

eWIC Training Workbook

Welcome!

- Training is from 9:00 a.m. to 4:00 p.m. with an hour for lunch.

Agenda

Activity 1	Getting Started <ul style="list-style-type: none">○ Log into Citrix and TWIST Practice
Activity 2	Converting a Single Participant to eWIC <ul style="list-style-type: none">○ Issuing eWIC cards on the Family Cardholder Screen○ Assigning food packages on the Food Package Assignment Screen○ Issuing benefits from the Family Summary Screen○ Providing education on shopping and using the eWIC card
Activity 3	Converting a Family to eWIC <ul style="list-style-type: none">○ Changing food packages on the Food Package Assignment Screen○ Completing the Med Doc screen○ Using the Card Reader and setting the PIN (use a real card!)○ Shopping – Shop at our eWIC store○ Check your benefit balance
Lunch	
Activity 4	Cards and Cardholders, Food Package Modifications, and Formula Warehouse <ul style="list-style-type: none">○ Change cardholders and replace cards on the Family Cardholder Screen○ Modifying foods when benefits have been issued○ Issuing formula from the Formula Warehouse
Activity 5	Food Package Modification and Formula Exchange <ul style="list-style-type: none">○ Modifying a food package when benefits have been spent○ Formula exchange or replacement
Activity 6	Miscellaneous <ul style="list-style-type: none">○ Terminations and benefit removal○ Changing vouchers after conversion○ What can you do over the phone?○ Issuing benefits in the last 5 days of the month○ Unusual food packages
Wrap Up	Resources and Next Steps

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ABCDE of eWIC conversion

- A.** Assign benefits (check the FPA and save the correct food package)
- B.** Benefits issued (on FSS)
- C.** Cardholder assigned and eWIC card issued (on FCS)
- D.** Documents signed (review Rights and Responsibilities and sign a new Participant Signature form)
- E.** Educate the shopper (print a Benefits List and provide shopper education)

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Activity 1 - Getting Started in PSOB

Introduction

Welcome to eWIC training! Let's get logged into the computer and the TWIST Practice Database.

Practice Activities Information

➔ **Log into the computer using the login information below**

Login	.\publichealth
Password	publichealth
Selection	This computer

➔ **Open Citrix and login (Use icon or favorite on Internet Explorer)**

Login	Your P number
Password	Your normal password

➔ **Login to FamilyNet Practice**

Login	training# (#posted on desk)
Password	training# (#posted on desk)
Agency	Select agency given by the trainer



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➤ *Finding your participant*

- ▶ Each agency in the Practice Database has a complete set of practice participants (e.g. 14 versions of Samantha Seaside)
- ▶ To tell the difference between participants in each agency, every participant has their agency in their middle name (e.g. Samantha Baker Seaside)
- ▶ To tell the difference between the 14 participants within the agency, each participant has a different letter in their middle name (e.g. Samantha Baker-A Seaside)

Participant name	Look for your assigned agency name and the middle initial given by the trainer
Search by Agency	Select agency given by the trainer

➤ *Assigning eWIC card numbers*

- ▶ For this training we will use both real and virtual eWIC cards.
- ▶ Use the list of virtual eWIC card numbers given to you by the trainer to assign to families.
- ▶ As you assign each virtual eWIC card, mark on the spreadsheet the participant ID of the family you issued the card to.
- ▶ We will give you a real (plastic but no pretty picture) eWIC card to assign and use for shopping.

Note: Each month on the 1st, the Practice Database and the virtual eWIC cards are refreshed. This means participants you worked on and eWIC card numbers can be reused each month.

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Activity 2 - Converting a Single Participant to eWIC

Introduction

Once your agency has reached its Agency Conversion Date, every family record in WIC will need to be accessed to complete the participant and family conversion to eWIC. A mom is in your clinic for a scheduled appointment for her 5 month old.

Practice Activities Information

Family Cardholder Screen

- Search for your assigned client and return with the client.

Julie [agency and middle initial] **Tidewater** from your agency

- Complete the following information for the First Cardholder:

Cardholder Name	Tidewater, Suzy “your middle initial”
Date of Birth	01/01/1991
Relationship	Mom
eWIC card number	<i>Enter the card number provided</i>

- Save

- Complete the following information for the Second Cardholder:

Cardholder Name	Backwater, Shelly
Date of Birth	05/07/1957
Relationship	Grandma
eWIC card number	<i>Enter the card number provided</i>

- Select copy address from first cardholder

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- Save

➤ Fastpath to certification and select the ***Food Package Assignment Screen (FPA)***

- Check the first month eWIC benefits can be assigned
- Review the eWIC food package assignment for appropriateness.
- Save the standard food package on the new (eWIC) “Food Package Assignment” screen

➤ ***Family Summary Screen***

- Issue benefits from the new “Family Summary Screen”
- View the issued benefits by clicking on the “Benefits List” button
- Save and exit



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Activity 3 - Converting a Multiple Participant Family

Introduction

A pregnant woman and her 1 year old child walk in to your clinic because they missed their previous appointment. They will need benefits issued and an eWIC card. Mom has a Medical Documentation form for PediaSure for Brittany.

Practice Activities Information

Family Summary Screen

- ▶ On the “Family Summary” screen, search for and return with the client, **Sophie** [agency and middle initial] **Bates**.
- ▶ Note the EBT dates.
- ▶ Click on the old FSS button and note the EBT dates and any voucher issuance.
- ▶ Click the button to return to the eWIC FSS.
- ▶ Select **Brittany Bates** and Fast Path to the Food Package Assignment screen.

Where will your agency hand out the *eWIC Rights and Responsibilities* document and have them sign the *eWIC Participant Signature* form?

Food Package Assignment Screen

- ▶ Click on the “Special Client” designation.
- ▶ In Module C, choose 36 bottles of PediaSure and forecast for the entire certification.
- ▶ Review Row Summary.
- ▶ Click on the Med Doc Info button for the current month and complete the following information:

Dates	The 1 st of this month through the end of the certification.
Medical Provider	Dr. Salmon
Formula	Check “PediaSure”
Supplemental Foods	Issue Full Provision except eggs

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- ▶ Return to the FPA and modify the foods in Module B as appropriate, forecast Module B for the entire certification.
- ▶ Save
- ▶ Go out the blue door on the FPA to return to the FSS.
- ▶ On the FSS, click on Sophie Bates and Fast Path to the FPA.
- ▶ Make the following changes to Sophie's food package assignment:

Qty A	3.5 gallons of milk
Progress Notes	Mom requests less milk

- ▶ Forecast for entire cert.
- ▶ Click on the blue door to return to the FSS.

➤ Family Summary Screen

- ▶ Issue benefits for entire family.
- ▶ Click the Benefits List button and review.

WIC Benefits List		
Benefits Available as of 07/07/2015 14:25		
WIC Family ID: 753146		
First Cardholder: No Cardholder		Second Cardholder:
Benefits for: 7/7/2015 through 7/31/2015		
Family Member/s: Bates, Sophie A - WP Bates, Brittany A - C1		
Quantity	Unit	Food Item Description
2	LB	Cheese
1	DOZ	Eggs - large
72	OZ	Cereal - hot / cold
2	CTR	Peanut butter / dry beans / peas / lentils
1	CTR	Dry beans, peas or lentils
48	OZ	100% Whole wheat bread/corn tortillas/brown rice
18	\$\$\$	Fruit and vegetables - fresh / frozen
36	BTL	PediaSure
3.25	GAL	Whole milk
3.5	GAL	Lowfat or fat free milk
3	CTR	11.5 to 12 ounce frozen juice
2	CTR	64oz bottle / 16oz frozen juice

- ▶ Fast Path to the Family Cardholder Screen.

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➤ **Family Cardholder Screen**

- › Enter the following information and save:

Cardholder Name	Bates, Sophie
Relationship	Mom
Date of Birth	07/07/1985
eWIC card number	<i>Use the card reader to swipe your card and enter the card number.</i>

➤ **Setting the PIN**

- › Use the following information to set a PIN:

Call Customer Service	1-414-341-3449, then select 2
When prompted for DNIS #	4426
Card Number	First cardholder number
Date of Birth	07/07/1977
Zip Code	97420
PIN	1234

➤ **Shopping for WIC Benefits**

- › Use your card and PIN to shop for the following items:

PediaSure	12 bottles (two six packs)
Fruits and Veggies	Your choice
Cereal	1 box
Milk	Some whole and some non-fat or 1%

- **Call customer service again to listen to your balance.**



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Notes:

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Activity 4 - Cards and Cardholders, Food Package Modifications, and Formula Warehouse

Introduction

Use the family from Activity 2 to practice deactivating and replacing cards and cardholders, and issuing formula from the Formula Warehouse.

Practice Activities Information

Card and Cardholder Actions

- On the “Family Cardholder” screen, search for and return with the client, **Julie** [agency and middle initial] **Tidewater** from your agency.

Client Demographics

- Fast Path to the Client Demographics screen to change the address. Use the following information:

Home Address	1234 N. Oak St. Cannon Beach, OR 97110
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- Save

Family Cardholder Screen- Second Cardholder

- Go out the door to return to the Family Cardholder Screen.
- Use the button to Copy the First Cardholder Address to the Second Cardholder.
- Save

Removing Second Cardholder

- Click on the Remove Second Cardholder button.
- Save and view Card History.

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- Add a new Second Cardholder, Teddy Tidewater. Use the following information:

Name	Tidewater, Teddy
Relationship	Dad
Address	1212 East Main Newport, OR 97365
DOB	02/02/1988
Card number	<i>Enter new card number</i>

- Save and view Card History

➔ **Second Cardholder Becomes First Cardholder**

- Click on Change to First Cardholder
- Save and view Card History

➔ **Deactivating and Replacing Cards**

Deactivate and Replace-

- Click on First Card Actions button, then Deactivate and Replace Card.
- Reason- "Lost or Unavailable". Enter a new card number.
- Save and view Card History

Deactivate Only-

- Click on First Card Actions button, then Deactivate (Status) Card.
- Reason- "Stolen". Click on First Card Actions again- only option is to replace the card.
- Save and view Card History

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Food Package Modifications

➤ Food Package Assignment Screen

- ▶ Select the participant from the Cardholder screen and Fast Path to the Food Package Assignment screen.
- ▶ Click on Module A dropdown to see the formula templates that are available to assign.

➤ Modify Pop-up

- ▶ Click on Modify button. Click on the quantity dropdown for Similac and reduce it to zero.
- ▶ Change the infant's formula to Pregestimil by inserting a row and start typing Pregestimil in the subcategory name field. Highlight Pregestimil Powder and click "OK".
- ▶ Modify the next two months from Similac to all Pregestimil.
- ▶ Click on the Med Doc button.
- ▶ Enter-

Start Date	Today's date
End Date	2 months from now
Received	✓
Click	Issue Full Provision of Supplemental Foods

- ▶ Review Row Summary.
- ▶ Save

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Formula Warehouse

➤ Family Summary Screen

- ▶ Fast path to the Family Summary Screen.
- ▶ Issue 2 months of benefits.
- ▶ Select Julie Tidewater and click on Formula Warehouse button.
- ▶ Select “Other” on address field, add:

Other Address	4444 N. Maple Ave. Oceanside, OR 97999
Other Phone	503-555-5555
Note	Please do not leave package on doorstep.

- ▶ Save



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Activity 5 - Food Package Modification and Formula Exchange

Introduction

Food packages are changed for many reasons; food preference and changing formulas are two reasons highlighted in this lesson. The Bates family from Activity 3 is coming back into the clinic to make changes to their milk and formula. They have already spent part of their benefits.

↳ Practice Activities Information

Food package modification:

↻ Family Summary Screen

- ▶ On the “Family Summary” screen, search for and return with the client, **Sophie** [*agency and middle initial*] **Bates**.
- ▶ Click on the Benefits List and review balance.

↻ Food Package Assignment Screen

- ▶ Select Sophie and Fast Path to the Certification Woman screen, select Food Package Assignment screen.
- ▶ Click on the Modify button.
- ▶ Reduce the milk to the amount already spent which is the lowest number you can select.
- ▶ Insert a row, search for Soy beverage and click “OK”.
- ▶ On the FPA, go to next month’s row and select a template for soy.
- ▶ Forecast module A and save.
- ▶ Go back out the blue door to the Family Summary Screen.

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Formula Exchange:

➤ **Family Summary Screen**

- ▶ Select Brittany and Fast Path to the Certification Child screen, select Food Package Assignment screen.
- ▶ Click on the Formula Replacement /Formula Exchange (FR and FX) button and exchange six cans of the formula purchased, click "OK".
- ▶ Click on the Modify button.
- ▶ Reduce the PediaSure to the amount spent and not exchanged.
- ▶ Insert a row for the new formula, Boost Kid Essentials 1.0 and select the correct amount. Click "OK".
- ▶ On the FPA, go to next month's row and select a template for Boost Kid Essentials 1.0.
- ▶ Forecast module C and save.
- ▶ Update the Med Doc info as needed.
- ▶ Go back out the blue door to the Family Summary Screen.

➤ **Family Summary Screen**

- ▶ Issue benefits and review the Benefits list.
- ▶ View Remove Benefits pop up.

