



Idaho WIC Training

Issuing Benefits

Trainer



WIC is an equal opportunity provider.

What Will They Learn?

- Issuing eWIC Food benefits
- eWIC Balance
- Voiding eWIC Benefits
- Retailoring a Food package
- Reissuing Formula

Instruction Level

Prerequisite for taking this course:

- WIC Food Package Guidebook
- eWIC Card and Cardholders Guidebook
- Assigning Benefits Guidebook

Items Needed for this Course

The Idaho WIC website wic.dhw.idaho.gov houses all the online materials for staff under the Staff training page.

- Idaho WIC Food List (their location in your clinic)
- Idaho WIC Mother & Infant Food Issuance Grid at Staff > Training > Breastfeeding
- Access to the WIC website for the Reasons Document at Staff > Training > Basics
- Access to WISPr UAT to practice issuing, voiding, and reissuing benefits
- eWIC Card Brochure
- First and Second Cardholder Job Aid
- Trouble shooting shopper issues Job Aid
- WIC Shopper Presentation at Staff > Training > Food Benefits
- Your Clinic's Procedure Guides

Recommended Time

- Approximate time it takes to complete the WIC course: 2-4 hours
- Approximate time it takes to complete the activity and discussion: 1-2 hours



Activity 1

The participant will be asked to go to the WIC computer system training environment and practice assigning, tailoring, and issuing benefits for different categories.

Please assist the learner with finding an active infant, child, and a Breastfeeding or Non-Breastfeeding woman participant (recommend searching by DOB). They will use these to practice issuing benefits for different categories.

(Write down the PID Numbers. These participants will be used throughout this guidebook.)

- PID: _____ Infant
- PID: _____ Child
- PID: _____ Woman

Steps Outlined:

- Go to the Assign Food Package screen and then the Issuance screen to practice issuing benefits.
- NOTE: You will need to complete the BF% tab for the infant.
 - Go to Nutrition Assessment
 - Select Health Assessment
 - Select the Breastfeeding %tab
 - On the drop-down list, select 0%
 - Save
- Click on eWIC Benefits in the left navigation panel.
 - Note: if the participant has food packages already assigned for the current month please try assigning future months (you will be learning to void packages later in this guidebook).
- Assign Food Package screen appears.
 - Assign the computer-generated base food package for the participant.
 - Click Save and look at the name of the package after it's saved.

- Now you are returned to the Assign Food Package screen.
 - For the infant with a soy-based formula, move to the Issuance screen and issue the food package.
 - For the child with evaporated or powdered milk, move to the Issuance screen and issue the food package.
 - For the woman with additional milk and no cheese or yogurt, move to the Issuance screen and issue the food package.

Please be prepared to discuss any questions that the learner might have.



Activity 2

The learner will practice looking up eWIC balances and eWIC Activity details.

Please assist the learner with going to the WIC computer system training environment and practicing viewing the eWIC Balance and eWIC activity function.

Assist the learner with finding the active infant- any age, child- any age, and the Breastfeeding or Non-Breastfeeding woman participant (recommend searching by DOB) used previously.

(Write down the PID Number. This same participant will be used throughout this guidebook).

- PID: _____ Infant
- PID: _____ Child
- PID: _____ Woman

Steps Outlined:

- Click on eWIC Benefits in the left navigation pane.
 - Click on eWIC Balance screen and see how it displays.
 - Click on eWIC Activity screen and see how it displays.

Please be prepared to discuss any questions that the learner might have.



Activity 3

The learner will ask about the remote load policy and procedures of the clinic.



Activity 4

The learner will practice voiding benefits for a participant. You may need to assist them in finding an active B and an active N participant. Please go to the WIC computer system training environment and practice voiding benefits for your woman participant.

Assist the learner with finding the active (B) Breastfeeding or (N) Non-Breastfeeding woman participant to use.

- PID: _____ Woman

Steps Outlined:

- Click on eWIC Benefits in the left navigation panel.
- If your woman participant is listed as an (N) and 0% BF follow these steps:
 - Go to the infant's participant page.
 - Click on Nutrition Assessment on the left navigation pane to update the breastfeeding percentage for the infant.
 - Under Health Assessment, go to the Breastfeeding % tab.
 - On the drop-down list, select 100%.
 - Save.
- Go to the mom's participant screen.

- Click on Certification on the left navigation pane.
 - Select the Change Category button to switch from N to B.
 - Save
 - Note- if button is unavailable, you will need to select Terminate Cert, refresh as a B, and recertify the participant.
- Click on eWIC Benefits in the left navigation panel.
- Go to Void Future Benefits screen.
 - Select current and future benefits.
 - Enter "Breastfeeding % increase" as the reason
 - Select void benefits button
- Assign Food Package screen opens.
 - Assign and tailor a food package for the participant.
- Move to the Issuance screen to issue packages for the mother

If your woman participant is listed as a (B) and 50% or greater BF amount, follow these steps:

- Find the participant given to you in WISPr.
- Go to the infant's Participant Summary page.
- Click on Nutrition Assessment on the left navigation panel. This is where you will update the breastfeeding percentage for the infant.
 - Under Health Assessment, go to the Breastfeeding % tab.
 - On the drop-down list, select 0%.
 - Save.
- Go to the mom's Participant Summary screen.
- Click on Certification on the left navigation panel.
 - Select the Change Category button to switch from a B to an N.
 - Save
- Click on eWIC Benefits in the left navigation panel.
 - Notice that mom still has a FP 7 issued for current and future months.
- Click on Void Future Benefits.
 - Void future months that have an FP 7 but leave current month as an FP 7.
 - Note: Now that the mom is a category "N" she may have too many months of benefits or may not qualify for a food package depending on the age of the infant. You will have to manually void any extra months that are issued if category or BF percentage is changed in a way that should make the mom ineligible past the baby's 6-month birthday.
- Click on Assign Food Package.
 - Assign and tailor a food package for the participant.
- Move to Issuance and check issue package the mother and save if applicable.

Please be prepared to discuss any questions that the learner might have.



Activity 5

The learner will practice retailoring a food package for a child or woman participant.

Trainer, please e-mail the help desk and ask for benefits to be redeemed for a child or woman participant account of your choice so the learner can practice retailoring a food package. In your e-mail, please include the PID and card number for the participant whose benefits should be redeemed. Before you do this make sure that a PIN is set on the card and that benefits have been issued to the participant.

Steps Outlined:

- Go to the Participant Summary screen.
- Click on eWIC Benefits in the left navigation panel.
- Go to Void Future Benefits screen.
 - o Select the months to void and click the Void Benefits button.
- Go to Retailor Food screen.
 - o This screen will allow you to retailor the current month of used or partially used benefits.
 - o The foods are in what we call "food baskets." The foods within those baskets are called "subcategories." They are separated by boxes.
 - o Find the foods the participant wants to retailor and adjust accordingly.
 - o When adjusting benefits, fill in the amount to substitute/remove a product. You can reduce and increase the subcategories within the limits. If you are over/under the amount allowed, you will see a black exclamation mark. If you hover over it, it will tell you if you are over or under the amount allowed.
 - o Add notes, if applicable.
 - o Once you have made your changes and do not see error messages, click save.

Note: Staff can see these changes in a few places: eWIC Balance screen will show new benefits loaded to the account, Assign Food Package will show the new package with R* = reissue or RT = retailor, and Issuance History will show the voided and reissued benefit.

- Go to the Assign Food Package screen

- Ensure the changes that were completed on the retailer screen are completed for the following months of benefits on the tailor screen.
 - Select the base food package from the drop-down and click the Tailor button.
 - Save your selections.
 - Now you can issue the future months that have not been used and voided in the initial steps.
- Move to the Issuance screen to issue the package.

Remember- Retailoring a food package does have a limit, one participant per family per month.

Please be prepared to discuss any questions that the learner might have.



Activity 6

1. Please assist the learner with finding the clinic policy for returned formula disposal.
2. Assist the learner with finding an active infant who has been issued formula.
 - PID: _____ Infant

The participant’s mother comes to the clinic with an MDF from the Healthcare Provider. The infant has a need for Alimentum due to a severe milk protein intolerance.

To check for redemptions please view the participants eWIC Activity page. When redemptions have occurred, use the Reissue Formula screen. In order to be able to practice reissuing formula in this scenario, it won’t matter if redemptions have occurred.

Please exchange the current formula on the infant’s account for Alimentum. Remember to enter a special authorization for the Alimentum.

Steps Outlined:

- Find the participant needing formula reissued.

- NOTE: If it is an infant 0-12 months of age, you will need to complete the BF% tab for the infant.
 - Go to Nutrition Assessment
 - Select Health Assessment
 - Select the Breastfeeding %tab
 - On the drop-down list, select 0%
 - Save
- Click on eWIC Benefits in the left navigation panel.
- Enter an MD Doc- special authorization.
- Go to the Reissue Formula screen.
 - This screen will allow you to reissue the current month of fully or partially used formula benefits.
 - Fill in the following boxes:
 - Quantity to Void (enter the amount to match the remaining balance – at the end, you will be able to reissue the maximum amount regardless of what you void and/or returned as long as it is within their allowable amount).
 - Formula Returned Quantity, if applicable.
 - Note: Please enter a note that explains why the formula is changing or being added for a participant
 - Replace Formula: Select from the drop-down the formula to reissue. Enter the number of containers to reissue (use the amount calculated in the equivalent containers to help). The units voided/removed, units returned by the client, and equivalent containers to reissue should auto-fill once the sections above are completed. The equivalent containers may give a range. This amount may be impacted by participant age, container size, reconstitution amounts, or BF% entered in the BF% tab.
 - Save

Note: Staff can see the changes in a few places: The eWIC Balance screen will show new benefits issued to the account, Assign Food Package will show the new package with R* or RT to represent reissue or retailer, and Issuance History will show the voided and reissued benefit months.

- Go to the Assign Food Package screen.
 - Ensure the changes that were completed on the reissue screen are completed for the following months of benefits on the tailor screen.
 - Select the base food package from the drop-down and click the Tailor button.
 - Save your selections.
 - Now you can issue the future months that have not been used and voided in the initial steps.
- Move to the Issuance screen to issue the package.

When a participant doesn't have a formula or nutritional on the account and needs it, and benefits have been spent, use the reissue screen. The reissue screen will look a little bit different and you do not have to fill out the Formula to Void section or formula returned section. Please ensure the following sections are completed.

- Notes: Please enter a note that explains why the formula was added for a participant.
- Replace Formula: Select from the drop-down the formula to reissue. Enter the number of containers to reissue (use the amount calculated in the equivalent containers to help). The equivalent containers field may give a range. This amount may be impacted by age, container size, reconstituted ounces, or BF% entered in the BF% tab.
- Save.

Please be prepared to discuss any questions that the Learner might have.



Activity 7

The learner will be asked to observe two participants being issued eWIC benefits and answer the following questions during their observation:

- Was the participant shown what benefits were on their account?
- Did the participant have any questions about their available benefits?

Please be prepared to discuss any questions that the learner might have.