

eWIC – EBT Household Demographics

Intro

This MOWINS on-demand training module...

Intro1

...is provided by the Missouri Department of Health and Senior Services, Bureau of WIC and Nutrition Services. This module provides an overview of eWIC EBT Household Demographics and EBT Card History.

EBT Household Demographics

Audio

This course contains audio. Please turn on your speakers.

Menu

The EBT Household Demographics screen can be opened in the Participant Folder by expanding the Benefit Management menu.

<no script> Click on the **Benefit Management** menu.

<no script> Select **EBT Household Demographics**.

EBT HH Demo Features

All household and demographic changes are communicated to the EBT processor from the EBT Household Demographics screen.

Let's discuss the features that will not be used by Missouri WIC.

The On Hold feature, in the **Account Status** will not be used by Missouri WIC. The account will always have an active status.

The **Set as Secondary** function will also not be used by Missouri WIC because Missouri will assign only one (1) card per household.

This screen will primarily be used to update representatives, set primary cardholders, and assign cards.

This screen will also allow us to reset a card's PIN and deactivate an account.

Representatives/Proxies

Reps

Let's start with updating household representatives.

If an authorized representative is listed in the EBT Household Representatives list, the **Add Auth Rep** button will be disabled.

If there is not an Authorized Representative listed, the **Add Auth Rep** button is enabled.

As in MOWINS previously, we can have up to three (3) proxies: the authorized representative and two (2) additional alternates.

Let's add another alternate representative.

<no script> Click the **Add Alt Rep/Proxy** button.

The Last Name and First Name are required fields.

Go ahead and enter the Last Name and First Name.

<no script> Type: Bear and click in the first name field.

<no script> Type: Grandma and click the Update button.

Reps1

If we click on a representative's row...

<no script> Click on Grandma Bear's row.

...we have the option to update and delete information for that representative.

Let's update Grandma's relationship to Family Member.

<no script> Click the **Relationship** drop-down.

Select **Family Member**.

<no script> Select **Family Member**.

To save changes, we must click the **Update** button.

<no script> Click the **Update** button.

Notice, at the bottom of the screen the status says, "**EBT update needed**"....

Update

For the new EBT Household Demographic information to be saved in MOWINS and communicated to the EBT Processor we will need to “Send EBT Data.” However, before we send EBT data, a primary cardholder will need to be set.

Set as Primary

Primary

For all households new to eWIC, we will need to set a primary cardholder and assign a card.

The primary cardholder should **always** be one of the authorized representatives or proxies. It is critical that a card is not assigned to a participant with a State WIC ID shown under the State WIC ID column.

Primary1

To set the authorized representative as the primary cardholder, highlight the row by clicking on it.

<no script> Click on the Authorized Representative row.

A primary cardholder must have their date of birth entered.

If we click the update button before entering the date of birth...

A message will display indicating it is a required field.

While we transition households to eWIC, we will often find the authorized representative is already listed.

We will need to ask the primary cardholder for their date of birth.

Remember to click Update to save the date of birth.

<no script> Type in Mommy Bear’s birth date and click the **Update** button.

Primary2

After completing all required fields, click **Set as Primary** button.

<no script> Click the **Set as Primary** button.

Three things happen on the screen: The primary cardholder's name now displays at the top, the Set as Primary button is disabled since the highlighted row has been set as the Primary, and Primary displays in the Card Holder column for the Authorized Representative.

The next step is to assign the card.

Assign Card

Assign Card

First, make sure the primary cardholder row is still highlighted.

A card cannot be assigned to a person who is not the primary cardholder. Let's assign a card to Mommy Bear.

<no script> Click the **Assign Card** button.

We are going to type the card number in.

<no script> Type in the card number: 1234 5691 0000 0595 and click the OK button.

The number now displays in the Card Number column for the Authorized Representative.

The last step is to communicate our primary cardholder and card number to the EBT processor. To do this, click the **Send EBT Data** button.

<no script> Click the **Send EBT Data** button.

<no script> Click the **OK** button or press the Enter key on the keyboard.

No Signature

The final step to assigning a card is to have the primary cardholder sign indicating they have received their eWIC card.

If we are unable to capture the electronic signature, click the Close button to continue.

Capture Signature

Let's collect the primary cardholder's signature.

<no script> Click the **Capture Electronic Signature** button.

<no script> Click the **Save Signature** button.

After saving the signature, the screen automatically closes and brings us back to the main Demographics tab.

Let's take a look at our updated representatives.

<no script> Click the **AdditionalInfo2** tab.

Reset PIN

Reset PIN

We can reset a household's PIN if they've exceeded their seven (7) PIN attempts. Once the PIN attempts have been exceeded, the card will be locked and the PIN will need to be reset at the local agency.

Let's open the EBT Household Demographics screen.

<no script> Click the **Benefit Management** menu.

<no script> Select **EBT Household Demographics**.

In order to enable the Reset PIN button, we must highlight the primary cardholder's row.

<no script> Click the **primary cardholder's row** to highlight it.

And now we can click the Reset PIN button.

<no script> Click the **Reset PIN** button.

Reset PIN1

The following message will appear: "This will Reset PIN on the current card assigned to this participant. Are you sure?"

<no script> select **OK**

The user will now be prompted to change their PIN on the card reader writer device.

After the user has entered their new PIN into the card reader writer device, they will be prompted on the card reader writer device to enter the same PIN a second time.

We can see from the status in the bottom left corner of the screen that the PIN reset was successful.

Deleting/Adding Representatives

Deleting Reps

As a reminder, representatives can now only be deleted in the EBT Household Demographics screen.

Do you think you can delete Grandma Bear and then add Cousin Bear? Go ahead and try.

<no script> Click on **Grandma Bear's row** to highlight it.

<no script> Click the **Delete** button.

<no script> Click the **Yes** button or press the Enter key on the keyboard.

<no script> Click the **Add Alt Rep/Proxy** button.

Adding Reps

<no script> Type: Bear and click in the First Name field

<no script> Type: Cousin and click the Relationship drop-down arrow.

<no script> Select **Family Member**.

<no script> Click the Update button to save any changes to representatives.

Assuming we are done making changes, what's the last step? Go ahead.

<no script > Click the **Send EBT Data** to communicate changes to the EBT Processor and save changes to MOWINS.

<no script > Click OK

Adding Reps1

Let's now verify the change.

<no script> Click the AdditionalInfo2 tab.

Notice Cousin Bear is now listed as the Alternate Representative/Proxy 2.

Go ahead and open the EBT Household Demographics screen again using the button this time.

<no script> Click the **EBT Household Demographics** button.

EBT Household Demographics opens.

Deleting Primary

What happens if we try to delete our primary cardholder?

A message will display informing us that our primary cardholder cannot be deleted. To delete the primary cardholder, we have to assign the card to another household representative or deactivate the card.

<no script> Cursor clicks the OK button.

Changing Primary Card Holders – Authorized Representatives

Primary Card Holder

We will now change the authorized representative by updating the following information; Last Name and First Name, Date of Birth, Relationship, Marital Status, Education Level, and Register to Vote status.

Let's change our primary cardholder to Grandma Bear.

<no script> Click inside the **First Name** field.

<no script> Type Grandma and click inside the **Date of Birth** field.

<no script> Type 10/13/1955 and click on the **Relationship** drop-down.

<no script> Select **Family Member** and click on the Marital Status drop-down.

<no script> Select **Widow**.

<no script> Click on the Education Level drop-down.

<no script> Select **12th Grade OR GED**.

<no script> Click on the Register to vote drop-down.

<no script> Select **Already Registered**.

Whenever we make changes to a representative, remember to click the Update button.

<no script> Click the **Update** button.

Notice the status now reads: EBT update needed. Click the Send EBT Data button.

<no script> Click the **Send EBT Data** button.

<no script> Click the **OK** button or press the Enter key on the keyboard.

Capture Signature

Any time a primary cardholder is changed, the system will require us to capture their electronic signature.

<no script> Click the **Capture Electronic Signature** button.

<no script> Click the **Save Signature** button.

After clicking the save signature button, the screen automatically closes.

Changing Primary Card Holders – Alternate Representatives

Primary Card Holder

As we mentioned before, we can make any of the household representatives a primary cardholder. It is recommended to always keep the authorized representative as the primary cardholder, but there could be rare instances where an alternate representative may need to be the primary cardholder. The system has the flexibility to allow this.

Change Primary

To set another representative as the Primary, highlight their row...

<no script> Click the **Alternate Representative/Proxy 1** row to highlight it.

Don't forget to add the date of birth.

<no script> Type: 10/13/1985 and click the **Update** button.

Change Primary1

Now set Papa as the Primary.

<no script> Click the **Set as Primary** button.

The status indicates we need to Send EBT Data.

<no script> Click the **Send EBT Data** button.

<no script> Click **OK**.

Since we've set a new primary cardholder, we now have to capture their signature.

<no script> Click the **Capture Electronic Signature** button.

<no script> Click the **Save Signature** button.

And again, the EBT Household Demographics screen automatically closes.

Deactivating eWIC cards

Deactivate

The EBT Household Demographics screen also allows us to deactivate a card.

Once we deactivate an eWIC card, it cannot be used again.

Any food benefits on the deactivated card will remain with the household and automatically transfer to the new eWIC card once it's assigned.

To deactivate, we must first highlight the primary cardholder's row, which will enable the deactivate button.

<no script> Click on the **primary cardholder's** row to highlight it.

<no script> Click the **Deactivate Account** button.

Deactivate1

Once deactivated, the Card Number no longer displays in the primary cardholder's row and the status at the bottom left of the screen reads: "The account has been deactivated. Send the change to the EBT system."

If we are not going to replace the card immediately, we must click the **Send EBT Data** button to complete the deactivation.

Write Note

Lastly, write a General Note, documenting the reason why the card was deactivated.

This Note will need to be saved to each household member's folder.

If there is more than one household member...

Write Alert

...we can write an Alert and copy it to a Note.

<no script> Click the **Copy Alert to Note** button.

Select the other household members to save the Alert as a Note for all household members.

Replacing eWIC cards

Replace

Before replacing a card, the current card must be deactivated.

Once a card is replaced, the user will need to set a new PIN for their replacement card.

When replacing a deactivated card, you will first select the **Assign Card** button.

<no script> Click the **Assign Card** button.

We can either insert a new card into the card reader writer device or type in the card's PAN.

<no script> Click **OK** or press the Enter key on the keyboard.

Replace1

The Status now reads: "EBT update needed."

<no script> Click the **Send EBT Data** button.

<no script> Click **OK**.

<no script> Click the **Capture Electronic Signature** button.

<no script> Click the **Save Signature** button.

View EBT Card History

Card Hx

Another function in the Benefit Management menu...

<no script> Click the Benefit Management menu.

...is View EBT Card History.

<no script> Select **View EBT Card History**.

The EBT Card History displays the current primary cardholder, when a card was activated or a replacement was issued, and the electronic signature date.

Card Hx - Stated

“Stated by Authorized Person” indicates that the card was deactivated by WIC staff.

We can tell it was a card deactivation because there is another card number activated after it and...

...there should be a note documenting it.

Card Hx 1

The Primary column indicates that this is the main card and will always be selected since we only issue one card per household.

The **View Signature** button is enabled when we select a Signature row.

<no script> Click the Signature row to highlight it.

<no script> Click the **View Signature** button.

<no script> Click the **Close** button.

Card Hx – Cancel Sig

Let’s take a look at the EBT Card History where the Cancel button was clicked on the Capture Electronic Signature screen.

<no script> Click the **Benefit Management** menu.

<no script> Select **View EBT Card History**

<pause for emphasis>

<no script> Click the **Signature Cancelled by User** row.

<no script> Click the **View Signature** button.

<no script> Click the **Close** button.

<no script> Click the **Close** button.

Question 1

True or False. Within the EBT Household Demographics you can set a Primary and a Secondary Cardholder.

Answer 1

False. Missouri will not be using the “Set as Secondary” function within MOWINS.

Question 2

When you are in the EBT Household Demographics, you must do which of the following before you can assign a card to a household?

Answer 2

F. Before you can assign a card in the EBT Household Demographics, you must first set the primary cardholder and enter in the primary cardholder’s date of birth.

Question 3

Where can we find the eWIC card number in MOWINS?

Answer 3

The eWIC card number can be found in the EBT Card History - View Signature screen and the EBT Household Demographics screen.

Question 4

True or False. The PIN automatically transfers to the replacement card if the original eWIC card is deactivated.

Answer 4

False. When a card has been deactivated and replaced, a new PIN will need to be set for the replacement card.

End

Thank you for viewing this MOWINS on-demand training module presented by the Missouri Department of Health and Senior Services, Bureau of WIC and Nutrition Services.