this automatic functionality.

Training Modules

- [Change Household ID 2A](#)
- [Change Household ID 2B](#)

Open Change Household ID Mode

- Open the folder of the participant whose Household ID you are changing.
- Click the Participant Menu >> select Change Household ID.

Step 1: Complete First Three Requirements

- Determine New Household (create new or find existing). Complete "prescreen" and Save.
- Review Original Household's EBT HH Demographics. Click Save to complete.
- Review New Household's EBT HH Demographics. Assign a WIC Card if one hasn't been assigned. Click Save to complete.

Step 2: Adjust Benefits

Redemption is shown in the Household Balance column.

If all formula or food items have been purchased, the HH Balance will be 0.00 and the Remove quantity will also be 0.00.

If all of a formula was direct shipped, 0.00 displays in the HH Balance column.

If some formula was direct shipped and some issued to the WIC Card, the Household Balance will display the Issued amount minus the direct shipped amount (minus any redemption).

Ex: 2 cans Gentlese direct shipped and 6 issued to card. Issued = 8; HH Balance = 6. If any redemption, HH Balance = 6 minus the number of cans purchased.

- Select **Adjust Benefits** from the sidebar.
- Reissue Removed Quantity?

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- YES – recover the suggested Remove amounts from the original household’s account and issue to the new household account.
 - Default toggled on.
 - Click the **Save** button on the Adjust Benefits page.
- NO – Reissue Full Set.
 - **Toggle Reissue Full Set** on.
 - If original issuance is decreased indicating proration, select the appropriate Package Size.
 - Women/Children: only milk is decreased.
 - Infants: formula, infant fruits/vegetables, and infant meats are decreased.
 - Not sure if prorated?
 - Close Change Household ID, verify in Benefits History, and Resume Change Household ID.
 - Click the **Save** button on the Adjust Benefits page.
 - The *Food Prescription* modal opens.
 - Verify the food prescription is correct.
 - The amounts in the Food Prescription should reflect what would be issued if there isn’t any proration (just like the Food Prescription page in the Participant Folder). If there is proration, and a different Package Size has been selected, the system will prorate the food items when the benefits are issued.
 - Click **Cancel** if no changes. Otherwise, click the Save & Close button.

Step 3: Complete Household ID Change

- Select **Complete Household ID Change** from the sidebar.
- The *Issue Benefits* modal opens with the option to direct ship formula.
- Is any formula being direct shipped to the new household?
 - YES – some or all formula is being direct shipped.
 - **Toggle on Direct Ship** for that formula.
 - The *Direct Shipped Items* card will display.
 - Select **In Stock** from the *Ship To* dropdown.
 - Enter the **number of cans being direct shipped** into the *Direct Ship Quantity* field.
 - Click the **Save** button.

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- If any other formula or food items are being issued to the WIC Card, the *Aggregated Issuance* modal opens. Review the formula/food being issued to ensure it is correct.
 - Click the **Send eWIC Data** button.
- NO – all formula is being issued to the WIC Card.
 - Click the **Save** button.
 - The *Aggregated Issuance* modal opens. Review the food being issued to ensure it is correct.
 - Click the **Send eWIC Data** button.
- Click the **Close** button.
- Click **OK** on the *Information* message indicating all future benefits (including direct shipped items) have been voided.
- Click **OK** on the “Household ID change complete” message.

Step 4: Verify Benefits History

- Select **Benefits History** from the sidebar and verify WINNIE automatically:
 - **Returned** the direct shipped cans from the original issuance.
 - **Direct Shipped** the same number of cans that were originally direct shipped.
 - This will occur if none, fewer, or the same number of cans of formula are direct shipped during Change Household ID.
 - This can look like over-issuance because it is **in addition to** what you issued, even if you re-issued the full amount.

Step 5: Return the Automatically Direct Shipped Cans of Formula

- Select **Adjust Benefits** from the sidebar.
- **Return** the number of cans that were automatically direct shipped by WINNIE.
 - This number should show as a negative value in the *Available* column.
- Click the **Send eWIC Data** button.

Step 6: Document Discrepancy in Returned Cans

- Were the same number of cans returned as were automatically returned by WINNIE?
 - YES – you are done. 😊
 - NO – document what was actually returned in a note.
 - Select **Manage Notes**.

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- Add a **General Note** with the subject of **Benefit Issuance**.
 - Indicate the number of cans that were returned (if any) and why the discrepancy.
 - Example: <#> cans <formula name> direct shipped on <current date> were NOT returned. WINNIE shows returned due to HHID change.
- Click the **Save** button.

Reference – Complete Listing of Hyperlinks

Change Household ID 2A Training Module

(<https://www.health.state.mn.us/training/cfh/wic/winnie/changehhid2a/index.html>)

Change Household ID 2B Training Module

(<https://www.health.state.mn.us/training/cfh/wic/winnie/changehhid2b/index.html>)

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