

# eWIC – Benefit Issuance & View EBT Transaction History

## 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. It provides an overview of the eWIC benefit issuance process and how to view EBT transaction history.

## Issue Benefits

### Audio

This course contains audio. Please turn on your speakers.

### Issue

Issuing eWIC benefits follows all the same rules of issuing paper benefits.

The definitions for Last Date to Use (LDTU), Printed First Date to Use (PFDTU), cycle adjusting, and proration are all the same.

The main difference is that instead of issuing individual paper benefits to each participant in a household, we will be issuing the entire household's food benefits to one card.

### Open Issue Benefits

Issue Benefits is an option...

In the Benefit Management menu...

Or, we can use the Issue Benefits icon. Go ahead and click the icon.

<no script> Click the **Issue Benefits** icon.

### Issue Screen

All of the functions in this screen, including Direct Ship, Edit First Set, and Cycle Adjustment Type work exactly the same as before eWIC.

The **Issue Benefits to Selected Members** function works a little differently.

<no script> Click the **Issue Benefits to Selected Members** button.

## **Aggregated Screen**

The **Aggregated Issuance for EBT Account** screen now opens.

This screen shows all food items that are being placed on the card for all active members of that household. It will display the quantities of each food item issued for each participant and will also show the aggregated household totals.

The category and subcategory numbers display in front of the food descriptions and are used for reporting purposes.

Quantities of zero (0) indicate that the household member is not receiving that particular food item.

We can use the scroll bar to view the rest of the food items being issued to the household.

<no script> Click below the scroll bar to view the rest of the household's food items.

## **Send EBT Data**

At the bottom of this screen...

The **Close** button is always enabled and if we need to change something before issuing, we can close this screen at any time. We can also use the "X" in the top right corner.

The Status "Awaiting Command," on the bottom far left, indicates we need to communicate the issuance to the EBT processor and save the issuance records to MOWINS.

Just like in the EBT Household Demographics screen, we communicate with the eWIC Processor using the Send EBT Data button. Go ahead and click it.

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

The Status reads "Sending EBT Issuance" during communication with the EBT Processor.

The status updates again, once the benefits have been issued. The Status now reads "Issuance Received, Success!"

At the same time, the **Print Shopping List** button becomes enabled and the **Send EBT Data** button is now disabled.

Let's click the **Print Shopping List** button.

<no script> Click the **Print Shopping List** button.

## Print Shopping List

### Report Destination

The Report Destination dialogue box defaults to Display on Screen but we can also send it immediately to the printer or save the file.

Let's click OK.

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

### Shopping List

Since we chose to display the eWIC Shopping List on the screen, the eWIC Shopping List will open in Microsoft Word.

The eWIC Shopping List is only accurate until the household uses their eWIC card to make purchases.

The eWIC Shopping List displays the Household ID, the Primary Cardholder's name, each household member's name, as well as their corresponding State WIC ID.

It lists the Printed First Date to Use and Last Date to Use of each set, along with the food items and the quantities issued to that household member on the eWIC card.

At the bottom are the aggregated household totals.

It also displays the certification end dates for all household members. Notice, there is also a place for agencies to write the participant's next appointment.

### Modify List

Since this is a Word document...

...we can modify, add, or delete information from the document.

<no script> Information was deleted from the bottom of list.

## Shopping List<sup>1</sup>

The eWIC Shopping List template itself is the same for all agencies statewide and cannot be modified.

We should always print the eWIC Shopping List for our eWIC participants.

## Existing Shopping List

If benefits are issued for one member and there are benefits already issued to the card, the eWIC Shopping List will show the new benefits issued to the household member, the existing household benefits, and the new household total.

<no script> Click when ready to continue.

## Print in Word

If we choose Display to Screen, we can use Word to print the Shopping List.

## Print Shopping List

Our other options for the eWIC Shopping List are to “**Send to Printer**” or “**Save File.**” If you would like to immediately print the eWIC Shopping List, we can “**Send to Printer.**”

<no script> Click the **Send to Printer** radio button.

Once we’ve selected the Report Destination and clicked OK...

## Close Aggregated Screen

...we will Close the Aggregated Issuance for EBT Account screen.

Select one of two options to close the screen.

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

<no script> Click the X to close the screen.

# Benefits History & Shopping List

## Open Benefits Hx

Now that we’ve issued some eWIC benefits, let’s take a look at Benefits History.

<no script> Click the **Benefits History** tab.

## Benefits Hx

If we need to reprint the eWIC Shopping List, we can do so in the Benefits History tab.

This section is enabled when we select a row.

<no script> Click on the 06/01/2019-06/30/2019 benefits to highlight the row.

Household is the default and prints the same eWIC Shopping List we saw when printing from the Issue Benefits screen.

Let's print for the participant only.

<no script> Click the **Participant only** radio button.

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

<no script> Select the **Send to Printer** radio button.

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

## Ppt Only

Notice that it doesn't just print the selected set but all sets issued at the same time as the selected set. It still includes the aggregated household totals...

...as well as the same information at the bottom.

## Details

Let's click on the first node to expand it.

<no script> Click on the **plus symbol** in the 06/01/2019 - 06/30/2019 row.

<no script> Click on the **plus symbol** next to the benefit number.

All food items issued are now listed under one benefit number.

Now let's take a look at the **Show Details**.

<no script> Click the **benefit number**.

<no script> Click the **Show Details** button.

All of the same information displays, but did you notice that we didn't collect a signature when we issued the benefits?

We no longer collect a signature when issuing benefits.

We only collect a signature when the card is assigned or when a new primary cardholder is assigned to the card.

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

## Account Balance

### Balance

An option in the Benefit Management menu...

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

Print EBT Account Balance allows us to print a real-time current account balance that reflects redeemed benefits.

<no script> Select **Print EBT Account Balance**.

<no script> Select the **Send to Printer** radio button.

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

The Account Balance is a real-time snapshot of the household's current balance.

<no script> pause for animation.

The balance on an eWIC card can also be obtained by the cardholder from their last receipt or by requesting an authorized WIC retailer to do a balance inquiry.

The eWIC Account Balance has the same information at the bottom as the eWIC Shopping List.

## Transaction History

### Transaction Hx

The Benefit Management menu...

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

...also has an option to view the card's transactions.

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

## Transaction Hx1

The **EBT Transaction History** screen has a couple of different filters.

The time period for our search, where the **End Date** defaults to the current date, is limited to one month or less.

<no script> Type 02/11/2019 and then press the Enter key on the keyboard.

<pause for shape/text>

<no script> Click the **End Date** drop-down.

<no script> Select March 5.

If we select a date so that the time period is less than one month, the other date is maintained.

<no script> Click the **End Date** drop-down.

<no script> Select the **Today** button.

The **Transaction Type** defaults to Both but we can limit it to either Benefit Activity, such as issuance and voids, or Redemption Activity, such as purchases.

To view records, we must click the **Search** button. Let's take a look at all records for the past month.

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

## Transaction Hx2

The **Transaction History** grid provides the Date and Time a transaction occurred, the Transaction Type, and the Benefit Dates that the benefits are active.

The **Transaction Type** includes card activity such as when benefits are issued listed here as "Benefit Add," benefits redeemed, benefits voided, or benefits expired.

We can see more transaction information by selecting a row, which enables the **View Details** button. Let's take a look at the first row.

<no script> Select the first row.

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

## View Details - Issuance

In the top section of the EBT Transaction History Detail screen it repeats the date, time, and transaction type.

It also displays the participant to whom the benefits were issued, the State WIC ID, and the Staff Member who issued the benefits.

The food items issued display in the grid. Go ahead and close this screen.

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

## Transaction Hx3

There are a large number of Benefit Add records because it displays each set of benefits issued to the household members during our specified time period.

Let's see if there are any redemption records by searching for just that type of transaction.

<no script> Click the **Redemption Activity** radio button.

Since we've already performed our search, the current records are simply filtered by selecting the radio button.

Before moving forward, it is important to note that there are two (2) ways to determine if there has been any redemption activity.

The easiest way is to view redemption activity in the EBT Transaction History screen, as displayed now. However, this screen will only update once a retailer has sent their WIC purchases to our EBT processor. If the participant has shopped in the last two (2) business days, this screen may not accurately reflect those redemptions.

The second option is to print the Account Balance and compare the current month's benefit set to the benefits issued in the Benefit History tab for each participant. This option requires users to do a side-by-side comparison and can be time consuming.

<Pause briefly before continuing>

Since there are two (2) Purchase Completion records, we will View Details of each, one at a time.

Let's take a look at the first redemption.

<no script> Select the first row.

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

## View Details – Redemption

We can see that a purchase was made for milk and eggs, and the amount that was redeemed.

### Redemption

Although benefits are now aggregated for the household, the WIC Processor still has to determine which member the redeemed food items belong to.

This is easy if it is something like formula and there is only one (1) infant in the household. But when items like milk and eggs are purchased, where there are multiple members who received them, it is not as straightforward.

### Unique Benefit ID

Each food prescription will receive its own unique benefits ID number assigned to it by the eWIC Processor. When benefits are redeemed, for the month in which they are available, the eWIC Processor will randomly deduct from the aggregated household benefits for that food item category.

Sometimes the benefits will be redeemed from the same ID until the remaining quantity is zero and other times the processor may split the redemptions between two (2) different household members.

### Redemption1

We are not sure how the EBT Processor decides which member is assigned which Unique Benefit ID, or how it decides who to assign the redemption to. However, in this case, it appears that the first food items to be redeemed belonged to Elm.

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

### Transaction Hx4

We can see how the household member for whom the benefits were redeemed changes if we take a look at the redemptions with the same date and time.

<no script> Select the second row.

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

If we remember from the first redemption we looked at, Elm Tree had one (1) dozen eggs and one (1) gallon of milk purchased.

The next redemption is for half a pound of cheese and this time the household member for whom they were redeemed is Dogwood Tree.

## Participant

Although the eggs and milk from the previous redemption row and the cheese from this row were purchased at the same time, the redemption records were split due to random selection by the EBT processor.

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

## Targeted Recovery

We have two more things to look at. First, go ahead and open Purple Rainbow's Transaction History screen.

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

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

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

Targeted Recovery indicates voided benefits and we can see April benefits were voided.

<no script> Click the first **Targeted Recovery** row (April benefits).

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

On the EBT Transaction History Detail screen, we can see the April benefits were voided on March 27<sup>th</sup> and the Staff Member who voided them.

This is the same information we can see in the Benefit Details screen in the Benefits History tab.

## Benefit Expiration

The last transaction type we may commonly see is the Benefit Grant Expiration.

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

This is a system transaction occurring eight (8) days after the participant's Last Date to Use if the benefit set has food items that weren't purchased.

The grid displays the food items and quantities that were left unpurchased.

### **Question 1**

True or False. With eWIC, we can issue benefits using the Issue Benefit icon or through the Benefit Management tab.

### **Answer 1**

True. Benefits can be issued using either the Issue Benefit icon or through the Benefit Management tab.

### **Question 2**

We can reprint an eWIC Shopping List for the Household or Participant in which tab?

### **Answer 2**

B. An eWIC shopping List can be printed in the Benefits History tab.

### **Question 3**

True or False. Within the EBT Transaction History screen, there are three types of transactions.

### **Answer 3**

True. There are three types of transactions within the EBT Transaction History screen. The three types are Benefit Add, Targeted Recovery, and Benefit Grant Expiration.

### **Question 4**

True or False. If the card has been presented, the Account Balance will reflect the household's real-time purchases.

### **Answer 4**

True. The Print EBT Account Balance function allows us to print a real-time current account balance.

### **Question 5**

True or False. The EBT Transaction History screen will only update once a retailer has sent their WIC purchases to our EBT processor.

## **Answer 5**

True. The EBT Transaction History screen will only update once a retailer has sent their WIC purchases to our EBT processor. If the participant has shopped in the last two (2) business days, this screen may not accurately reflect those redemptions.

**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.