SPIRIT WIC System

EBT Clinic Reference Guide

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Version 1.0.0

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Reference Guide

Issuing EBT Benefits - Setting up an EBT Account for a Household

Scenario Set-up: You want to issue benefits to a Household. However, before you can issue benefits, you will need to complete several tasks to prepare the Household for benefit issuance. In an EBT environment, you must record and transmit specific Household information to an independent EBT system before the benefit issuance process can occur. The tasks you will complete are necessary in order for an EBT account to be setup in the EBT system. You will use the **EBT Household Demographics** screen to complete a majority of these tasks.

Once an EBT account is established for a Household, you may simply issue EBT benefits each time thereafter. (For more detail, see the Issuing EBT Benefits – EBT Account Has Already Been Established scenario or press the F1 key to display system help.)

It is recommended that the process explained in this scenario be used on active (already certified) WIC participants only. For WIC applicants (clients needing certified), it is best to start the Certification process first and then complete these tasks using the **EBT Household Demographics** script option from within the **Certification Guided Script**. (For more detail, see the Certifying Applicants and Issuing Benefits scenario or press the F1 key to display system help.)

The process includes the following system tasks:

- Documenting or reviewing the Household's Mailing Address and Telephone 1 information using the **Demographics** screen from within the **Participant Folder**
- Documenting or reviewing the Household's Authorized Representative, Alternate Authorized Representative, and Proxy information using the **Demographics Additional Info 2** screen from within the **Participant Folder**
- Updating the Authorized Representative data and establishing the Primary Card Holder using the **Benefit Management** menu
- Assigning EBT cards to the Household using the **Benefit Management** menu
- Transmitting Household information to the EBT system

NOTE: Once an EBT account is setup for a Household, the account is established in the EBT system. It is not necessary to setup a 'new' account every time you are interested in issuing EBT benefits to a Household.

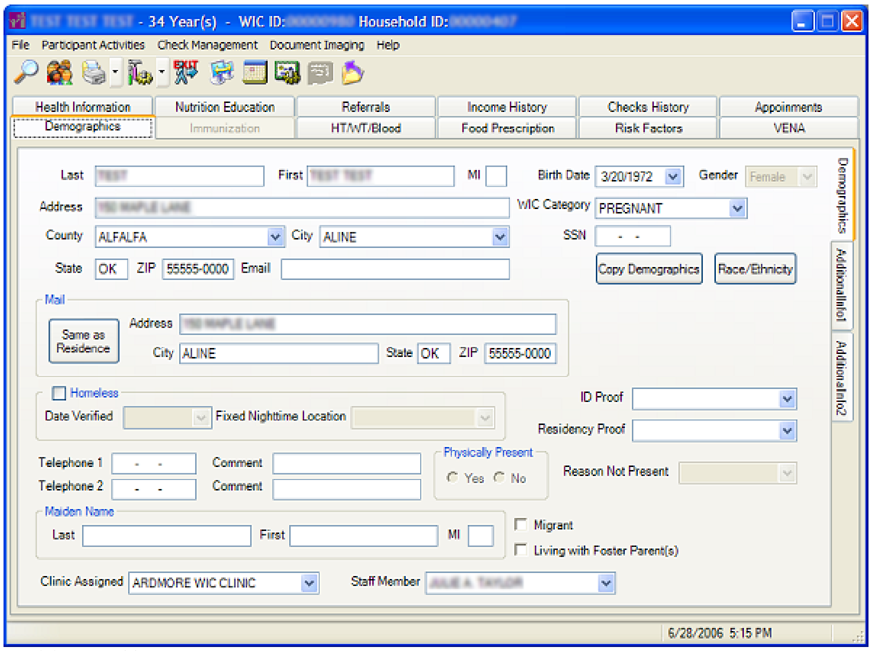
NOTE: Access to the system is managed by local and/or State Office administration. Consult the leadership in your organization if you have questions concerning your level of system access.

NOTE: Press the **F1** key at any time to access help for the current application screen. Each screen's help topic explains the screen's function and describes its content.

Complete the Following Steps to Setup an EBT Account for a Household:

STEP 1: DOCUMENT OR REVIEW THE HOUSEHOLD'S MAILING ADDRESS AND TELEPHONE 1 INFORMATION

a. Search for the client's record and open the client's **Participant Folder**. (For more detail, see the Searching for a Client scenario or press the F1 key to display system help.)



Participant Folder Screen

b. Complete or update the mailing address information for the Household within the **Mail** group box.

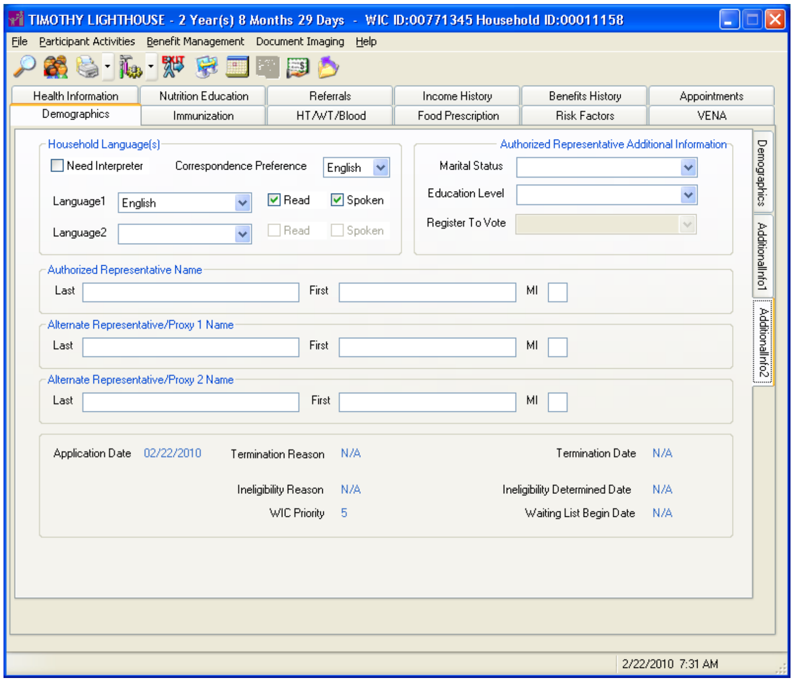
> **NOTE:** The Mailing Address (not the physical address) of the Household will be communicated to the EBT system in a later step. Therefore, it is important to update this information before setting up the EBT account.

c. Complete or update the **Telephone 1** information for the Household.

> **NOTE:** The **Telephone 1** information of the Household will be communicated to the EBT system in a later step. Therefore, it is important to update this information before setting up the EBT account.

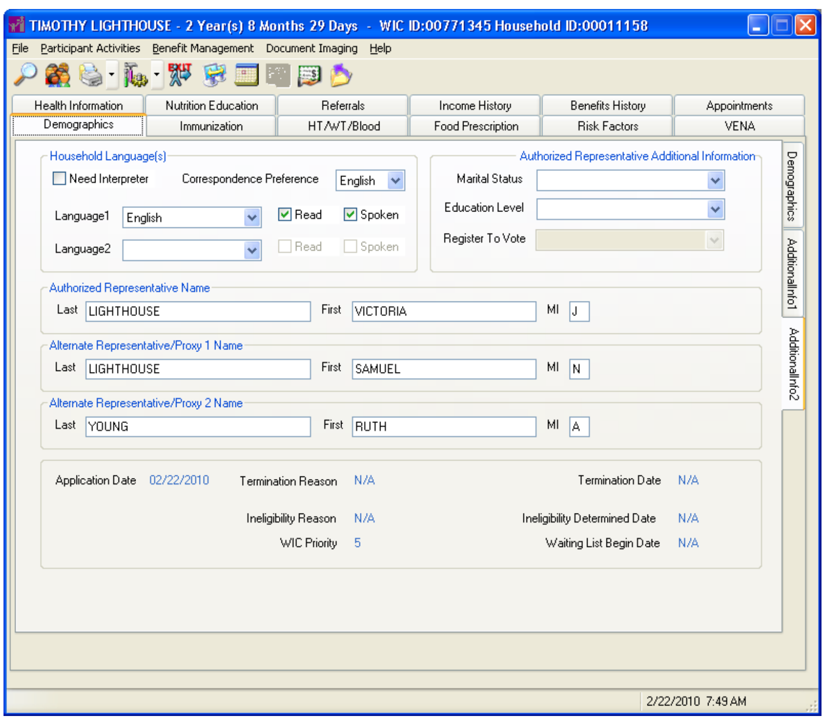
STEP 2: DOCUMENT OR REVIEW THE HOUSEHOLD'S REPRESENTATIVE DATA

a. Select the **Additional Info 2** sub-tab, located on the right side of the **Demographics** tab. The **Additional Info 2** tab displays.



Additional Info 2 Screen

b. Complete or update the **Authorized Representative Name, Alternate Representative/Proxy 1 Name,** and the **Alternate Representative/Proxy 2 Name** group box options.



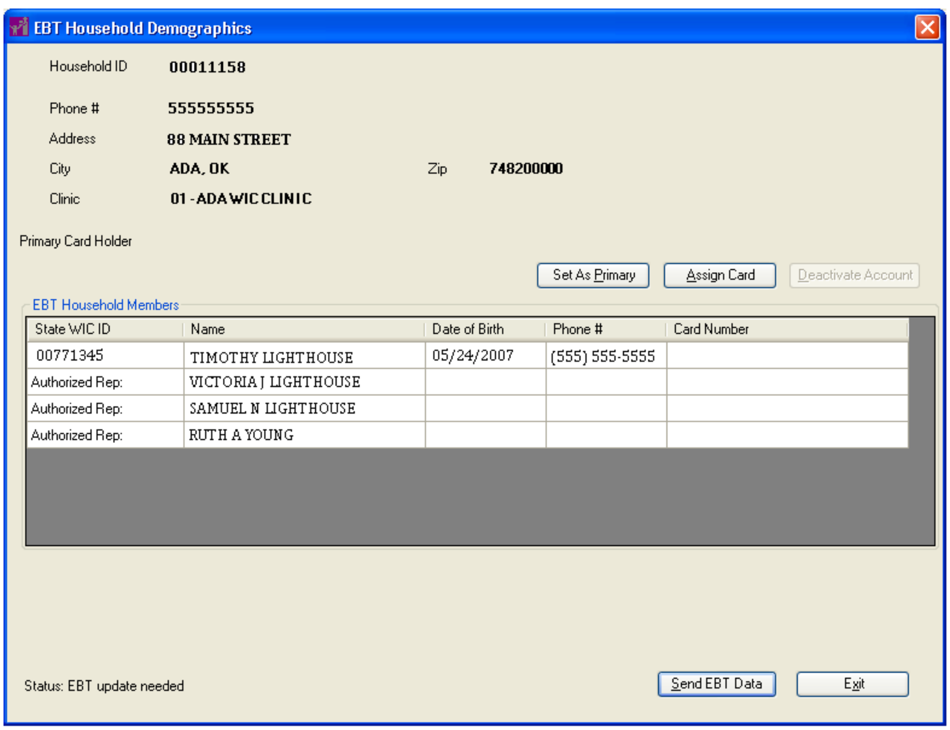
Additional Info 2 Screen

NOTE: The names entered in the **Authorized Representative Name, Alternate Representative/Proxy 1 Name,** and the **Alternate Representative/Proxy 2 Name** group box options will display on the **EBT Household Demographics** screen (which is used to setup the EBT account and to issue EBT cards). However, in cases where the Household has multiple members each listing the same representative data, the system will list each representative's name only once. For example, assume a Household consists of 2 children and you enter the name Sara Gentry as the Authorized Representative Name for both records. The system will display Sara Gentry's name only once on the **EBT Household Demographics** screen. The system compares the first name, last name, and middle initial of all 3 representatives in each member's record and omits displaying duplicate names.

NOTE: Complete STEP 1 and STEP 2 for each member in the selected Household, then proceed to STEP 3.

STEP 3: UPDATE THE AUTHORIZED REPRESENTATIVE DATA AND ESTABLISH THE PRIMARY CARD HOLDER

a. On the **Benefit Management** menu, located on the menu bar at the top of the **Participant Folder**, click **EBT Household Demographics** to setup the EBT account. The **EBT Household Demographics** screen displays.



EBT Household Demographics Screen

NOTE: If you added or updated information on the **Demographics** screen or the **Additional Info 2** sub-tab, the system prompts you to save the information when you select the **EBT Household Demographics** menu option. If you entered new information, click **Yes** to save your changes.

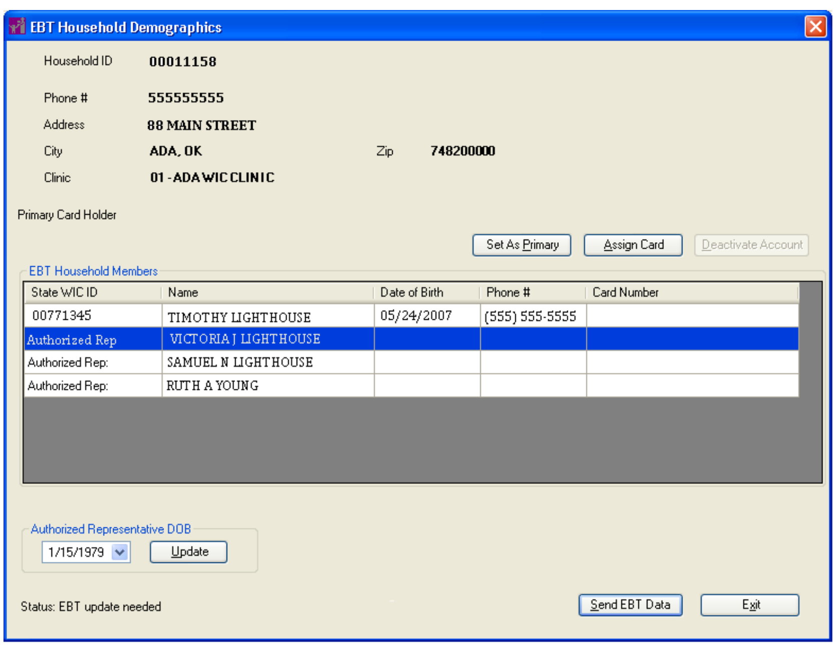
Once **Yes** is clicked, the **EBT Household Demographics** screen displays unless any of the required fields are missing information on the **Demographics** screen**, Additional Info 1** sub-tab, or the **Additional Info 2** sub-tab. In this case, a system message displays prompting you to complete the required fields. Click **OK** to dismiss the system message and then complete the required information. The fields requiring information are outlined in orange. Once you have finished updating the required information, select the **EBT Household Demographics** menu option once more. The system will again prompt you to save any new information. Click **Yes** to save your changes and now the **EBT Household Demographics** screen displays.

NOTE: The Household ID, Telephone 1, Mailing Address, Mailing City, Mailing Zip Code, and Clinic Assigned of the Household displays at the top of the screen.

The **EBT Household Members** table displays the names of all Household members at the top of the grid followed by the information you entered for each Household member's Authorized Representative, Alternate Authorized Representative, and Proxy information. You can distinguish Household members from Authorized Representatives by viewing the information displayed under the **State WIC ID** column. The system displays a State WIC ID number for each Household member whereas it displays **Authorized Rep** for everyone else.

NOTE: The **Status** display in the lower, left-hand corner of the screen indicates **EBT update needed**. You do not need to transmit changes after each, individual change. The task of transmitting changes can be preformed after you have finished making all changes.

b. Select a row in the **EBT Household Member** table listing an Authorized Rep and enter or select their birthday in **Authorized Representative DOB**.



EBT Household Demographics Screen

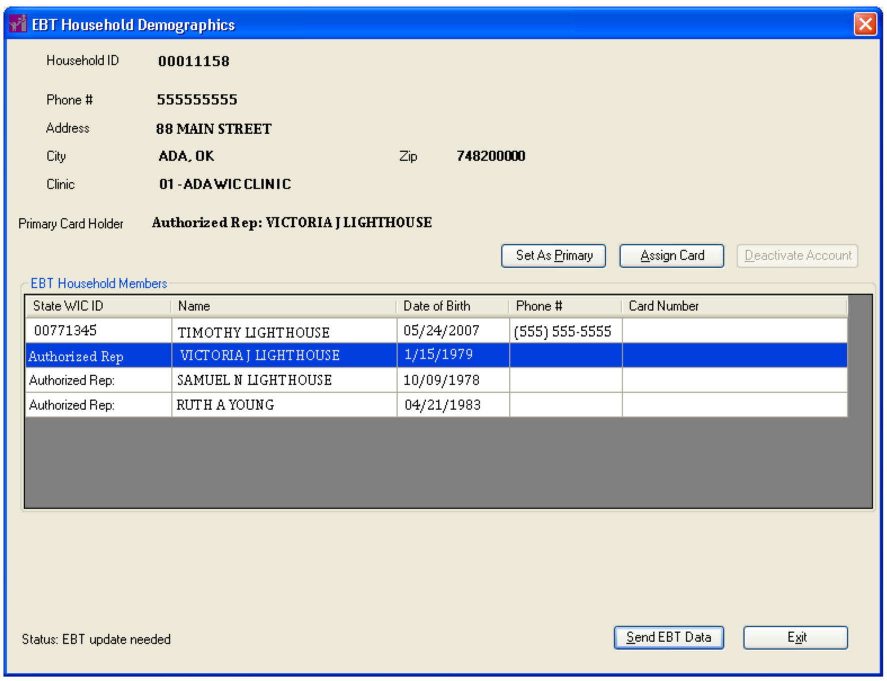
NOTE: The **Authorized Representative DOB** field displays in the bottom, left-hand corner of the **EBT Household Demographics** screen after a row listing an **Authorized Rep** is selected. It is required that a DOB is entered for each Authorized Rep. The system displays each participant's

DOB for you.

c. Click **Update** to update the **EBT Household Members** table. The table is refreshed and displays the newly added information.

NOTE: As necessary, update the **Authorized Representative DOB** for each remaining Authorized Rep listed in the **EBT Household Members** table.

d. Select the row in the **EBT Household Members** table displaying the name of the individual that will serve as the Primary Card Holder and click **Set as Primary**. The **EBT Household Demographics** screen is refreshed and displays the name of the individual you selected to serve as the Primary Card Holder.



EBT Household Demographics Screen

STEP 4: ASSIGN EBT CARD(S) TO THE HOUSEHOLD

a. While still on the **EBT Household Demographics** screen, select a row in the grid and click **Assign Card** to assign an EBT card to the selected individual. The **Assign Card** screen displays.

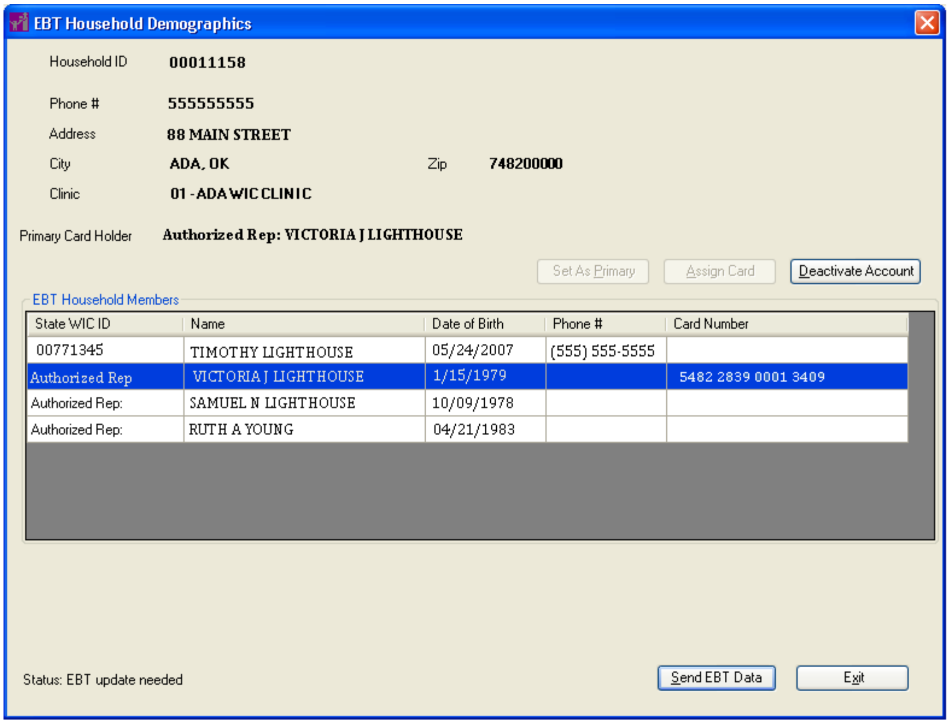
Assign Card Screen

> **NOTE:** A maximum of two (2) EBT cards can be assigned to a Household. You are to assign an EBT card to the individual designated as the **Primary Card Holder** and you can assign 1 additional EBT card to another individual. The order in which the cards are assigned is irrelevant.

b. Swipe an unassigned EBT card through the card reader. The Primary Account Number (**PAN #**) displays in the **Swipe Card or Type PAN** field.

> **NOTE:** The **PAN #** can be entered manually if necessary. All EBT cards for your State will begin with the same eight (8) digits. Therefore, you only need to enter the last eight (8) digits and you can omit any leading zeros (0). For example, if the **PAN #** is 5482 2839 0001 3409, then you only need to enter 13409. You can omit the 3 digits preceding 13409 because they are zeros (0). While manual entry is permitted, it is recommended that you always swipe an EBT card through a card reader to prevent manual entry errors.

c. Click **Save** to assign a card number to the selected individual and return to the **EBT Household Demographics** screen. The screen is refreshed to list the **Card Number** you entered.

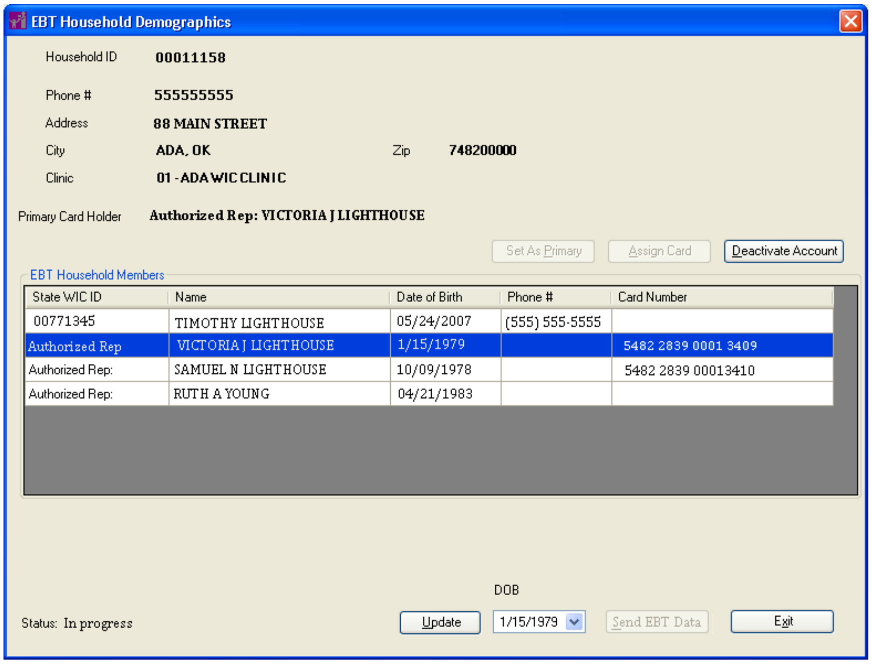


EBT Household Demographics Screen

NOTE: If you have assigned 2 EBT cards to a Household already and attempt to assign another one, the system will automatically deactivate and clear the EBT card not marked as the primary card from the **EBT Household Members** table. The newly assigned card then displays in the **EBT Household Members** table in the row you selected prior to clicking **Assign Card**.

STEP 5: TRANSMIT HOUSEHOLD INFORMATION TO THE EBT SYSTEM

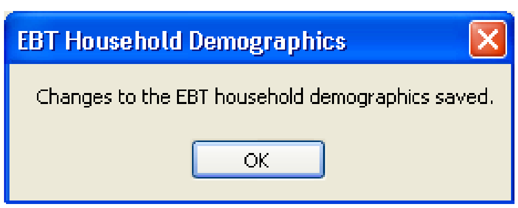
a. Once you have finished updating Authorized Rep information, designated the Primary Card Holder, and assigned EBT cards to the Household, click **Send EBT Data** to transmit information to the EBT system.



EBT Household Demographics Screen

NOTE: The **Send EBT Data** button is disabled after it is clicked and the **Status** display in the lower, left-hand corner of the screen indicates **In progress.**

b. Once the process of updating EBT information is complete, a confirmation screen displays.



EBT Household Demographics Confirmation Screen

NOTE: From this point forward, the system will direct you to the **EBT Household Demographics** screen to transmit updates to the EBT system if any of the following information is updated for the Household:

- Telephone 1 Number
- Mailing Address
- Mailing City/State
- Mailing Zip Code
- Assigned Clinic Location

- Authorized Representative information* (In cases where the Household has multiple members each listing the same representative data, the system must select one member's Authorized Representative data to transmit to the EBT system. Only updates to this member's Authorized Representative information will prompt the system to direct you to the **EBT Household Demographics** screen.)

c. Click **OK** to dismiss the confirmation screen. The **Capture Signature for Card** screen displays. At this time, the only thing left to do is capture the client's signature indicating the receipt of the EBT card(s). The EBT account set up process is complete. Now you may issue EBT benefits to the Household. (For more detail, see the Issuing EBT Benefits – EBT Account Has Already Been Established scenario or press the F1 key to display system help.).

Capture Signature for Card Screen

Issuing EBT Benefits - EBT Account Has Already Been Established

Scenario Set-up: You want to issue benefits to a Household scheduled to pick up on today's date. Assume the Household consists of more than one participant and the Household members scheduled to pick up benefits are active (already certified) participants. Further assume that an EBT account has been established for the Household already.

It is recommended that the process explained in this scenario be used on active (already certified) WIC participants only. For WIC applicants (clients needing certified), it is best to start the Certification process first and then complete these tasks using the **Issue Benefits** script option from within the Certification Guided Script. (For more detail, see the Certifying Applicants and Issuing Benefits scenario or press the F1 key to display system help.)

The process includes the following system tasks:

- Issuing aggregated Household benefits using the **Aggregated Issuance for EBT Account** screen
- Viewing or generating a receipt of items issued using the **Generate EBT Receipt Report** screen

NOTE: Prior to attempting to issue Household benefits, ensure that an EBT account has been setup in the EBT system. (For more detail, see the Issuing EBT Benefits – Setting up the EBT Account for a Household scenario or press the F1 key to display system help.)

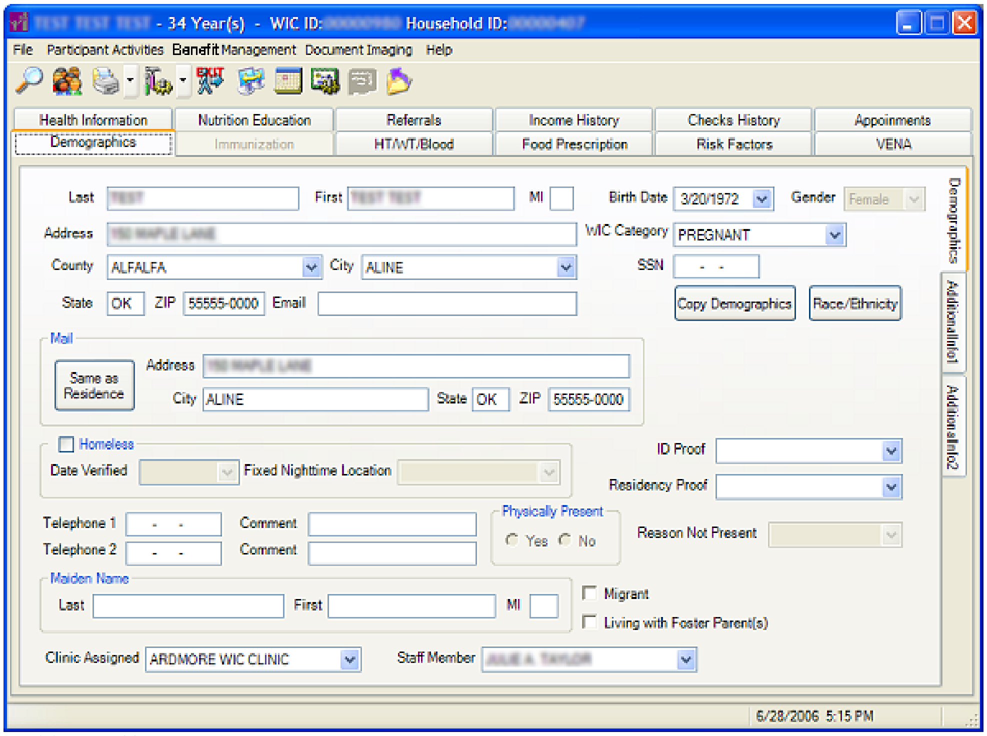
NOTE: Access to the system is managed by local and/or State Office administration. Consult the leadership in your organization if you have questions concerning your level of system access.

NOTE: Press the **F1** key at any time to access help for the current application screen. Each screen's help topic explains the screen's function and describes its content.

Complete the Following Steps to Issue EBT Benefits:

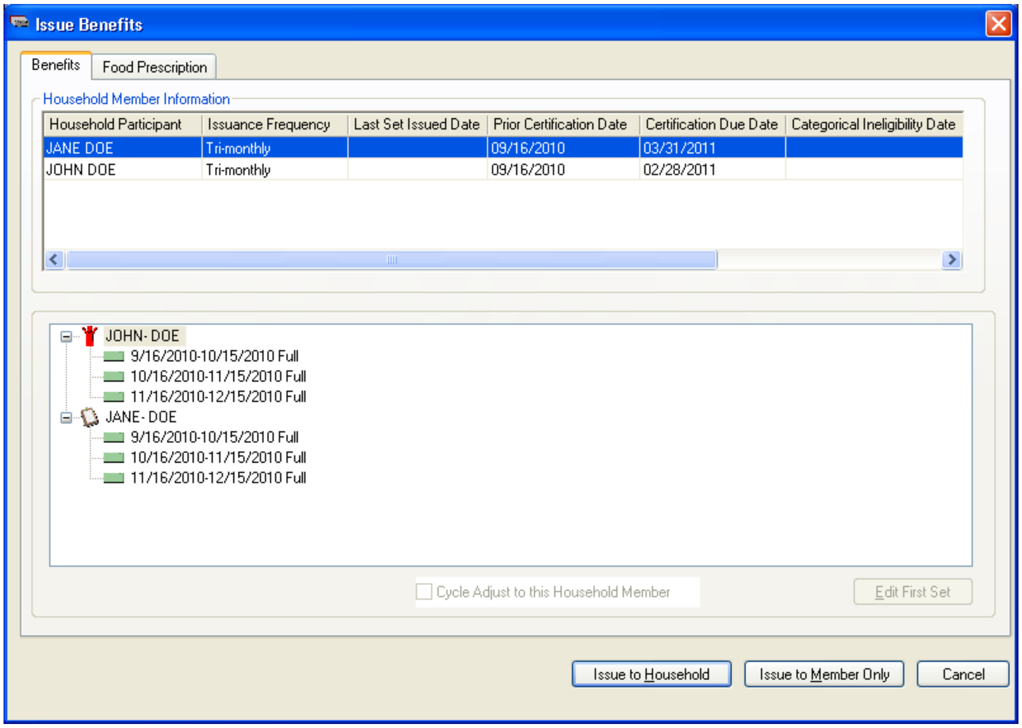
STEP 1: ISSUE AGGREGATED HOUSEHOLD BENEFITS

a. Search for the client's record and open the client's **Participant Folder**. (For more detail, see the Searching for a Client scenario or press the F1 key to display system help.)



Participant Folder Screen

b. On the **Benefit Management** menu, located on the menu bar at the top of the **Participant Folder**, click **Issue Benefits** to issue benefits to the Household. The **Issue Benefits** screen displays with the **Benefits** tab selected. The tree list displays the household members eligible to receive checks.

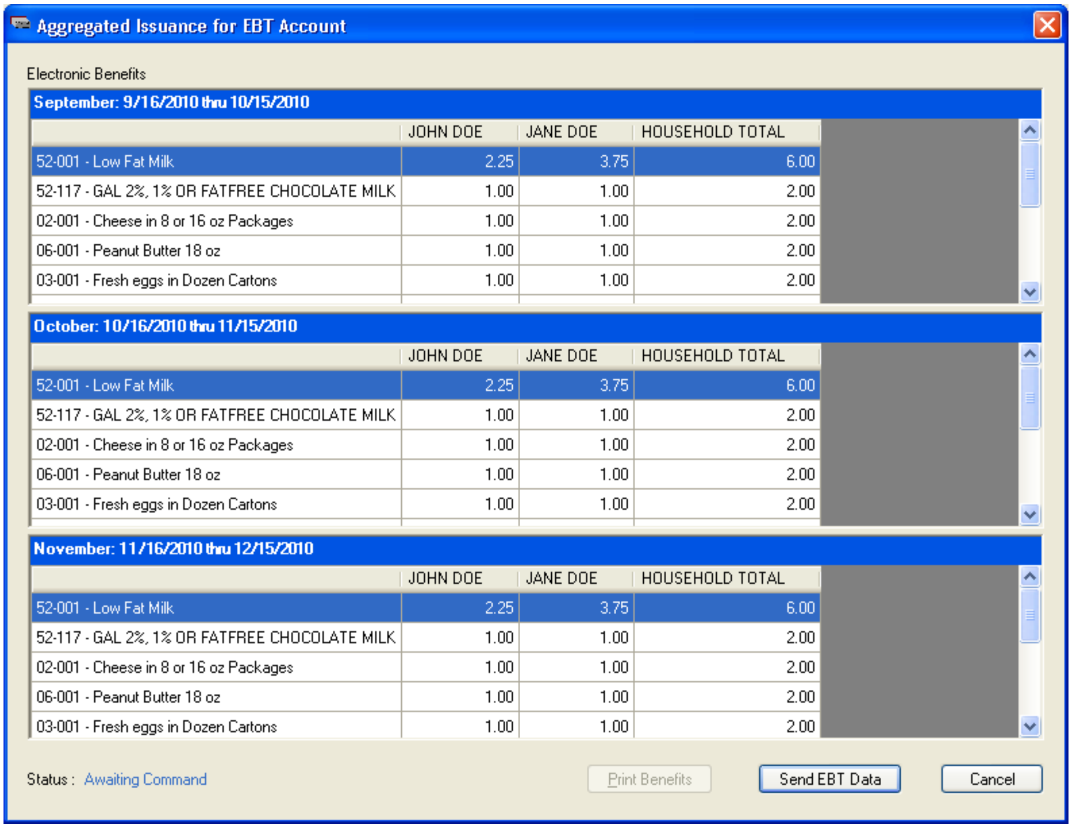


Issue Benefits Screen

NOTE: The opportunity to preview the Household's benefits before they are issued in an EBT environment occurs after the **Issue to Household** or **Issue to Member Only** button is clicked.

NOTE: EBT benefits can be issued to a Household without the currently assigned EBT card(s) being physically present at the time of benefit pickup.

c. Click **Issue to Household** to issue benefits for the Household. The **Aggregated Issuance for EBT Account** screen displays.



Aggregated Issuance for EBT Account

Electronic Benefits

September: 9/16/2010 thru 10/15/2010

	JOHN DOE	JANE DOE	HOUSEHOLD TOTAL
52-001 - Low Fat Milk	2.25	3.75	6.00
52-117 - GAL 2%, 1% OR FATFREE CHOCOLATE MILK	1.00	1.00	2.00
02-001 - Cheese in 8 or 16 oz Packages	1.00	1.00	2.00
06-001 - Peanut Butter 18 oz	1.00	1.00	2.00
03-001 - Fresh eggs in Dozen Cartons	1.00	1.00	2.00

October: 10/16/2010 thru 11/15/2010

	JOHN DOE	JANE DOE	HOUSEHOLD TOTAL
52-001 - Low Fat Milk	2.25	3.75	6.00
52-117 - GAL 2%, 1% OR FATFREE CHOCOLATE MILK	1.00	1.00	2.00
02-001 - Cheese in 8 or 16 oz Packages	1.00	1.00	2.00
06-001 - Peanut Butter 18 oz	1.00	1.00	2.00
03-001 - Fresh eggs in Dozen Cartons	1.00	1.00	2.00

November: 11/16/2010 thru 12/15/2010

	JOHN DOE	JANE DOE	HOUSEHOLD TOTAL
52-001 - Low Fat Milk	2.25	3.75	6.00
52-117 - GAL 2%, 1% OR FATFREE CHOCOLATE MILK	1.00	1.00	2.00
02-001 - Cheese in 8 or 16 oz Packages	1.00	1.00	2.00
06-001 - Peanut Butter 18 oz	1.00	1.00	2.00
03-001 - Fresh eggs in Dozen Cartons	1.00	1.00	2.00

Status : Awaiting Command

Print Benefits | Send EBT Data | Cancel

Aggregated Issuance for EBT Account Screen

NOTE: Under **Household TOTAL**, food items for the entire Household are aggregated (or totaled) by category and sub-category and displayed by benefit period. For example, assume 2 members of a Household are issued the same type of milk. One member receives 2.25 gallons of milk and the other member receives 3.75 gallons of milk. In this case, 6 gallons of milk (2.25+3.75=6) displays for each benefit period.

NOTE: Use the scroll bar, located to the right of each benefit period, to view a complete list of food items issued to the Household.

NOTE: The **Print Benefits** button is disabled (or turned off) until **Send EBT Data** is clicked. After **Send EBT Data** is clicked, the **Print Benefits** button is enabled (or turned on).

d. Click **Send EBT Data** to issue Household benefits. You are returned to the **Aggregated Issuance for EBT Account** screen and the **Status** label is updated.

NOTE: The system transmits EBT issuance data and updates the EBT system. The Status label indicates, "Issuance Received, Success!" when the transmission of issuance data is successful.

NOTE: Once the EBT data is sent and the EBT system is updated, the **Print Benefits** button is enabled (or turned on).

STEP 2: VIEW OR GENERATE A RECEIPT OF FOOD ITEMS ISSUED TO THE HOUSEHOLD

a. Click **Print Benefits** to view or generate a receipt of food items issued to the Household. The **Generate EBT Receipt Report** screen displays.

b. Select one of the following **Report Destination** options to specify the destination of the generated receipt and then click **OK**:

- **Display on Screen** – Click this option to display the receipt on the computer's monitor after the receipt is generated.
- **Send to Printer** – Click this option to send the receipt to the selected output printer.
- **Save as PDF** – Click this option to save the receipt as a PDF file after it is generated.

> **NOTE:** If you selected:
>
> - **Display on Screen**: Click **Close** after you are finished viewing the receipt information. You are then returned to the **Aggregated Issuance for EBT Account** screen.
> - **Send to Printer**: A receipt of food items issued to the Household is sent to the selected printer and you are returned to **Aggregated Issuance for EBT Account** screen. If you have not set your default printers prior to clicking **OK**, the **Set Default Printers** screen displays prompting you to set default printers. Select a printer for each option and then click **OK**. Now, a receipt is sent to the selected printer and you are returned to **Aggregated Issuance for EBT Account** screen.
> - **Save as PDF**: Browse to the desired location and click **Save**. A copy of the receipt is saved to the selected location and you are then returned to the **Aggregated Issuance for EBT Account** screen.

c. Click **Close** to dismiss the **Aggregated Issuance for EBT Account** screen. You are returned to the Participant Folder of the selected participant. You may continue working with the participant as necessary.

Certifying Applicants and Issuing Benefits

Scenario Set-up: You are interested in certifying more than one member of a Household and in issuing their benefits at the end of the certification process. You will complete the **Certification Guided Script** process (consisting of many screens) for each applicant to accomplish this task.

In this scenario, assume that the Household you are working with consists of a pregnant woman and a child. As for completing the **Certification Guided Script** process, the same results can be achieved by beginning the process on either applicant first. Be aware that for reasons unrelated to the design of the system, your organization may require you to work with certain records first (i.e. – always begin with the youngest or oldest member record first). However, for this scenario, assume that you will work with the woman's record first, followed by the child's record.

Lastly, while this scenario covers the process of working with a Household consisting of a pregnant woman and her child specifically, the general process and concepts explained in this scenario still apply to completing Certifications consisting of other Household member combinations.

The process includes the following tasks:

- Certifying the woman for participation in the WIC program including managing EBT Household Demographic Information (Steps 1-13)
- Certifying the child for participation in the WIC program including managing EBT Household Demographic Information (Steps 14-30)
- Capturing an electronic signature to confirm the clients' receipt of one or more EBT cards
- Issuing benefits for each client
- Capturing an electronic signature to confirm the clients' receipt of the Rights and Responsibilities Statement

NOTE: Access to the system is managed by local and/or State Office administration. Consult the leadership in your organization if you have questions concerning your level of system access.

NOTE: Press the **F1** key at any time to access help for the current application screen. Each screen's help topic explains the screen's function and describes its content.

Complete the Following Steps to Certify an Applicant and Her Child:

STEP 1: BEGIN THE CERTIFICATION ATTEMPT FOR THE WOMAN

a. Search for the woman's record and open the woman's **Participant Folder**. (For more detail, see the Searching for a Client scenario or press the F1 key to display system help.)

NOTE: It is recommended that you conduct your search using the Household ID number. When searching by Household ID, the system displays all member records sharing the same Household ID number. Unlike searching by first and last names (which may or may not display all Household members)or searching by State WIC ID which displays only one member record, Household ID searches enable you to locate and work with all Household member records without conducting additional searches to locate other family members.

NOTE: If a record does not exist for each WIC applicant already, create a record for each client before beginning this process (For more detail, see the Prescreening an Applicant and Scheduling an Initial Appointment scenario or press the F1 key to display system help.)

b. Click the **Certification** toolbar button (pictured below). A confirmation screen displays.

c. Click **Yes**. The **Certification Guided Script** screen displays.

NOTE: If the woman's record was Prescreened (or created) prior to today's date, the **Certification WIC Category** screen displays prompting you to select the woman's Category again before the **Certification Guided Script** screen displays due to the possibility that her Category may have changed since the record was created. Select her Category and click **Yes** to begin the Certification process. Now, the **Certification Guided Script** screen displays.

NOTE: The **Certification Guided Script** screen displays a number of script options for you to choose, each one allowing you to record client information appropriate for the option's title. In this scenario, you will complete the script options in the order displayed on the screen without regard to any specific organizational role (i.e. – Intake specialist, CPA, Nutritionist, etc). Once you are familiar with the Certification process, you may complete the script options in any order you choose; however, benefits cannot be issued before a food prescription has been created and a food prescription cannot be created until risk factors have been assigned.

STEP 2: COMPLETE THE DEMOGRAPHICS SCRIPT OPTION FOR THE WOMAN

a. Click the **Demographics** script option. The **Demographic Information** screen displays with the **Demographic**s tab selected.

NOTE: The **Demographic Information** screen is used to gather and store demographic information such as the individual's name, residential address, mailing address, birth date, gender, and so on. Take a close look at the screen, and read through the information available there. You may have noticed already, but the majority of the information displayed on the screen is the same information gathered during the Prescreening process or during a previous Certification attempt. Note the three demographics tabs displayed along the right edge of the screen. Clicking a tab displays the tabbed page of the same name. They are **Demographics, Additional Info 1,** and **Additional Info 2**. All three tabbed pages store demographic information that must be entered before the Certification can be completed.

NOTE: For training purposes, do not use the following to record the current client's information during this scenario:

- **Copy Demographics**
- **Homeless**
- **Migrant**
- **Living with Foster Parents**

Selecting the **Migrant** or **Homeless** check box prompts the system to assign the associated risk factor to the client. Outside of training, you can select either check box as necessary. System assigned risk factors are displayed in the **Certification Risk Factors** table. Click the **Risk Factors** script option to view the table and all assigned risk factors.

b. Begin recording information on the **Demographics** screen, stopping when you reach the **Race/Ethnicity** button.

c. Click **Race/Ethnicity**. The **Race/Ethnicity** screen displays.

d. Complete the **Race/Ethnicity** screen.

NOTE: If the client claims an **American Indian** or **Alaskan Native** heritage, select the **Tribe** to which the client belongs.

e. Click **OK**.

f. Click the **Income Calculator** button (pictured below). The **Income Calculator** screen displays.

g. Under **Adjunctive Eligibility**, select one or more check boxes, and then select a proof of participation for each check box selected. in its list.

h. Click **Add Item** to document income information. The **Add Income Line Item** screen displays.

i. Select a **Payment Frequency** based on the applicant's income information and complete the associated information.

j. Select the applicants **Proof of Income** for the income information she provided.

k. Click **OK**.

l. Under **Current Income Information**, enter the number of members in the client's household in **Household Size**.

m. Click **OK**.

NOTE: For training purposes, select **Yes** under **Physically Present**.

n. Complete the **Demographics** screen, gathering as much information as possible.

o. Click the **Additional Info 1** tab. The **Additional Info 1** screen displays.

NOTE: For training purposes, select **No** in the **Household Smoking** list.

p. Complete the **Additional Info 1** screen, gathering as much information as possible.

NOTE: **Type of Medical Home** is the type of facility at which the client receives her health care; whereas, **Medical Home** is the primary facility at which the client receives her health care.

q. Click the **Additional Info 2** tab. The **Additional Info 2** screen displays.

r. Complete the **Additional Info 2 screen**, gathering as much information as possible.

s. Click **OK**.

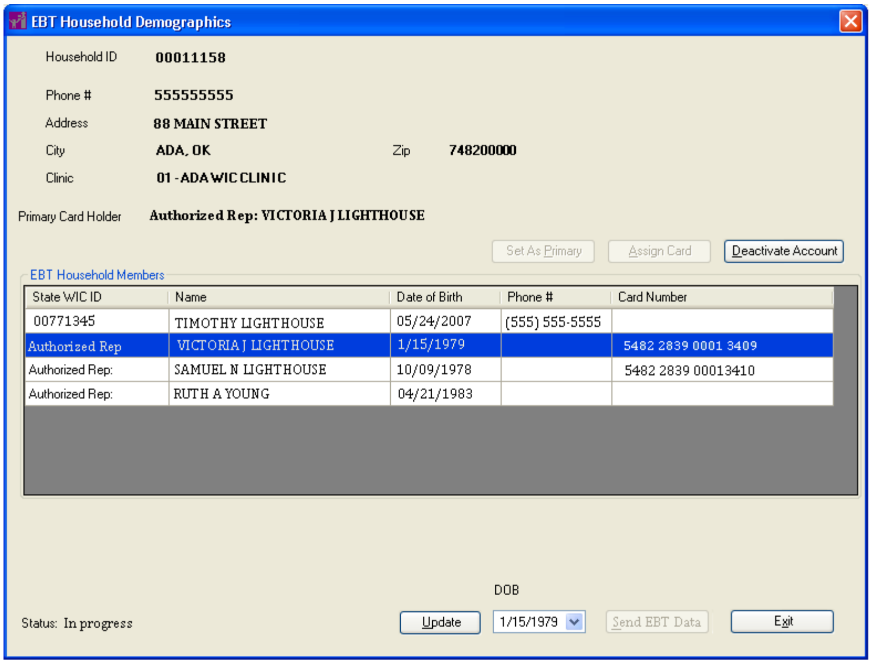
NOTE: Upon returning to the **Certification Guided Script** screen, you will see a check mark displayed next to the **Demographics** script option. The check mark serves as a visual cue enabling you to identify the options you have accessed. However, it does not indicate that any information has been completed for the option. Later, you will review the certification attempt for errors, and the **Event Log** displays any information that is missing or invalid.

STEP 3: COMPLETE THE EBT HOUSEHOLD DEMOGRAPHICS SCRIPT OPTION FOR THE WOMAN

a. Click the **EBT Household Demographics** script option. The **EBT Household Demographics** screen displays.

b. Complete the **EBT Household Demographics** screen, gathering as much information as possible. (For more detail, see the Issuing EBT Benefits - Setting up an EBT Account for a Household scenario or press the F1 key to display system help.)

c. Once you have finished updating Authorized Rep information, designated the Primary Card Holder, and assigned EBT cards to the Household, click **Send EBT Data** to transmit and update the information in the EBT system.



EBT Household Demographics Screen

NOTE: The **Send EBT Data** button is disabled after it is clicked and the **Status** display in the lower, left-hand corner of the screen indicates **In progress.**

d. Once the task of updating EBT information is complete, the **Capture Signature for Card** screen displays. Click **Capture Signature** and direct the applicant to sign for the receipt of the EBT card(s).

Capture Signature for Card Screen

e. Once the applicant has signed for the EBT cards, click **Save Signature**.

STEP 4: COMPLETE THE HEALTH INFORMATION SCRIPT OPTION FOR THE WOMAN

a. Click the **Health Information** script option. The **Woman Health Information** screen displays with the **Pregnancy** tab selected.

b. Complete the **Pregnancy Information** screen, gathering as much information as possible.

c. Click **OK**.

STEP 5: COMPLETE THE HEIGHT, WEIGHT AND BLOOD SCRIPT OPTION FOR THE WOMAN

a. Click the **Height, Weight and Blood** script option. The **Height, Weight, and Blood Work Information** screen displays with the **Height/Weight** tab selected.

b. Click **Add**. The **Height/Weight Measurement** screen displays.

c. Complete the **Height/Weight Measurement** screen, gathering as much information as possible.

d. Click **OK**.

e. Click the **Blood** tab. The **Blood Work Information** screen displays.

f. Click **Add**. The **Blood Measurement** screen displays.

g. Complete the **Blood Measurement** screen, gathering as much information as possible.

h. Click **OK**.

i. Click **Close**.

STEP 6: COMPLETE THE VENA SCRIPT OPTION FOR THE WOMAN

a. Click the **VENA** script option. The **VENA** screen displays.

b. Click **Add Contact**. The **VENA Contact** screen displays.

The **VENA Contact** screen displays a **Question** for you to ask the applicant and a box in which to enter the applicant's **Answer**. In addition, you have the ability to assign risk factors based on the answers that the applicant gives. After you've asked the question, entered the answer, and assigned any necessary risk factors, you will click **Next** to display the next question. The number of questions for which you're required to collect answers is displayed in the title bar at top of the screen. When you've completed the last of the questions, you'll click **Finish** to complete the VENA contact.

c. Enter the applicant's answer to the displayed **Question** in the box under **Answer**.

> **NOTE:** If the applicant's **Answer** requires the assignment of a risk factor, click **Add** under **Risk Factors**, select all applicable risk factors in the list displayed on the **Select Risk Factors** screen, and then click **OK**.

d. Click **Next**.

> **NOTE:** You can click **Previous** to return to a prior question at any time.

e. Repeat the two previous steps until you have answered all of the VENA contact questions.

f. Click **Finish**.

The **VENA Contacts** tree list is refreshed to display the newly added contact information. VENA contacts display in reverse chronological order. So, the most recent contact displays at the top of the list. Risk factors assigned during the selected VENA contact display in the **Risk Factors Assigned from this VENA Contact** list box.

g. Click **Close**.

STEP 7: COMPLETE THE RISK FACTORS SCRIPT OPTION FOR THE WOMAN

a. Click the **Risk Factors** script option. The **Certification Risk Factors** screen displays.

b. Select a risk factor in the **Available** list.

c. Click the **Select** button (pictured below) to move a risk factor highlighted in the **Available** list to the **Selected** list.

d. Repeat the two previous steps, as necessary, until all applicable risk factors have been moved to the **Selected** list.

e. Click **OK**.

> **NOTE:** Notice that selected risk factors are displayed in the **Risk Factors** table under **Household Member Information**. The **Risk Factors** table displays both CPA and system defined risk factors.

STEP 8: COMPLETE THE REFERRALS/OTHER PROGRAMS SCRIPT OPTION FOR THE WOMAN

a. Click the **Referrals/Other Programs** script option. The **Referrals and Other Programs** screen displays.

b. Select a program in the **Available** list.

c. Click the **Select** button to move a program highlighted in the **Available** list to the **Selected** list.

d. Repeat the two previous steps, as necessary, until all applicable programs have been moved to the **Selected** list.

e. Click **Add**. The **Add Referral Contact Information** screen displays.

f. Enter or select the date of the referral in **Date of Referral(s)**.

g. Select a program or organization in the **Available** tree list.

h. Click the **Select** button (pictured below) move a program or organization highlighted in the **Available** tree list to the **Selected** tree list.

i. Repeat the two previous steps, as necessary, until all applicable programs and organizations have been moved to the **Selected** tree list.

j. Click **OK**.

k. Click **OK**.

STEP 9: COMPLETE THE NUTRITION EDUCATION SCRIPT OPTION FOR THE WOMAN

a. Click the **Nutrition Education** script option. The **Nutrition Education Contacts** screen displays.

b. Click **Add Individual Contact**. The **Individual Nutrition Education Contact** screen displays.

NOTE: The required topics of discussion are pre-selected.

c. Select additional topics to be discussed in the **Topics Discussed** list.

d. Click **OK**.

e. Click **Close**.

STEP 10: COMPLETE THE FOOD PRESCRIPTION SCRIPT OPTION FOR THE WOMAN

a. Click the **Food Prescription** script option. The **Food Prescriptions** screen displays.

b. View the system-built food prescription in the **Food Prescriptions** tree list.

NOTE: During the **Certification Guided Script** process, the system automatically suggests a food prescription for the based on the Age, Category, risk factors, and feeding status of the applicant.

NOTE: Select a food prescription date in the tree list and then click **Edit** to tailor a food prescription.

c. Click **Close**.

STEP 11: COMPLETE THE CPA-DETERMINED FOLLOW-UP SCRIPT OPTION FOR THE WOMAN

a. Click the **CPA-determined Follow-up** script option. The **CPA-determined Follow-up** screen displays.

b. Complete the **CPA-determined Follow-up** screen, making a selection in every list.

c. Click **OK**.

STEP 12: COMPLETE THE SOAP NOTE SCRIPT OPTION FOR THE WOMAN

a. Click the **SOAP Note** script option. The **Create SOAP Note** screen displays.

b. Enter the **SOAP Note Text**, entering complete information in the Subjective, Objective, Assessment, and Plan sections.

c. Click **OK**.

NOTE: Once you have finished the Create SOAP Note screen, do not click or complete the **Issue Benefits** script option at this time. Clicking the **Issue Benefits** script option prompts the system to check the Certification attempt for errors and completes the Certification attempt. You will then be directed to the **Issue Benefits** screen, so that you can issue benefits to the participant. However, at this point, you have not completed the child's Certification and the child is not yet eligible to receive benefits. You will click the **Issue Benefits** option at the end of the child's Certification.

STEP 13: CHECK FOR ERRORS AND COMPLETE THE CERTIFICATION ATTEMPT FOR THE WOMAN

a. Click the **End Certification Process** toolbar button (pictured below) to check the Certification for errors and to complete the certification process (without issuing benefits). A message displays verifying the certification is complete.

NOTE: If errors are found, the **Event Log** screen displays. Correct any errors listed, and then repeat the previous step.

NOTE: The **End Certification Process** toolbar button is similar to the **Issue Benefits** script option in that both methods check the Certification attempt for errors and both methods complete the Certification attempt. However, unlike the **Issue Benefits** script option, the **End Certification Process** toolbar button does not direct you to the **Issue Benefits** screen.

It is recommended that you click the **End Certification Process** toolbar button for each applicant of a Household you are certifying except when you are ready to complete the Certification attempt for the last member of each Household. For the last Household member being certified, click the **Issue Benefits** script option instead. This way, each Household member you certified will be listed on the **Issue Benefits** screen and eligible to receive benefits.

b. Click **OK**. The **Applicant is Certified** screen displays.

c. Clear the **Schedule Appointment** check box.

NOTE: Leaving the **Schedule Appointment** check box marked prompts the system to display the **Schedule Appointments** screen. While you may intend to schedule a follow-up appointment, you will have another opportunity to do so at the end of the child's Certification attempt.

d. Click **OK**. The **Work with Another Household Member** screen displays.

STEP 14: BEGIN THE CERTIFICATION ATTEMPT FOR THE CHILD

a. Select the child's record in the **Household Members** table.

b. Click **OK**. A confirmation message displays.

c. Click **Yes**. The **Certification Guided Script** screen displays for the child's record.

> **NOTE:** Once you confirm your intent to work with the child's record, the system closes the woman's record, opens the child's record, and displays the **Certification Guided Script** screen for the child automatically. This process may take a few seconds to occur.
>
> You can verify that the child's record is open by reviewing your task bar, typically located at the bottom of the monitor, near the Start button. You will notice the child's name listed instead of the woman's name. This indicates that the system closed the woman's record and opened the child's record.

STEP 15: COMPLETE THE DEMOGRAPHICS SCRIPT OPTION FOR THE CHILD

a. Click the **Demographics** script option. The **Demographic Information** screen displays with the **Demographics** tab selected.

b. Click **Copy Demographics**. The **Copy Demographics from Another Household Member** screen displays.

c. Select the woman's record in the **Household Members** table.

d. Select the **Replace Existing Information** check box.

e. Click **OK**. The household information displayed on the **Demographics** screen is refreshed to display the household information copied from the woman's record.

f. Click **Race/Ethnicity**. The **Race/Ethnicity** screen displays.

g. Complete the **Race/Ethnicity** screen.

> **NOTE:** If the client claims an **American Indian** or **Alaskan Native** heritage, select the **Tribe** to which the client belongs.

h. Click **OK**.

i. Click the **Income Calculator** button (pictured below). The **Income Calculator** screen displays.

j. Under **Adjunctive Eligibility**, select one or more check boxes, and then select a proof of participation for each check box selected, if applicable.

> **NOTE:** If income was entered for the woman, the system copies and displays the amount entered in the child's record. You do not need to re-enter this information unless you need to correct or add to the amount entered.

k. Under **Current Income Information**, enter the number of members in the client's household in **Household Size**.

l. Click **OK**.

m. Complete the **Demographics** screen, gathering as much information as possible.

n. Click the **Additional Info 1** tab. The **Additional Info 1** screen displays.

o. Complete the **Additional Info 1** screen, gathering as much information as possible.

NOTE: Type of Medical Home is the type of facility at which the client receives her health care; whereas, **Medical Home** is the primary facility at which the client receives her health care.

p. Click the **Additional Info 2** tab. The **Additional Info 2** screen displays.

q. Complete the **Additional Info 2** screen, gathering as much information as possible.

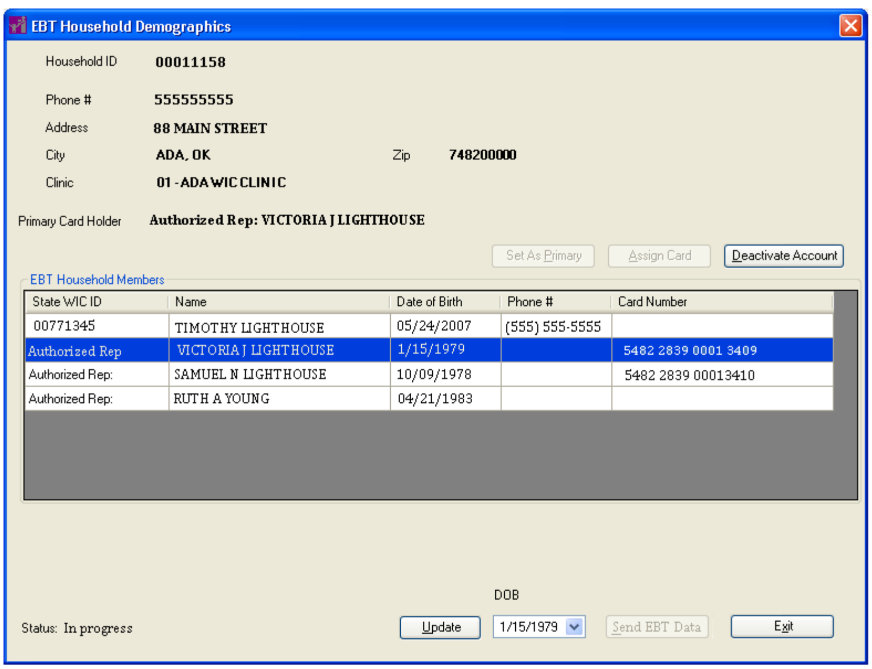
r. Click **OK**.

STEP 16: COMPLETE THE EBT HOUSEHOLD DEMOGRAPHICS SCRIPT OPTION FOR THE CHILD

a. Click the **EBT Household Demographics** script option. The **EBT Household Demographics** screen displays.

b. Complete the **EBT Household Demographics** screen, gathering as much information as possible. (For more detail, see the Issuing EBT Benefits - Setting up an EBT Account for a Household scenario or press the F1 key to display system help.)

c. Once you have finished updating Authorized Rep information, designated the Primary Card Holder, and assigned EBT cards to the Household, click **Send EBT Data** to transmit and update the information in the EBT system.



EBT Household Demographics Screen

NOTE: The **Send EBT Data** button is disabled after it is clicked and the **Status** display in the lower, left-hand corner of the screen indicates **In progress.**

d. Once the task of updating EBT information is complete, the **Capture Signature for Card** screen displays. Click **Capture Signature** and direct the applicant to sign for the receipt of the EBT card(s).

Capture Electronic Signature for Card Screen

e. Once the applicant has signed for the EBT cards, click **Save Signature**

STEP 17: COMPLETE THE HEALTH INFORMATION SCRIPT OPTION FOR THE CHILD

a. Click the **Health Information** script option. The **Child Health Information** screen displays.

b. Begin recording information on the **Child Health Information** screen, stopping when you reach the **Mother's Information**.

c. Enter the mother's **Birth Date**.

d. Select the **On WIC** check box.

e. Click the **Linked Participant** button (pictured below). The **Linked Participant** screen displays.

f. Select the mother's record in the **Linked Participant** table.

g. Click **OK**. The information displayed under **State WIC Information** on the **Child Health Information** screen is refreshed to display the information recorded for the mother.

h. Complete the **Child Health Information** screen, gathering as much information as possible.

i. Click **OK**.

STEP 18: COMPLETE THE HEIGHT, WEIGHT AND BLOOD SCRIPT OPTION FOR THE CHILD

a. Click the **Height, Weight and Blood** script option. The **Height, Weight, and Blood Work Information** screen displays with the **Height/Weight** tab selected.

b. Click **Add**. The **Height/Weight Measurement** screen displays.

c. Complete the **Height/Weight Measurement** screen, gathering as much information as possible.

d. Click **OK**.

e. Click the **Blood** tab. The **Blood Work Information** screen displays.

f. Click **Add**. The **Blood Measurement** screen displays.

g. Complete the **Blood Measurement** screen, gathering as much information as possible.

h. Click **OK**.

i. Click **Close**.

STEP 19: COMPLETE THE IMMUNIZATION SCRIPT OPTION FOR THE CHILD

a. Click the **Immunizations** script option. The **Immunization** screen displays.

b. Select the child's **Immunization Status**.

c. Click **Add**. The **Add Immunization(s)** screen displays.

> **NOTE:** Many organizations do not require staff to record each vaccine received. Consult the leadership in your organization before completing the **Immunization** screen.

d. Select the type of vaccine in **Vaccine ID**.

e. Enter or select the date the vaccine was administered in **Date**.

> **NOTE:** Select the **On-site** check box if the vaccine was administered on-site at the WIC office.

f. Do one of the following:

- To record another vaccine: Click **Next**, and repeat the two preceding steps.
- To continue the certification process after all vaccines have been recorded: Click **Done**.

g. Click **Close**.

STEP 20: COMPLETE THE VENA SCRIPT OPTION FOR THE CHILD

a. Click the **VENA** script option. The **VENA** screen displays.

b. Click **Add Contact**. The **VENA Contact** screen displays.

> **NOTE:** The **VENA Contact** screen displays a **Question** for you to ask the applicant and a box in which to enter the applicant's **Answer**. In addition, you have the ability to assign risk factors based on the answers that the applicant gives. After you've asked the question, entered the answer, and assigned any necessary risk factors, you will click **Next** to display the next question. The number of questions for which you're required to collect answers is displayed in the title bar at top of the screen. When you've completed the last of the questions, you'll click **Finish** to complete the VENA contact.

c. Enter the applicant's answer to the displayed **Question** in the box under **Answer**.

NOTE: If the applicant's **Answer** requires the assignment of a risk factor, click **Add** under **Risk Factors**, select all applicable risk factors in the list displayed on the **Select Risk Factors** screen, and then click **OK**.

d. Click **Next**.

NOTE: You can click **Previous** to return to a prior question at any time.

e. Repeat the two previous steps until you have answered all of the VENA contact questions, then click **Finish**.

NOTE: The **VENA Contacts** tree list is refreshed to display the newly added contact information. VENA contacts display in reverse chronological order. So, the most recent contact displays at the top of the list. Risk factors assigned during the selected VENA contact display in the **Risk Factors Assigned from this VENA Contact** list box.

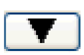
f. Click **Close**.

STEP 21: COMPLETE THE RISK FACTOR SCRIPT OPTION FOR THE CHILD

a. Click the **Risk Factors** script option. The **Certification Risk Factors** screen displays.

b. Select a risk factor in the **Available** list.

c. Click the **Select** button (pictured below) to move a risk factor highlighted in the **Available** list to the **Selected** list.



d. Repeat the two previous steps, as necessary, until all applicable risk factors have been moved to the **Selected** list.

e. Click **OK**.

NOTE: Notice that selected risk factors are displayed in the **Risk Factors** table under **Household Member Information**. The **Risk Factors** table displays both CPA and system defined risk factors.

STEP 22: COMPLETE THE REFERRAL/OTHER PROGRAMS SCRIPT OPTION FOR THE CHILD

a. Click the **Referrals/Other Programs** script option. The **Referrals and Other Programs** screen displays.

b. Select a program in the **Available** list.

c. Click the **Select** button to move a program highlighted in the **Available** list to the **Selected** list.

d. Repeat the two previous steps, as necessary, until all applicable programs have been moved to the **Selected** list.

e. Click **Add**. The **Add Referral Contact Information** screen displays.

f. Enter or select the date of the referral in **Date of Referral(s)**.

g. Select a program or organization in the **Available** tree list.

h. Click the **Select** button (pictured below) to move a program or organization highlighted in the **Available** tree list to the **Selected** tree list.

i. Repeat the two previous steps, as necessary, until all applicable programs and organizations have been moved to the **Selected** tree list.

j. Click **OK**.

k. Click **OK**.

STEP 23: COMPLETE THE NUTRITION EDUCATION SCRIPT OPTION FOR THE CHILD

a. Click the **Nutrition Education** script option. The **Nutrition Education Contacts** screen displays.

b. Click **Add Individual Contact**. The **Individual Nutrition Education Contact** screen displays.

> **NOTE:** The leadership in your organization may mark certain topics as being required topics of discussion during the initial system setup process. Required topics of discussion are pre-selected (in blue) and cannot be deselected. You must discuss these pre-selected topics with the applicant.

c. Select additional topics to be discussed in the **Topics Discussed** list.

d. Click **OK**.

e. Click **Close**.

STEP 24: COMPLETE THE FOOD PRESCRIPTION SCRIPT OPTION FOR THE CHILD

a. Click the **Food Prescription** script option. The **Food Prescriptions** screen displays.

> **NOTE:** The system builds default food prescriptions for the client based on information such as WIC category, health information, and assigned risk factors.

b. View the system-built food prescription in the **Food Prescriptions** tree list.

> **NOTE:** Select a food prescription date in the tree list and then click **Edit** to tailor a food prescription.

c. Click **Close**.

STEP 25: COMPLETE THE SOAP NOTE SCRIPT OPTION FOR THE CHILD

a. Click the **SOAP Note** script option. The **Create SOAP Note** screen displays.

b. Enter the **SOAP Note Text**, entering complete information in the Subjective, Objective, Assessment, and Plan sections.

c. Click **OK**.

STEP 26: COMPLETE THE CPA-DETERMINED FOLLOW-UP SCRIPT OPTION FOR THE CHILD

a. Click the **CPA-determined Follow-up** script option. The **CPA-determined Follow-up** screen displays.

b. Complete the **CPA-determined Follow-up** screen, making a selection in every list.

c. Click **OK**.

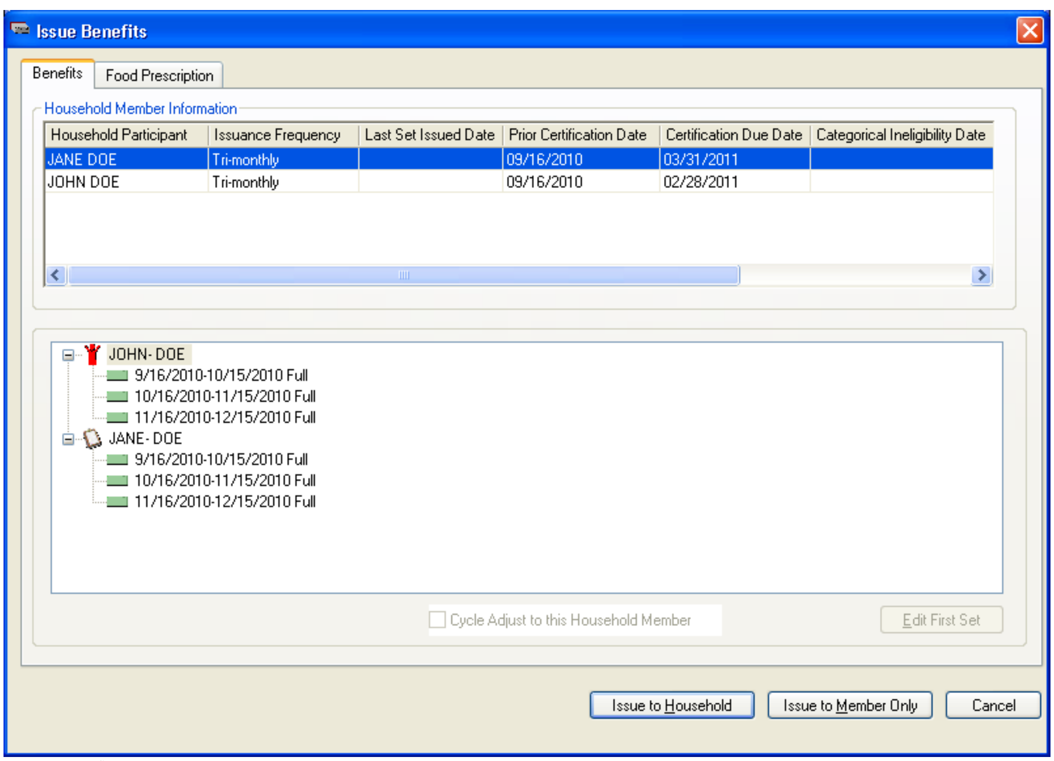
STEP 27: CHECK FOR ERRORS AND ISSUE BENEFITS FOR BOTH THE WOMAN AND THE CHILD

a. Click the **Issue Benefits** script option. The child's certification is reviewed, and if the information recorded is correct and complete, the **Applicant is Certified** screen displays.

> **NOTE:** The **Schedule Appointment** and **Generate Appointment Notice** check boxes are selected by default. Marking the **Schedule Appointment** check box will prompt the system to display the **Schedule Appointment** screen near the end of the Certification process enabling you to schedule a follow-up appointment. Mark or clear the check boxes as necessary.

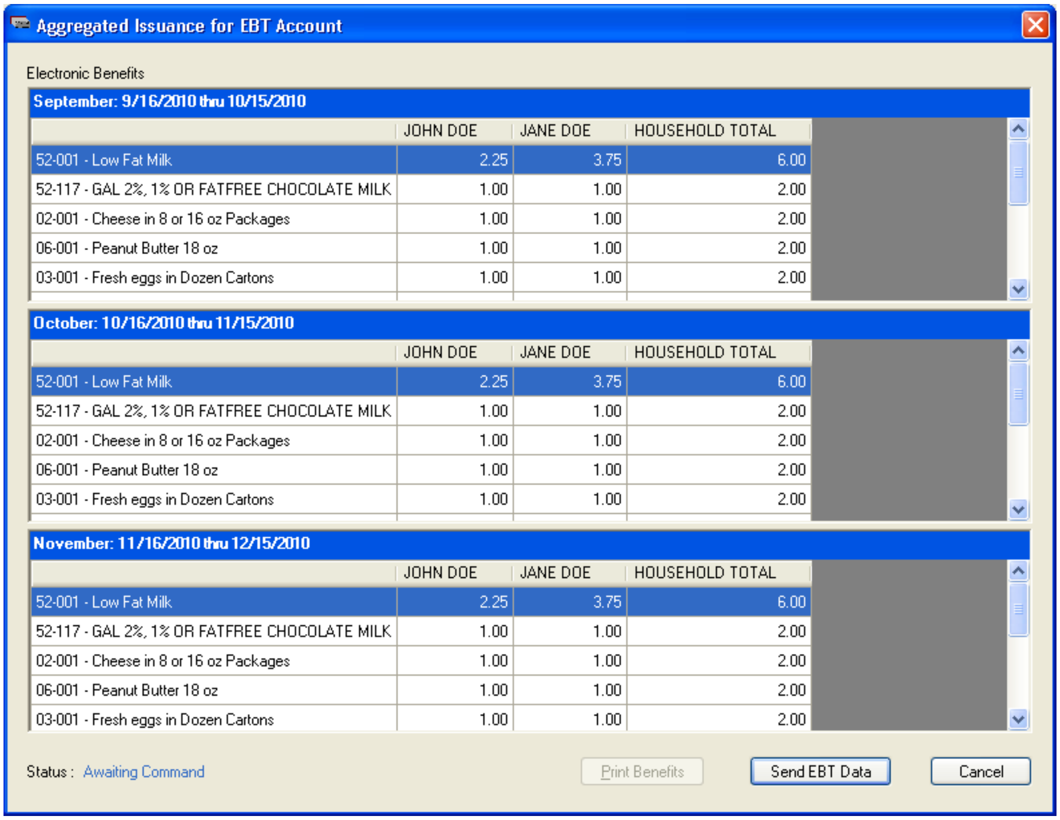
> **NOTE:** At this point in the process, both the woman and child have completed the Certification process. They met the requirement for participation in the WIC program, are now eligible to receive WIC benefits, and are considered WIC participants.

b. Click **OK**. The **Issue Benefits** screen displays with the **Benefits** tab selected. The tree list displays the household members eligible to receive checks.



Issue Benefits Screen

c. Click **Issue to Household** to issue benefits for the Household. The **Aggregated Issuance for EBT Account** screen displays.



Aggregated Issuance for EBT Account Screen

NOTE: Under **Household TOTAL**, food items for the entire Household are aggregated (or totaled) by category and sub-category and displayed by benefit period. For example, assume 2 members of a Household are issued the same type of milk. One member receives 2.25 gallons of milk and the other member receives 3.75 gallons of milk. In this case, 6 gallons of milk (2.25+3.75=6) displays for each benefit period.

NOTE: Use the scroll bar, located to the right of each benefit period, to view a complete list of food items issued to the Household.

NOTE: The **Print Benefits** button is disabled (or turned off) until **Send EBT Data** is clicked. After **Send EBT Data** is clicked, the **Print Benefits** button is enabled (or turned on).

d. Click **Send EBT Data** to issue Household benefits. You are returned to the **Aggregated Issuance for EBT Account** screen.

NOTE: The system transmits EBT issuance data and updates the EBT system. Once the EBT system is updated, the **Print Benefits** button is enabled (or turned on).

STEP 28: VIEW OR GENERATE A RECEIPT OF FOOD ITEMS ISSUED TO THE HOUSEHOLD

a. Click **Print Benefits** to view or generate a receipt of food items issued to the Household. The **Generate EBT Receipt Report** screen displays.

b. Select one of the following **Report Destination** options to specify the destination of the generated receipt and then click **OK**:

- **Display on Screen** – Click this option to display the receipt on the computer's monitor after the receipt is generated.
- **Send to Printer** – Click this option to send the receipt to the selected output printer.
- **Save as PDF** – Click this option to save the receipt as a PDF file after it is generated.

> **NOTE:** If you selected:
>
> - **Display on Screen**: Click **Close** after you are finished viewing the receipt information. You are then returned to the **Aggregated Issuance for EBT Account** screen.
> - **Send to Printer**: A receipt of food items issued to the Household is sent to the selected printer and you are returned to **Aggregated Issuance for EBT Account** screen. If you have not set your default printers prior to clicking **OK**, the **Set Default Printers** screen displays prompting you to set default printers. Select a printer for each option and then click **OK**. Now, a receipt is sent to the selected printer and you are returned to **Aggregated Issuance for EBT Account** screen.
> - **Save as PDF**: Browse to the desired location and click **Save**. A copy of the receipt is saved to the selected location and you are then returned to the **Aggregated Issuance for EBT Account** screen.

c. Click **Close** to dismiss the **Aggregated Issuance for EBT Account** screen. The **Schedule Appointments** screen displays.

STEP 29: SCHEDULE A FOLLOW-UP APPOINTMENT FOR EACH CLIENT

a. Select either the **Schedule Appointment** or **Schedule Group Education Class**. The **Schedule Appointments for Household** screen displays.

b. Schedule a follow-up appointment for both the woman and the child, completing all required **Appointment Information** and clicking **OK**.

> **NOTE:** The **Confirm Scheduled Appointment** screen displays for each appointment scheduled. You have the option of selecting the **Generate Appointment Notice** check box and specifying whether you want it printed **Now** or **Later**..

c. Click **Close**. The **Capture Electronic Signature** screen displays for the Rights and Responsibilities statement.

STEP 30: CAPTURE AN ELECTRONIC SIGNATURE TO CONFIRM THE CLIENTS' RECEIPT OF THE RIGHTS AND RESPONSIBILITIES STATEMENT

NOTE: At this time the mother would sign the ePad to acknowledge her receipt of the Rights and Responsibilities statement.

a. Click **Capture Electronic Signature**. The woman's signature is displayed under **Authorized Signature**.

b. If the signature is acceptable, click **Save Signature**. You are returned to the child's Participant Folder. You may continue working with the child's record as necessary.

Searching for a Client

Scenario Set-up: You will use the **Participant List** screen to search for a client. A client can be either a WIC applicant or participant. A WIC applicant is an individual who is applying for participation in the WIC program. A WIC participant is an individual who has been certified for participation in the WIC program and receives benefits. Both applicants and participants can be located using the **Participant List** screen.

The process includes the following system tasks:

- Indicating the view of the database to search using the **Where to Search** radio buttons
- Determining the search criteria to apply using one or more group boxes
- Viewing search results and working with the client record(s), if applicable

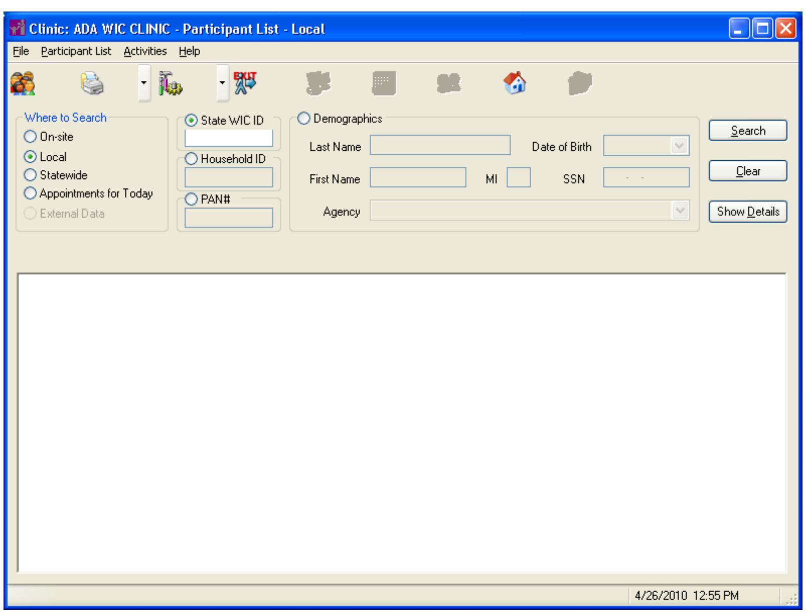
NOTE: Access to the system is managed by local and/or State Office administration. Consult the leadership in your organization if you have questions concerning your level of system access.

NOTE: Press the **F1** key at any time to access help for the current application screen. Each screen's help topic explains the screen's function and describes its content.

Complete the Following Steps to Search for a Client Record:

STEP 1: INDICATE THE VIEW OF THE DATABASE TO SEARCH

a. Display the **Participant List** screen.



Participant List Screen

NOTE: The **Participant List** screen displays upon the completion of the Login process. The **Participant List** table displays clients as determined by the search criteria applied to the list. Until a search is conducted, no content displays in the **Participant List** table.

b. Select one of the following **Where to Search** options to indicate which view of a database to search:

- **On-site** – Click this option to indicate that only clients who WIC staff have marked as being physically present at the Clinic of Operation should be included in the search.
- **Local** – Click this option to indicate that only clients assigned to the Clinic of Operation should be included in the search.
- **Statewide** – Click this option to indicate that all clients in the state should be included in the search.
- **Appointments for Today** – Click this option to indicate that only clients who have appointments scheduled for the current date at the Clinic of Operation should be included in the search.

NOTE: The Clinic of Operation refers to the clinic you selected during the Login process.

STEP 2: DETERMINE THE SEARCH CRITERIA TO APPLY

a. Select one of the following group box options and complete the associated information:

- **State WIC ID** – Select this option, and then enter a State WIC ID in the box to search for a client's State WIC ID.
- **Household ID** – Select this option, and then enter a Household ID in the box to search for clients with a specific Household ID.
- **PAN #** – Select this option, and then swipe an EBT card through the card reader to search for clients with a specific PAN #.
- **Demographics** – Select this option, and then complete one or more of the following fields to search using demographic information:
  - **Last Name** – Enter a complete or partial last name for which to search. Try to provide as much of the name as possible. The more letters provided, the more specific the search will be, and the less time it will take to complete.
  - **First Name** – Enter a complete or partial first name for which to search. Try to provide as much of the name as possible. The more letters provided, the more specific the search will be, and the less time it will take to complete.
  - **MI** – Enter a middle initial for which to search.
  - **Date of Birth** – Enter or select a date of birth for which to search.
  - **SSN** – Enter a social security number for which to search.
  - **Agency** – Select a WIC agency in which to search.

NOTE: The **PAN #** can be entered manually if necessary. All EBT cards for your State will begin with the same eight (8) digits. Therefore, you only need to enter the last eight (8) digits and you can omit any leading zeros (0) as well. For example, if the **PAN #** is 5482 2839 0001 3409, then you only need to enter 13409. You can omit the 3 digits preceding 13409 because they are zeros (0). While manual entry of the **PAN #** is permitted, it is recommended that you always swipe an EBT card through a card reader to prevent manual entry errors.

> **NOTE:** Click **Clear** to clear and reset the search information as necessary.

STEP 3: VIEW THE SEARCH RESULTS AND WORK THE CLIENT RECORD(S)

a. Click **Search** to apply the specified search criteria.

> **NOTE:** The content of the **Participant List** table is refreshed to display clients whose information matches the specified search criteria. If the client for which you are searching is not displayed in the table, you can repeat the steps above, as necessary, until the client is located or until all search options have been exhausted.

> **NOTE:** If you searched by **PAN #**, the **Toggle Applicant/Participant On-site** screen displays enabling you to mark the client on-site, if desired. To complete the **Toggle Applicant/Participant On-site** screen:
>
> a) Mark the **Toggle Applicant/Participant On-site** check box.
>
> b) Click **OK** to process the screen.
>
> Regardless of whether you marked the client on-site or clicked **Cancel** to dismiss the **Toggle Applicant/Participant On-site** screen, you are directed to the **View Appointments for Date** screen. If the client has a scheduled appointment, you may indicate that the client has kept their scheduled appointment. To complete the **View Appointments for Date** screen:
>
> a) Select the row displaying the client's name in the **Schedule Appointments** table.
>
> b) Click **Mark as Kept** to indicate the client has kept their scheduled appointment. The selected row is updated to display the action.
>
> c) Repeat the previous step to indicate other members of the same Household have kept their appointments as well, if applicable. Once you have finished, click **Close** to dismiss the **View Appointments for Date** screen.
>
> Regardless of whether you updated the **View Appointments for Date** screen or clicked **Cancel** to dismiss the **View Appointments for Date** screen, you are returned to the **Participant List** screen.

> **NOTE:** Select a row in the **Participant List** table and click **Show Details** to display additional information for the selected client. When you are finished viewing the additional information, click **Hide Details** to hide the additional client information.

> **NOTE:** Click **Clear** to clear and reset the search information as necessary.

Replacing an EBT Card

Scenario Set-up: A participant requests one of her current EBT cards be replaced with a new EBT card. EBT cards may need to be replaced periodically due to an EBT card being in poor condition or due to the Household misplacing the EBT card. In this case, assume the participant's current EBT card is in poor condition and you would like to replace it with a new EBT card.

The process includes the following system tasks:

- Deactivating the current EBT card using the **Benefit Management** menu
- Assigning a replacement EBT card using the **Benefit Management** menu
- Sending (or transmitting) the updates to the EBT system

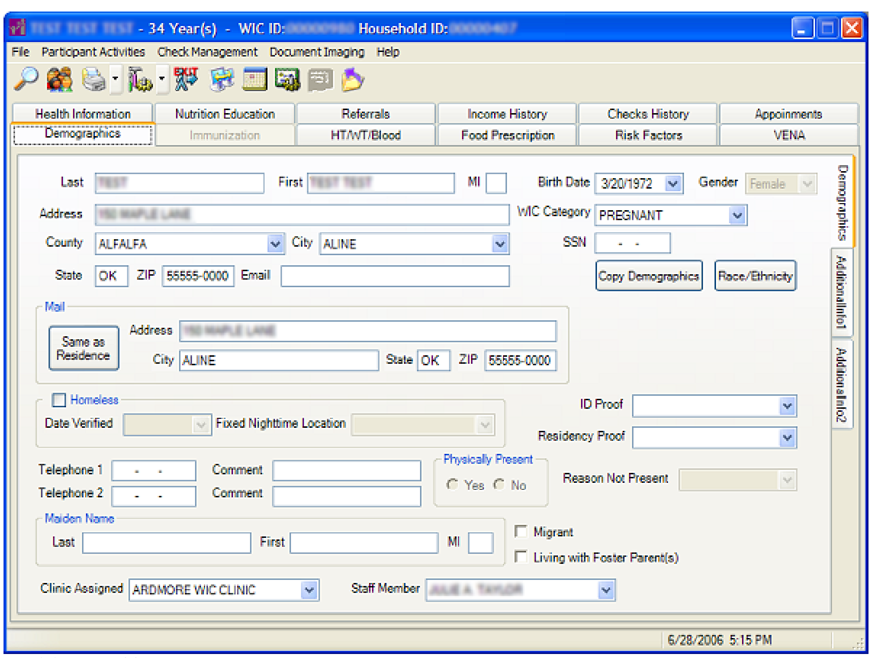
NOTE: Access to the system is managed by local and/or State Office administration. Consult the leadership in your organization if you have questions concerning your level of system access.

NOTE: Press the **F1** key at any time to access help for the current application screen. Each screen's help topic explains the screen's function and describes its content.

Complete the Following Steps to Replace an EBT Card:

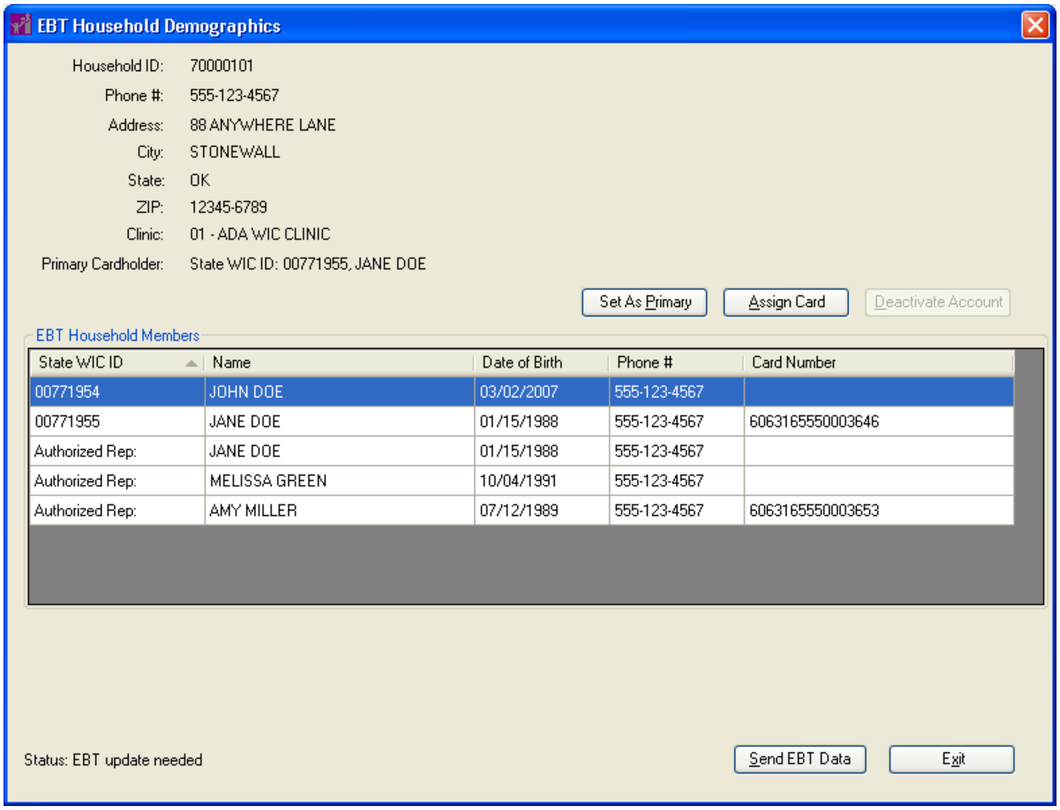
STEP 1: DEACTIVATE THE CURRENT EBT CARD

a. Search for the client's record and open the client's **Participant Folder**. (For more detail, see the Searching for a Client scenario or press the F1 key to display system help.)



Participant Folder Screen

b. On the **Benefit Management** menu, located on the menu bar at the top of the **Participant Folder**, click **EBT Household Demographics** to manage EBT Household data. The **EBT Household Demographics** screen displays.



EBT Household Demographics Screen

> **NOTE:** The **EBT Household Members** table displays the names of all Household members at the top of the grid followed by the information you entered for each Household member's Authorized Representative, Alternate Authorized Representative, and Proxy information. You can distinguish Household members from Authorized Representatives by viewing the information displayed under the **State WIC ID** column. The system displays a State WIC ID number for each Household member whereas it displays **Authorized Rep** for everyone else.

c. While still on the **EBT Household Demographics** screen, select the row in the grid that displays the EBT card number you intend to replace and then click **Deactivate Card** to deactivate the current EBT card. Once **Deactivate Card** is clicked, the screen is updated and the current EBT card number is cleared from the list.

STEP 2: ASSIGN A REPLACMENT EBT CARD

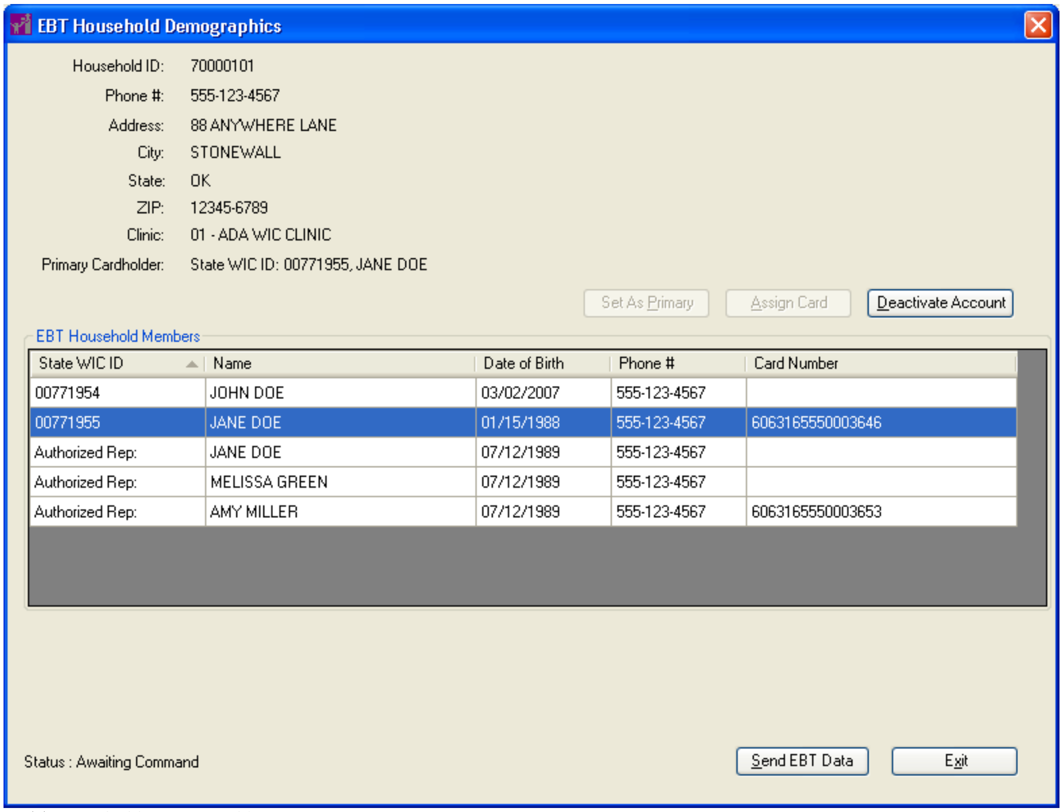
a. While still on the **EBT Household Demographics** screen, with the same row in the grid selected, click **Assign Card** to assign a replacement EBT card. The **Assign Card** screen displays.

Assign Card Screen

b. Swipe an unassigned EBT card through the card reader. The Primary Account Number (**PAN #)** displays in the **Swipe Card or Type PAN** field.

> **NOTE:** The **PAN #** can be entered manually if necessary. All EBT cards for your State will begin with the same eight (8) digits. Therefore, you only need to enter the last eight (8) digits and you can omit any leading zeros (0) as well. For example, if the **PAN #** is 5482 2839 0001 3409, then you only need to enter 13409. You can omit the 3 digits preceding 13409 because they are zeros (0). While manual entry is permitted, it is recommended that you always swipe an EBT card through a card reader to prevent manual entry errors.

c. Click **Save** to assign a card number to the selected individual and to return to the **EBT Household Demographics** screen. The screen is refreshed to list the **Card Number** entered.

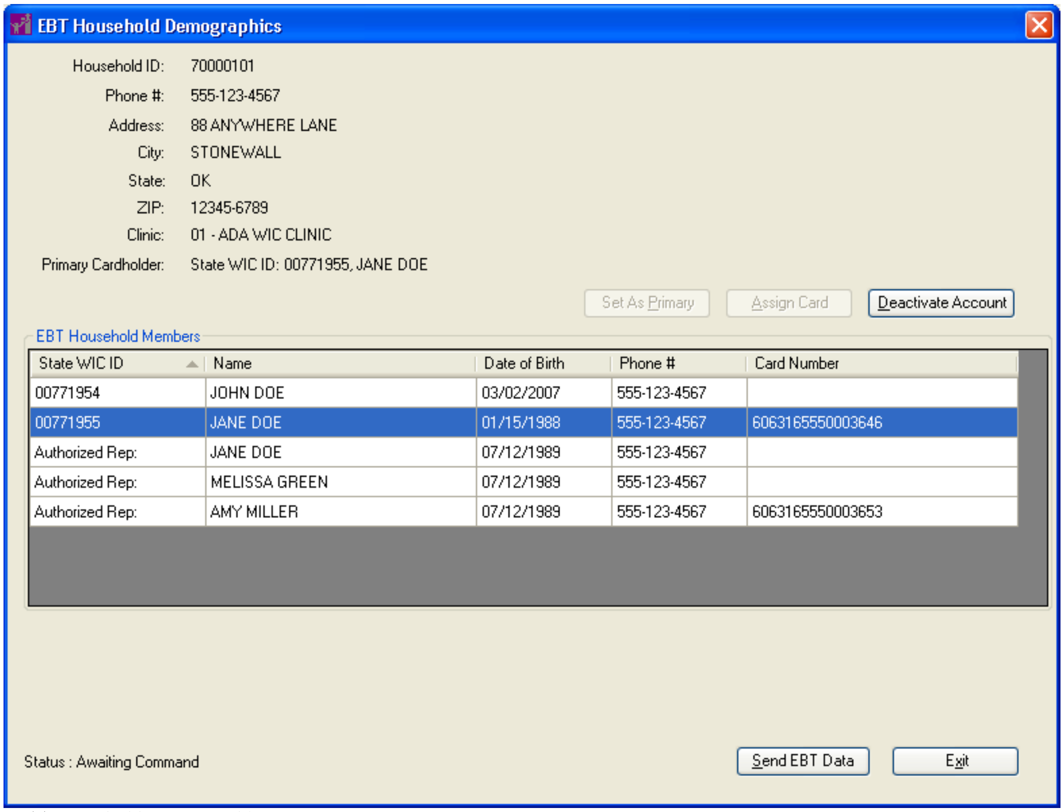


EBT Household Demographics Screen

NOTE: The **Status** label is updated and displays **Replacement Card**.

NOTE: A maximum of two (2) EBT cards can be assigned to a Household. You are to assign an EBT card to the individual designated as the **Primary Card Holder** and you can assign one (1) additional EBT card to another individual.

d. Once you have finished assigning a replacement EBT card, click **Send EBT Data** to transmit and update the information in the EBT system.



EBT Household Demographics Screen

NOTE: The **Send EBT Data** button is disabled after it is clicked and the **Status** display in the lower, left-hand corner of the screen indicates **In progress.**

e. Once the task of updating the EBT information is complete, a confirmation screen displays. Click **OK** to dismiss the confirmation screen and to return to the Participant Folder. You may continue working with the participant as necessary.

NOTE: The system automatically dismisses the **EBT Household Demographics** screen after you dismiss the confirmation message**.**

Completing a Formula Change Using the Food Adjustment Wizard

Scenario Set-up: You certified a formula fed infant a few days ago and issued 3 months of WIC benefits for the standard, contract infant formula. The mother redeemed a portion of the infant's benefit amount for this month and the infant has consumed some of the formula. After attempting to feed the formula to her infant for several days, she has found that her infant cannot tolerate it. Her infant's pediatrician has written a special prescription for another formula. She is returning to the clinic to exchange the unused cans of formula and the unredeemed portion of the infant's benefit amount in order to receive this new formula.

The process includes the following system tasks:

- Completing the **Food Adjustment Wizard** - Change a food already issued process for a formula food item

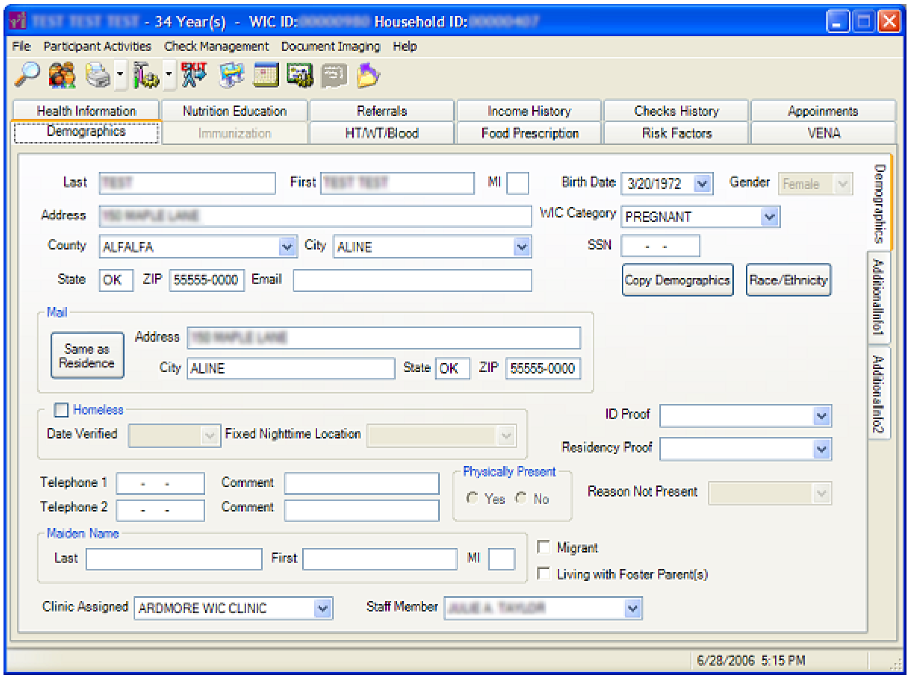
> **NOTE:** Access to the system is managed by local and/or State Office administration. Consult the leadership in your organization if you have questions concerning your level of system access.

> **NOTE:** Press the **F1** key at any time to access help for the current application screen. Each screen's help topic explains the screen's function and describes its content.

Complete the Following Steps to Complete a Formula Food Item Change:

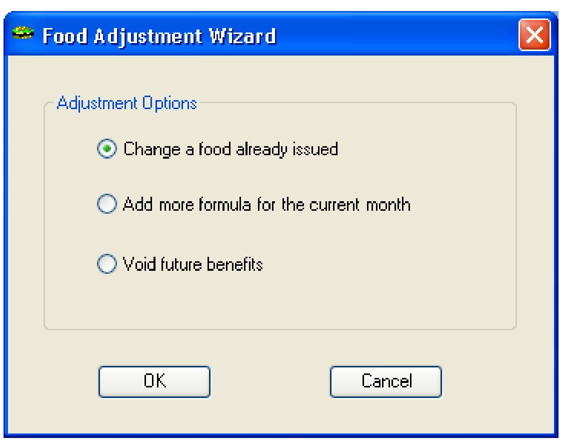
STEP 1: COMPLETE THE FOOD ADJUSTMENT WIZARD – CHANGE A FOOD ALREADY ISSUED PROCESS (FOR A FORMULA FOOD ITEM)

a. Search for the infant's record and open the infant's **Participant Folder**. (For more detail, see the Searching for a Client scenario in the Clinic Training Manual or press the F1 key to display system help.)



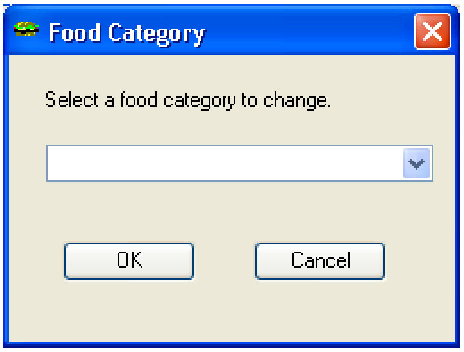
Participant Folder Screen

b. On the **Benefit Management** menu, located on the menu bar at the top of the **Participant Folder**, click **Food Adjustment Wizard** to make adjustments to the previously issued benefit amount. The **Food Adjustment Wizard** screen displays.



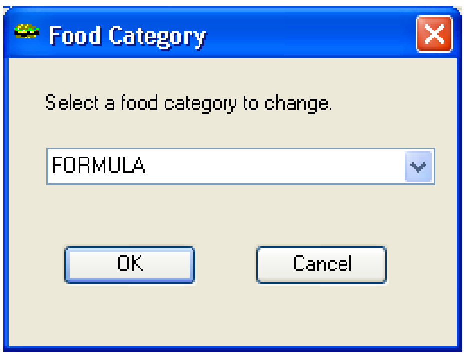
Food Adjustment Wizard Screen

c. Select the **Change a food already issued** radio button, then click **OK**. The **Food Category** screen displays.



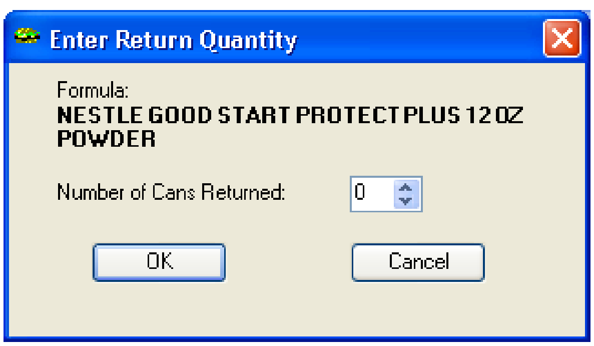
Food Category Screen

d. Select a category of Formula.



Food Category Screen

e. Click **OK** to confirm your selection. The **Enter Return Quantity** screen displays.



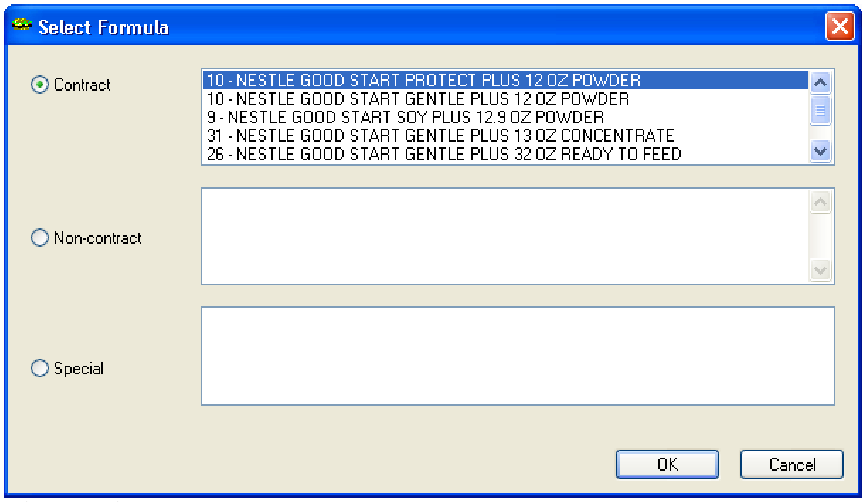
Enter Return Quantity Screen

NOTE: If a category of Formula is selected and the infant is marked as breastfeeding on the **Health Information** tab, it is required that you verify the infant's breastfeeding status before you are able to utilize the **Food Adjustment Wizard**. Update the **Date Breastfeeding Verified** field on the **Health Information** tab and then return to the **Food Adjustment Wizard**.

NOTE: The system displays the type of formula initially issued to the infant. Enter the number of unused cans being returned to the clinic. Do not include the unredeemed formula for this benefit period. For example, assume the infant was initially issued 10 cans of powdered formula per benefit period. The infant's mother redeemed 5 of the 10 cans for the current benefit period.

The infant consumed 3 of the 5 cans purchased resulting in 2 unused cans of formula. Therefore, in this case, you would enter or select 2 for the **Number of Cans Returned**.

f. Enter or select the unused cans returned to the clinic in **Number of Cans Returned** and click **OK** to save your selection. The **Select Formula** screen displays.



Select Formula Screen

g. To complete the **Select Formula** screen, select **Contract**, **Non-contract**, or **Special** to specify the appropriate category of formula, and then select the appropriate formula from the chosen list.

h. Click **OK** to confirm your selection.

NOTE: If you selected the **Special** option on the **Select Formula** screen, the **Special Prescription Item** screen displays. To complete the **Special Prescription Item** screen:

a) Enter or select the **Start Date** and **End Date** of the special prescription.

b) Select the **Reason** for the prescription.

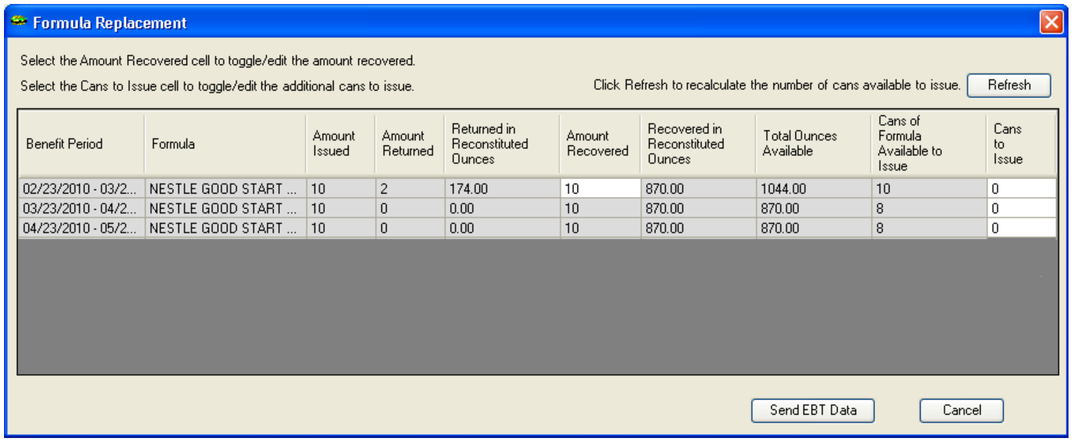
c) Enter the authorizing **Physician's Name**.

d) Indicate whether the received authorization was verbal or written by selecting the **Verbal** check box or leaving it cleared.

e) Click **OK** to confirm the information you provided.

Regardless of whether the **Special** option was selected, the **Formula Replacement** screen displays.

i. Enter or select the number of formula cans recovered from the EBT system for the current benefit period in **Amount Recovered.**



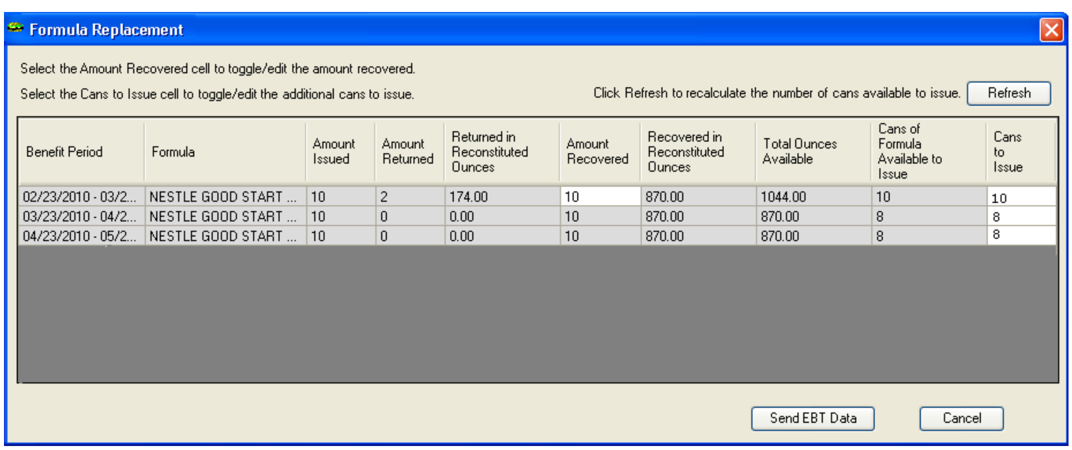
Benefit Period	Formula	Amount Issued	Amount Returned	Returned in Reconstituted Ounces	Amount Recovered	Recovered in Reconstituted Ounces	Total Ounces Available	Cans of Formula Available to Issue	Cans to Issue
02/23/2010 - 03/2...	NESTLE GOOD START ...	10	2	174.00	10	870.00	1044.00	10	0
03/23/2010 - 04/2...	NESTLE GOOD START ...	10	0	0.00	10	870.00	870.00	8	0
04/23/2010 - 05/2...	NESTLE GOOD START ...	10	0	0.00	10	870.00	870.00	8	0

NOTE: The **Amount Recovered** field defaults to the amount of formula remaining in the EBT system for the current benefit period. For example, assume 10 cans of formula were issued to the infant and the mother redeemed 5 cans. Then the **Amount Recovered** field will display the remainder which is 5 cans.

In the case of partially breastfed infants, the default amount in the **Amount Recovered** field may not accurately display the benefit amount available to the infant. This is the case where the infant was not issued the maximum benefit amount during the first benefit period. To correct this matter, you are given the opportunity to modify the amount for the current month. For example, assume a partially breastfed infant was eligible to receive a maximum of 10 cans of formula per benefit period, but the mother opted to receive 5 cans instead of the maximum benefit amount. Then, assume the mother went to the grocery store and redeemed 2 of the 5 cans of formula. In this case, the amount remaining in the EBT system would be 3 cans. However, the infant would be eligible to receive a total of 8 cans of formula (3 unredeemed cans + 5 unissued cans).

NOTE: If you modify the defaulted amount in the **Amount Recovered** field, click **Refresh** to update the information listed in the **Cans of Formula Available to Issue** column.

j. Enter or select the number of formula cans to issue for each benefit month in **Cans to Issue**.



Benefit Period	Formula	Amount Issued	Amount Returned	Returned in Reconstituted Ounces	Amount Recovered	Recovered in Reconstituted Ounces	Total Ounces Available	Cans of Formula Available to Issue	Cans to Issue
02/23/2010 - 03/2...	NESTLE GOOD START ...	10	2	174.00	10	870.00	1044.00	10	10
03/23/2010 - 04/2...	NESTLE GOOD START ...	10	0	0.00	10	870.00	870.00	8	8
04/23/2010 - 05/2...	NESTLE GOOD START ...	10	0	0.00	10	870.00	870.00	8	8

k. Click **Send EBT Data** to transmit and update the information stored in the EBT system.

NOTE: Once **Send EBT Data** is clicked, the system will do the following:

- Add a food prescription for today's date consisting of the type and quantity of formula selected.
- Add a food prescription for tomorrow's date consisting of the type and quantity of formula selected unless zero (0) was entered or selected for any future benefit period. In this case, the system will delete all future-dated food prescriptions and it will add a zero (0) item food prescription which will require you to add a new food prescription for the infant before the next set of benefits can be issued. A system message will prompt you to add the new food prescription the next time the infant's **Participant Folder** is opened.
- If zero (0) was entered or selected for any future benefit period, the system will void all future benefits for every member of the Household and then reissue the benefits for the Household without formula.

NOTE: Once the EBT system is updated, you will have the opportunity to print a "shopping list" for the Household that lists the available food items including the newly prescribed formula.

Completing a Food Item Change (Not Formula) Using the Food Adjustment Wizard

Scenario Set-up: You certified a child a few days ago and issued WIC benefits that include Lowfat milk. The child needs soy milk instead. The mother has returned to the clinic and requests that the previously issued milk item be replaced with soy milk.

The process includes the following system tasks:

- Completing the **Food Adjustment Wizard** - Change a food already issued process (for a non-formula food item)

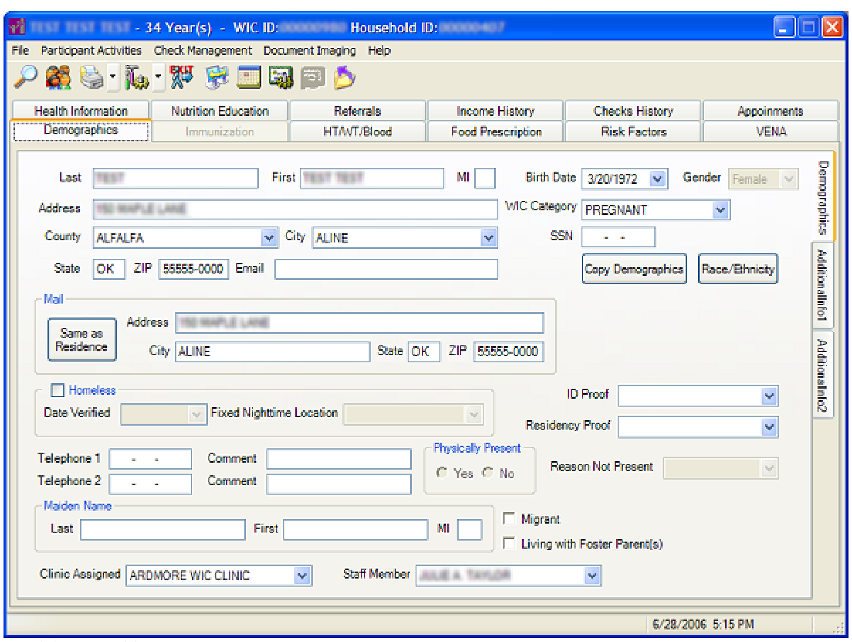
> **NOTE:** Access to the system is managed by local and/or State Office administration. Consult the leadership in your organization if you have questions concerning your level of system access.

> **NOTE:** Press the **F1** key at any time to access help for the current application screen. Each screen's help topic explains the screen's function and describes its content.

Complete the Following Steps to Complete a Non-Formula Food Item Change:

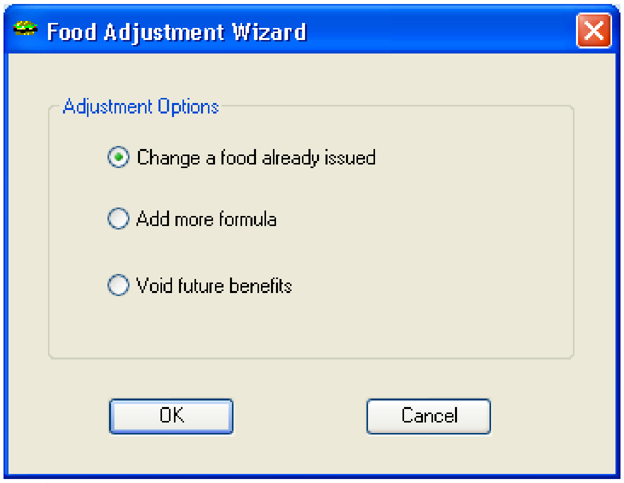
STEP 1: COMPLETE THE FOOD ADJUSTMENT WIZARD – CHANGE A FOOD ALREADY ISSUED PROCESS (FOR A NON-FORMULA FOOD ITEM)

a. Search for the child's record and open the child's **Participant Folder**. (For more detail, see the Searching for a Client scenario in the Clinic Training Manual or press the F1 key to display system help.)



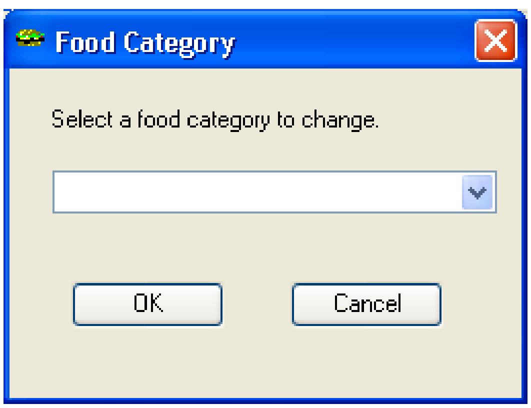
Participant Folder Screen

b. On the **Benefit Management** menu, located on the menu bar at the top of the **Participant Folder**, click **Food Adjustment Wizard** to make adjustments to the previously issued benefit amount. The **Food Adjustment Wizard** screen displays.



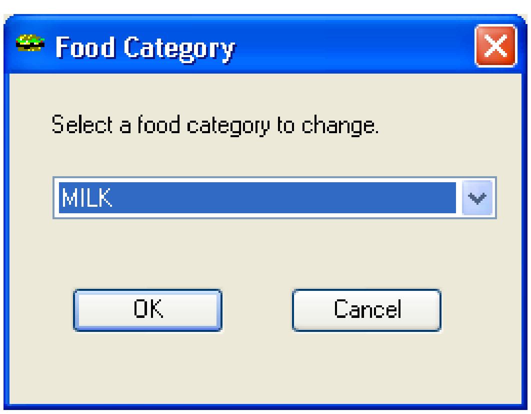
Food Adjustment Wizard Screen

c. Select the **Change a food already issued** radio button, then click **OK**. The **Food Category** screen displays.



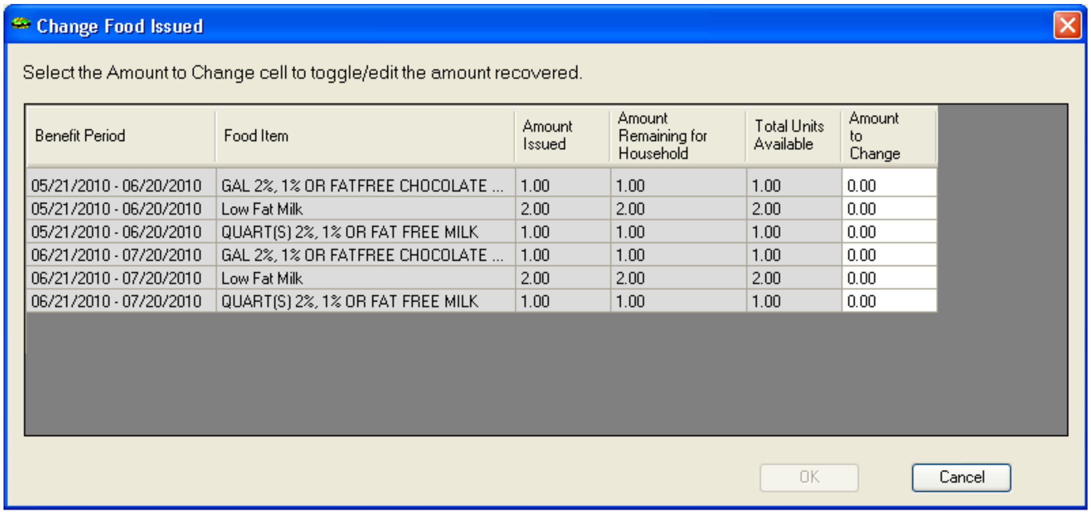
Food Category Screen

d. Select the desired food category to change.



Food Category Screen

e. Click **OK** to confirm your selection. The **Change Food Issued** screen displays.



Change Food Issued Screen

NOTE: The **Change Food Issued** screen displays the amount of food issued to this participant for the selected food category along with the amount remaining in the EBT system for the Household.

NOTE: Each cell in the **Amount to Change** column defaults to zero (0) regardless of the amount issued to the participant or the amount remaining for the Household. You can change these amounts as long as:

- the amounts do not exceed the amount issued to the participant
- the amounts do not exceed the amount remaining for the Household
- the participant receives the minimum amounts of food per WIC regulations (i.e.- Food Package VII participants must receive at least 1 pound of cheese)

f. Enter or select an amount to change for each row in **Amount to Change** and click **OK** to process the screen. The **Replacement Food** screen displays.

Replacement Food Screen

g. Select a food item to serve as a replacement and then click **Send EBT Data** to transmit and update the information stored in the EBT system.

NOTE: Once **Send EBT Data** is clicked, the system will do the following:

- Add a food prescription for today's date consisting of the type and quantity of food item selected.
- Add a food prescription for each benefit period you adjusted consisting of the type and quantity of food item selected.

h. Once the task of updating the EBT information is complete, a confirmation screen displays. Click **OK** to dismiss the confirmation screen and to return to the Participant Folder. You may continue working with the participant as necessary.

NOTE: The EBT system is updated to reflect the changes to the Household's benefits.

Adding More Formula to Issued Benefits Using the Food Adjustment Wizard

Scenario Set-up: You certified a partially breastfed infant a few weeks ago and issued formula for less than the maximum benefit amount. The infant has consumed all of the formula. The mother has returned to the clinic and requests more formula be issued for her infant.

The process includes the following system tasks:

- Completing the **Food Adjustment Wizard** – Add more formula to issued benefits process

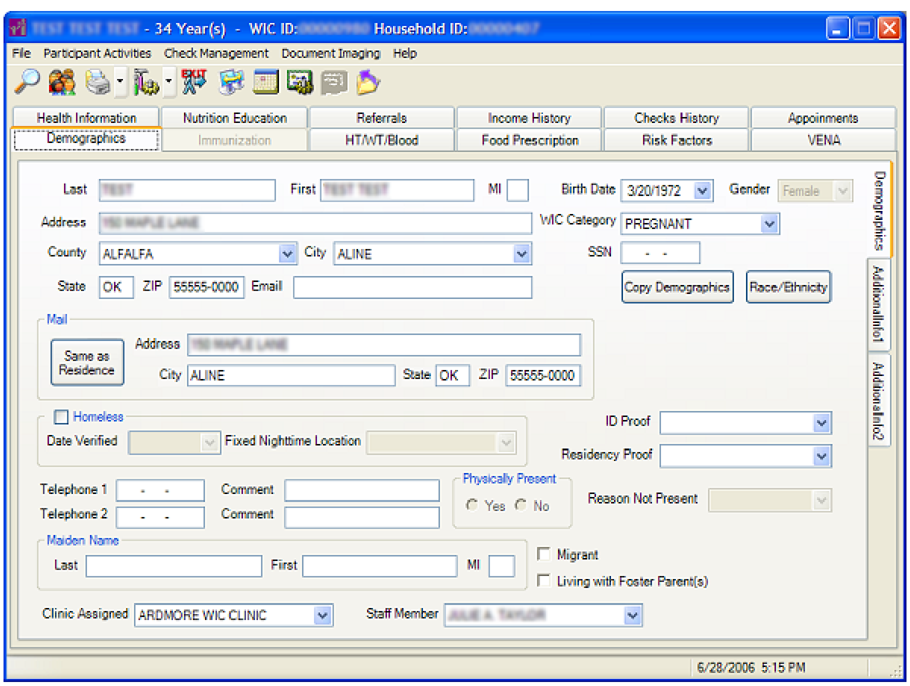
> **NOTE:** Access to the system is managed by local and/or State Office administration. Consult the leadership in your organization if you have questions concerning your level of system access.

> **NOTE:** Press the **F1** key at any time to access help for the current application screen. Each screen's help topic explains the screen's function and describes its content.

Complete the Following Steps to Add Formula to Issued Benefits:

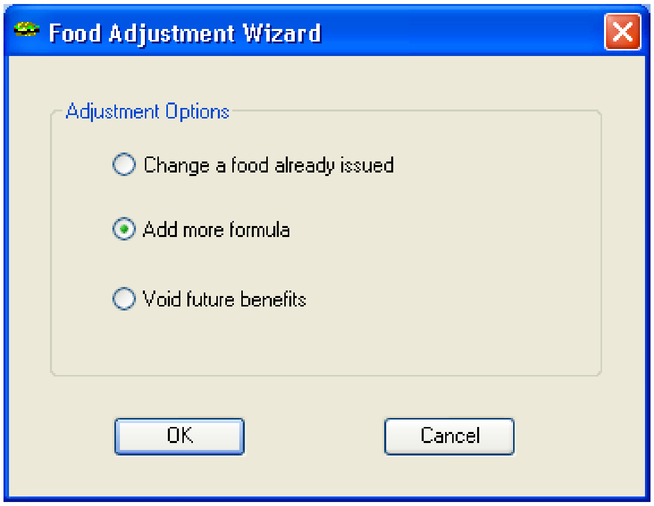
STEP 1: COMPLETE THE FOOD ADJUSTMENT WIZARD – ADD MORE FORMULA TO ISSUED BENEFITS PROCESS

a. Search for the infant's record and open the infant's **Participant Folder**. (For more detail, see the Searching for a Client scenario or press the F1 key to display system help.)



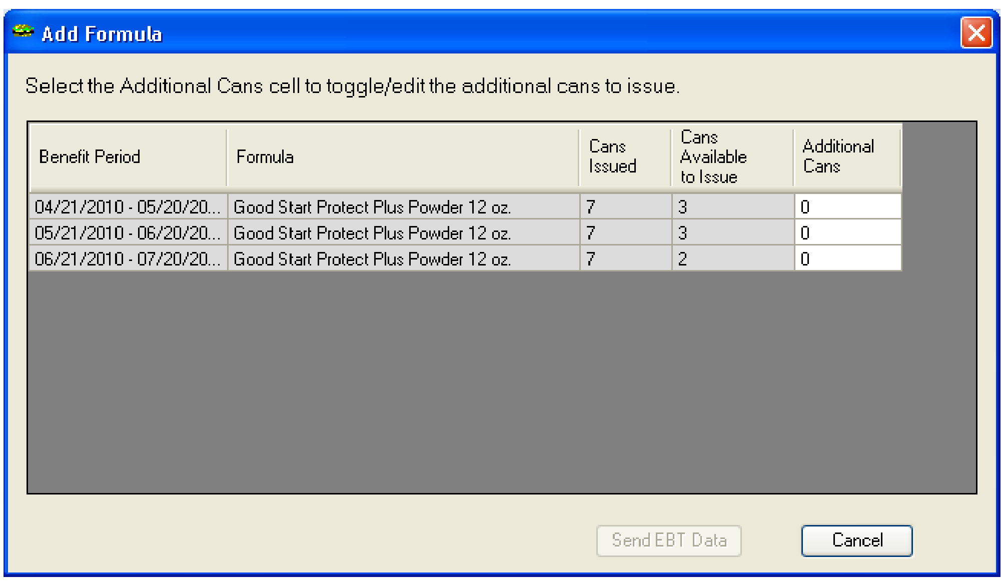
Participant Folder Screen

b. On the **Benefit Management** menu, located on the menu bar at the top of the **Participant Folder**, click **Food Adjustment Wizard** to make adjustments to the previously issued benefit amount. The **Food Adjustment Wizard** screen displays.



Food Adjustment Wizard Screen

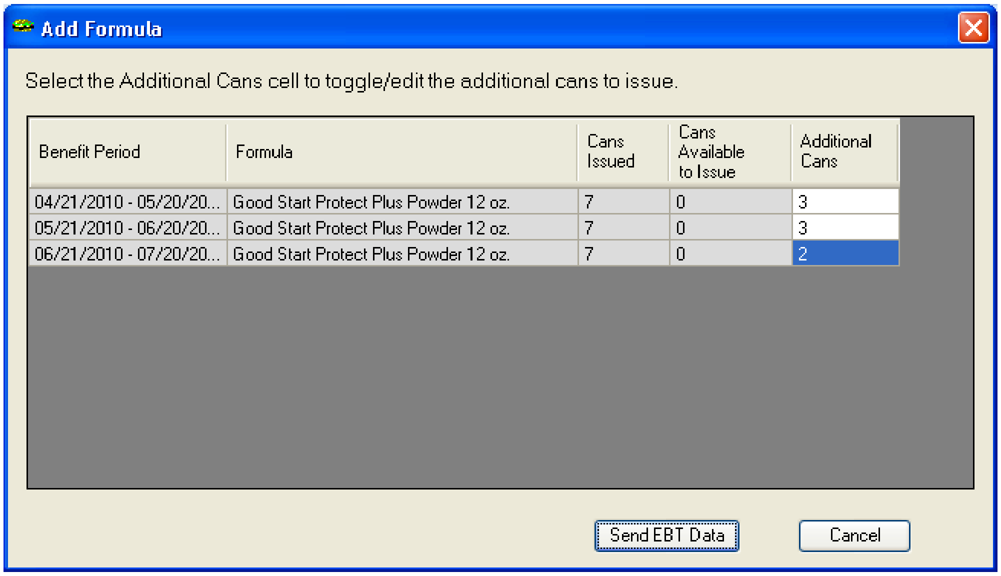
c. Select the **Add more formula** radio button, then click **OK**. The **Add Formula** screen displays.



Add Formula Screen

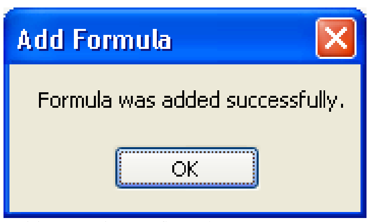
NOTE: The **Cans Available to Issue** column displays the maximum number of cans that could be added (on top of what was already issued) according to the participant's category, age, feeding status, and type of formula issued. Your organization may develop specific guidelines regarding the process of increasing a participant's formula due to efforts to extend breastfeeding duration rates. It may be a good idea to review your local policies and procedures.

d. Enter or select the number of cans to add for each benefit period in **Additional Cans**.



Add Formula Screen

e. Click **Send EBT Data**. A confirmation screen displays.



Add Formula Confirmation Screen

NOTE: The **Send EBT Data** button is disabled (or turned off) until you enter or select the number of additional cans to issue.

f. Click **OK** to dismiss the **Add Formula** confirmation screen. You are returned to the Participant Folder and may continue working with the participant.

NOTE: The system adds a food prescription for today's date consisting of the newly selected can total and for each future-dated benefit period you adjusted. If there are future-dated food prescriptions beyond the benefit period(s) you adjusted, you may need to increase the formula amounts for these prescriptions as well. To do this, click on the **Food Prescription** tab and review the food prescriptions displayed in the tree list. As necessary, select a food prescription in the list and click **Edit**. The **Edit Food Prescription** screen displays. Select the formula item in the list and click **Edit Food Item**. The **Edit Food Item** screen displays. Increase the quantity of the formula item in **Quantity of Item** and then click **OK**. You are returned to the **Edit Food Prescription** screen. Click **OK** to save your changes and to return to the participant's folder.

Voiding Future Benefits using the Food Adjustment Wizard

Scenario Set-up: You are interested in voiding one or more future-dated benefits. You will utilize the **Food Adjustment Wizard** to accomplish this task.

The process includes the following system tasks:

- Completing the **Food Adjustment Wizard** – Void future benefits process

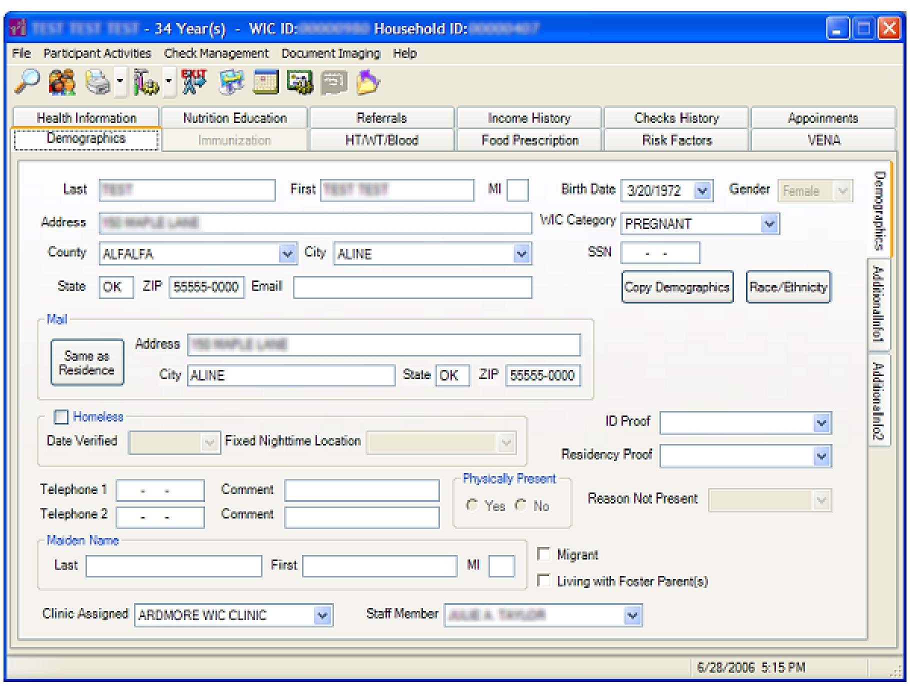
NOTE: Access to the system is managed by local and/or State Office administration. Consult the leadership in your organization if you have questions concerning your level of system access.

NOTE: Press the **F1** key at any time to access help for the current application screen. Each screen's help topic explains the screen's function and describes its content.

Complete the Following Steps to Void Future Benefits:

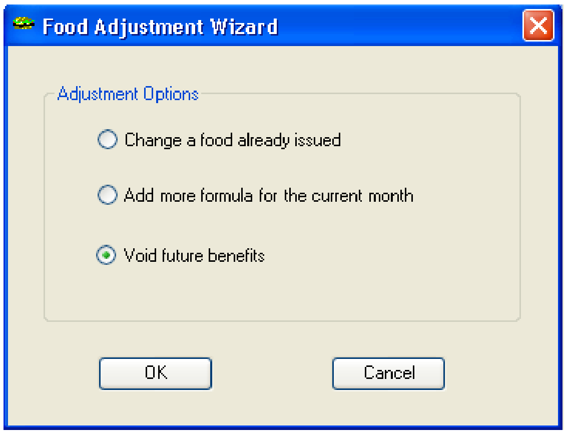
STEP 1: COMPLETE THE FOOD ADJUSTMENT WIZARD – VOID FUTURE BENEFITS PROCESS

a. Search for the child's record and open the child's **Participant Folder**. (For more detail, see the Searching for a Client scenario in the Clinic Training Manual or press the F1 key to display system help.)



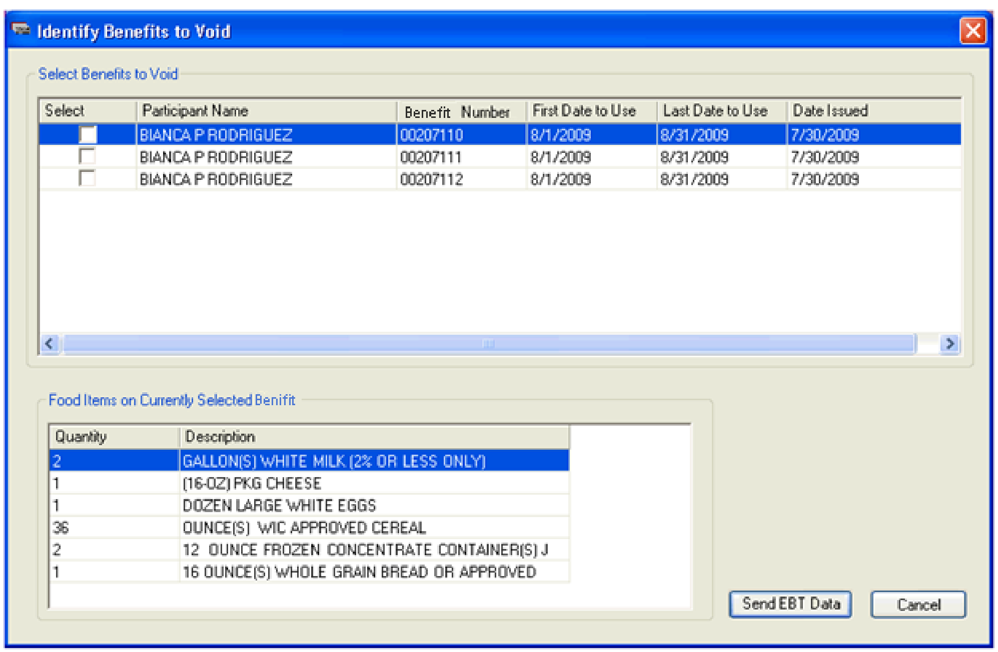
Participant Folder Screen

b. On the **Benefit Management** menu, located on the menu bar at the top of the **Participant Folder**, click **Food Adjustment Wizard** to make adjustments to the previously issued benefit amount. The **Food Adjustment Wizard** screen displays.



Food Adjustment Wizard Screen

c. Select the **Void future benefits** radio button, then click **OK**. The **Identify Benefits to Void** screen displays.



Identify Benefits to Void Screen

d. Carefully select one or more check boxes in the **Select** column of the **Select Benefits to Void** table to indicate the benefit period(s) to void.

NOTE: Be aware that all food items issued to the participant for the benefit period(s) selected will be voided. If your intent is merely to change a food item or add more formula to a benefit month, then use one of the other **Food Adjustment Wizard** options.

e. Click **Send EBT Data** to transmit and update the information in the EBT system. Once the process of updating the EBT information is complete, you are returned to the Participant Folder and may continue working with the selected client as necessary.

Viewing the EBT Card History for a Household

Scenario Set-up: You are interested in viewing a history of activity concerning the EBT cards related to a Household. An option for you to query and display card history information stored on the EBT system is listed in the **Benefit Management** menu. You will be able to view a list of cards currently or previously associated to the Household, the date in which the card was activated, deactivated, or reported lost, and an indicator identifying whether the card was marked as a Primary card for the Household.

The process includes the following system tasks:

- Querying the EBT system and viewing a history of EBT card information associated to the Household using the **Benefit Management** menu

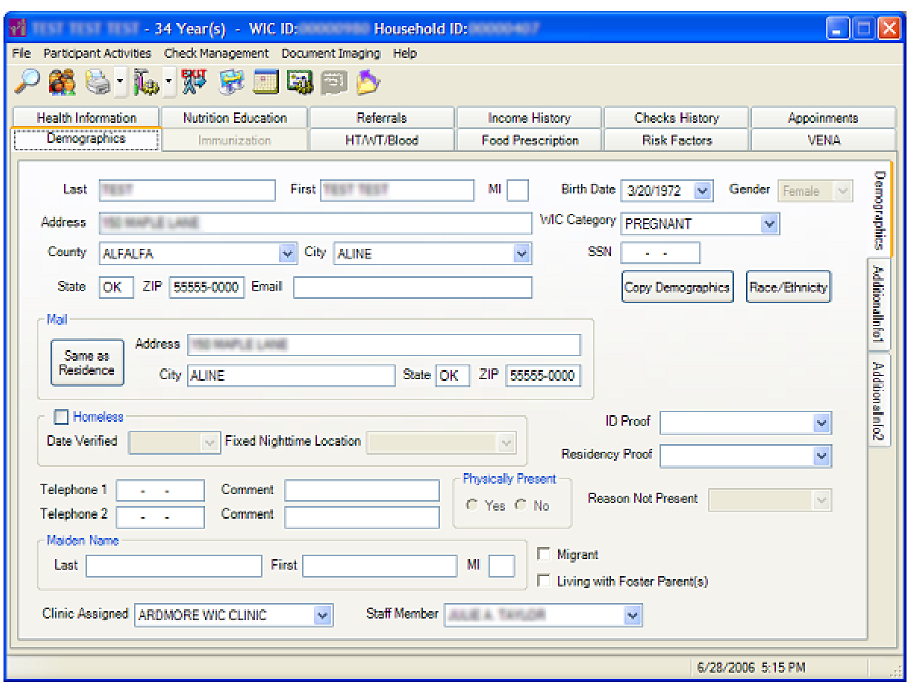
NOTE: Access to the system is managed by local and/or State Office administration. Consult the leadership in your organization if you have questions concerning your level of system access.

NOTE: Press the **F1** key at any time to access help for the current application screen. Each screen's help topic explains the screen's function and describes its content.

Complete the Following Steps to View the EBT Card History for a Household:

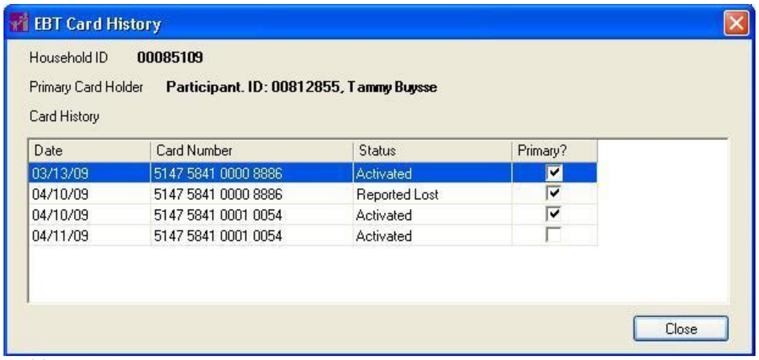
STEP 1: QUERY THE EBT SYSTEM AND VIEW A HISTORY OF EBT CARD INFORMATION

a. Search for the infant's record and open the infant's **Participant Folder**. (For more detail, see the Searching for a Client scenario in the Clinic Training Manual or press the F1 key to display system help.)



Participant Folder Screen

b. On the **Benefit Management** menu, located on the menu bar at the top of the **Participant Folder**, click **View EBT Card History** to view a history of EBT card information associated to the Household. The **EBT Card History** screen displays.



EBT Card History Screen

NOTE: When **View EBT Card History** is clicked, the system queries the EBT system behind-the-scenes and displays the current Household's associated information in the **Card History** table.

NOTE: The information displayed in the **Card History** table is a view-only and cannot be modified. If you are interested in managing EBT card information for the current household, click **Close** to dismiss the **EBT Card History** screen. Then on the **Benefit Management** menu, click **EBT Household Demographics** in order to manage the Household's EBT information.

NOTE: The information listed in the **Date** column refers to the date on which some form of activity occurred with the associated EBT card. Activating or deactivating a card are examples of activities. The activity itself is listed in the **Status** column.

NOTE: Click **Close** when you are finished viewing a history of EBT card information associated with the Household and to return to the **Participant Folder** of the currently selected Household member.

Printing the EBT Account Balance for a Household

Scenario Set-up: You are interested in printing the current month's balance of benefits remaining for a Household including the issued balance for future months. An option for you to query and print benefit information stored on the EBT system concerning the Household's available balance is listed in the **Benefit Management** menu.

The process includes the following system tasks:

- Querying the EBT system and printing the account balance associated to the Household using the **Benefit Management** menu

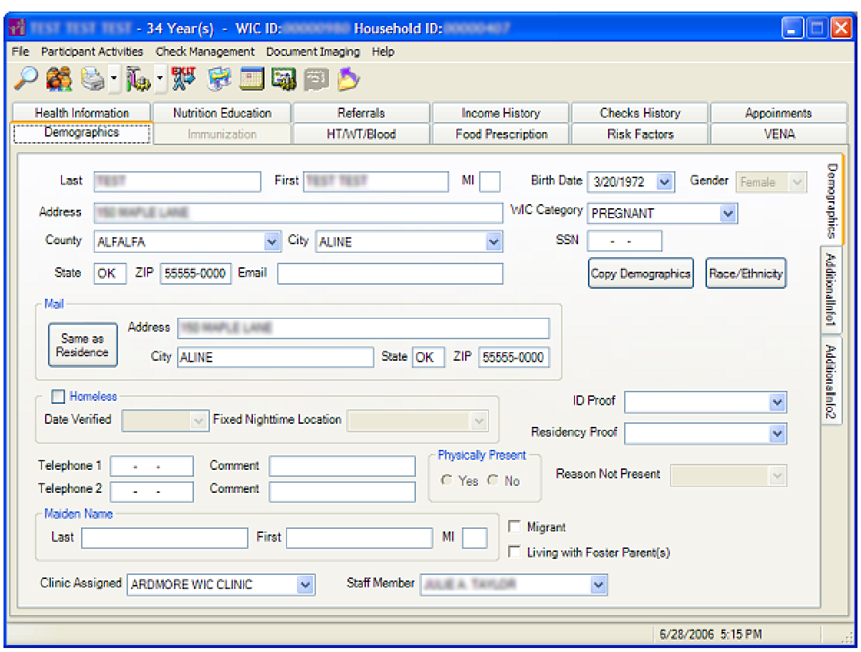
NOTE: Access to the system is managed by local and/or State Office administration. Consult the leadership in your organization if you have questions concerning your level of system access.

NOTE: Press the **F1** key at any time to access help for the current application screen. Each screen's help topic explains the screen's function and describes its content.

Complete the Following Steps to Print the EBT Account Balance for a Household:

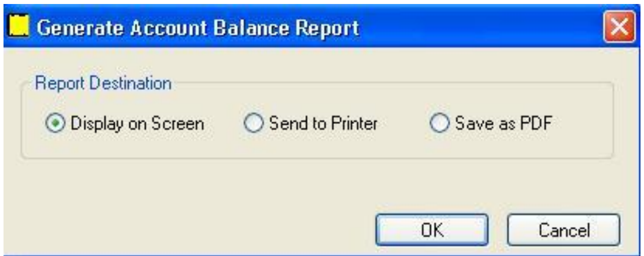
STEP 1: QUERY THE EBT SYSTEM AND PRINT THE ACCOUNT BALANCE

a. Search for the infant's record and open the infant's Participant Folder. (For more detail, see the Searching for a Client scenario in the Clinic Training Manual or press the F1 key to display system help.)



Participant Folder Screen

b. On the **Benefit Management** menu, located on the menu bar at the top of the **Participant Folder**, click **Print EBT Account Balance** to print the available benefit balance information associated to the Household. The **Generate Account Balance Report** screen displays.



Generate Account Balance Report Screen

c. Select the **Display on Screen**, **Send to Printer**, or **Save as PDF** option in the **Report Destination** group box to specify the manner in which to output the information. .

d. Click **OK** to process the **Generate Account Balance Report** screen and to return to the **Participant Folder**.

NOTE: Regardless of the output option you selected, the system generates an aggregated, benefit balance for the Household in real-time. In other words, instead of displaying each member's available benefits separately, the system displays the cumulative total of benefits for all Household members by food item for each benefit month. For example, assume the Household consists of 3 members and each member was issued 4 gallons of skim milk for the current month (12 gallons). Further assume that, so far, the Household has redeemed 2 gallons of milk. In this case, when you print the account balance, an aggregated (or total) amount of 10 gallons of skim milk displays for the Household for the current month.

NOTE: The information displayed in the account balance output is view-only and cannot be modified. If you are interested in adjusting the items or quantity of items issued to the Household for the current month or future months, click **Close** to dismiss the **Account Balance** screen. Then on the **Benefit Management** menu, click **Food Adjustment Wizard** in order to make adjustments to the Household's benefits, if applicable.

NOTE: If you selected the Display on Screen option, click **Close** when you are finished viewing the Household's account balance and to return to the **Participant Folder** of the currently selected Household member.

Viewing the EBT Transaction History for a Household

Scenario Set-up: You are interested viewing the history of activity for a Household. An option for you to query and view information stored on the EBT system is listed in the **Benefit Management** menu.

The process includes the following system tasks:

- Querying the EBT system and viewing the transaction history associated to the Household using the **Benefit Management** menu

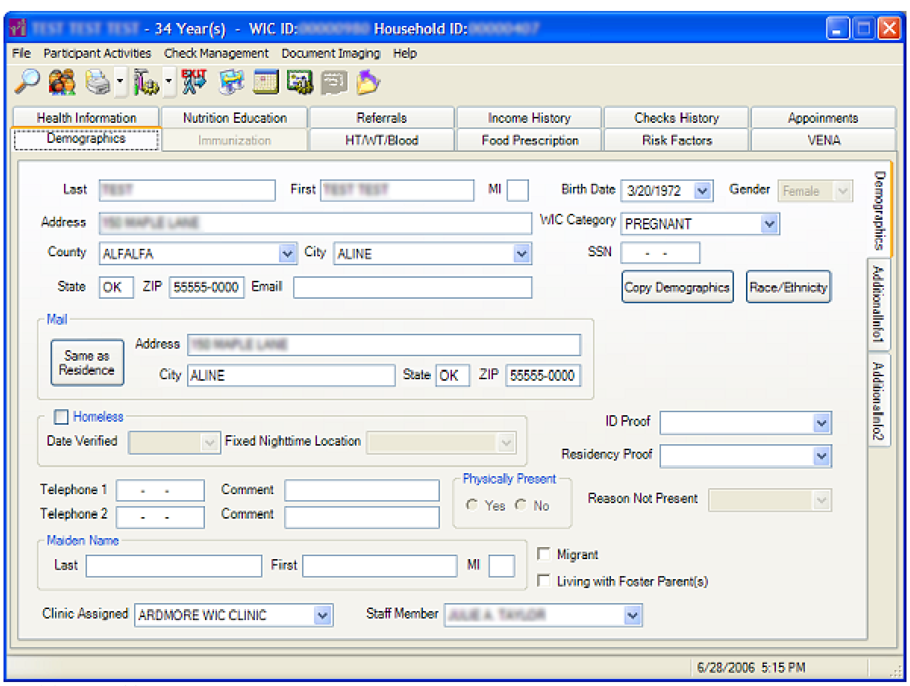
NOTE: Access to the system is managed by local and/or State Office administration. Consult the leadership in your organization if you have questions concerning your level of system access.

NOTE: Press the **F1** key at any time to access help for the current application screen. Each screen's help topic explains the screen's function and describes its content.

Complete the Following Steps to View the EBT Transaction History for a Household:

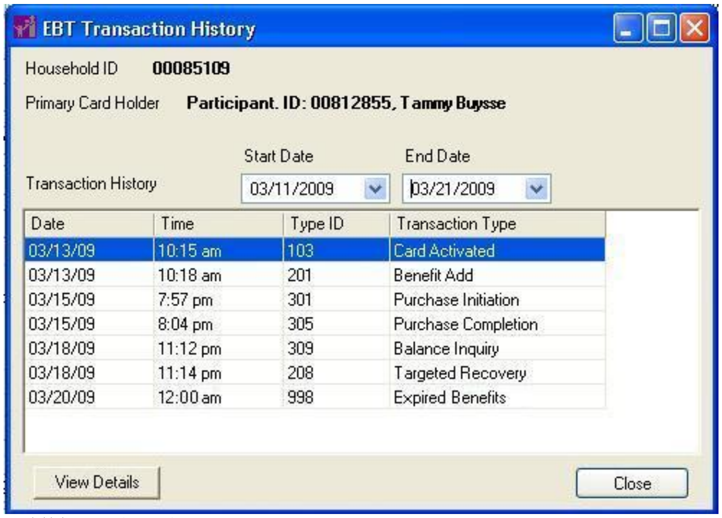
STEP 1: QUERY THE EBT SYSTEM AND VIEW A HISTORY OF EBT CARD INFORMATION

a. Search for the infant's record and open the infant's Participant Folder. (For more detail, see the Searching for a Client scenario in the Clinic Training Manual or press the F1 key to display system help.)



Participant Folder Screen

b. On the **Benefit Management** menu, located on the menu bar at the top of the **Participant Folder**, click **View EBT Transaction History** to view benefit redemption activity associated to the Household for a specified date range. The **EBT Transaction History** screen displays.



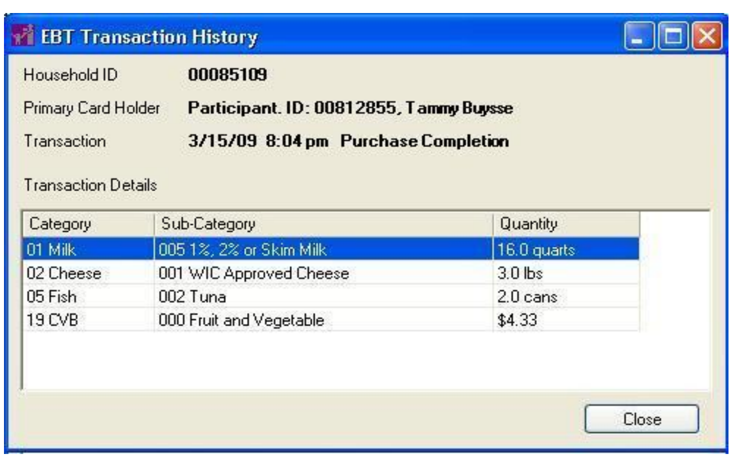
EBT Transaction History Screen

NOTE: Upon opening the **EBT Transaction History** screen, the **Transaction History** table displays the Household's redemption activity for the current month benefit period to today's date.

c. Enter or select the **Start Date** and **End Date** of the benefit range to view.

NOTE: The system automatically queries the EBT system and refreshes the **Transaction History** table when you modify either the **Start Date** or **End Date** values.

d. Once you have displayed the desired range of information, select a row in the table and click **View Details** to view an itemized description of the selected transaction. The EBT Transaction History Details screen displays.



EBT Transaction History Details Screen

NOTE: The information displayed in the **Transaction Details** table is view-only and cannot be modified. If you are interested in adjusting the items or quantity of items issued to the Household for the current month or future months, click **Close** to dismiss the **EBT Transaction History** screen. Then on the **Benefit Management** menu, click **Food Adjustment Wizard** in order to make adjustments to the Household's benefits, if applicable.

NOTE: Click **Close** when you are finished viewing the selected transaction details and to return to the **EBT Transaction History** screen of the currently selected Household member.

Changing a Client's Household ID Number to that of a New Household

Scenario Set-up: A foster mother arrives in clinic and states that a child has been placed in her care. She is interested in being the authorized representative for this child. Assume that the child is a participant at your clinic location and is in a valid certification. In addition, assume that the foster mother has the necessary documentation to complete this change. You will give the child a new Household ID.

The process includes the following system tasks:

- Completing the **EBT Household Change Guided Script** process
  - Opening the Participant Folder and beginning the Change Household ID process
  - Determining the new household
  - Removing current benefits
  - Removing cards
  - Adding benefits to the new household
- Updating the Authorized Representative information on the Additional Info 2 sub-tab

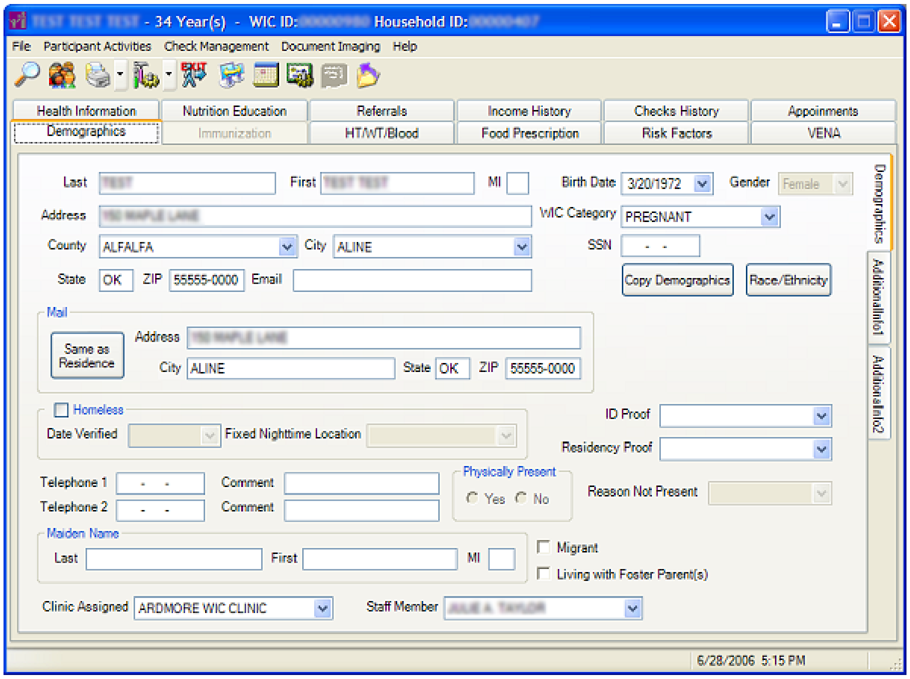
> **NOTE:** Access to the system is managed by local and/or State Office administration. Consult the leadership in your organization if you have questions concerning your level of system access.

> **NOTE:** Press the **F1** key at any time to access help for the current application screen. Each screen's help topic explains the screen's function and describes its content.

Complete the Following Steps to Change a Client's Household ID Number to That of a New Household:

STEP 1: OPEN THE PARTICIPANT'S FOLDER AND BEGIN THE CHANGE HOUSEHOLD ID PROCESS

a. Search for the child's record and open the child's **Participant Folder**. (For more detail, see the Searching for a Client scenario or press the F1 key to display system help.)



Participant Folder Screen

b. On the **Participant Activities** menu, located on the menu bar at the top of the screen, click **Change Household** ID. The **EBT Household Change Guided Script** screen displays.

EBT Household Change Guided Script Screen

NOTE: The **EBT Household Change Guided Script** screen "guides" you through a series of screens (or steps) in order to complete the process of changing the Household ID number. Begin by clicking the **Determine New Household** guided script option. After each step in the process is complete, a red check mark displays in the check box next to the completed link.

NOTE: Click **Cancel** to cancel the process at any time and to return to the Participant Folder. However, once the process is started the Participant Folder is 'locked' and no changes can be made until the Change Household ID process is complete.

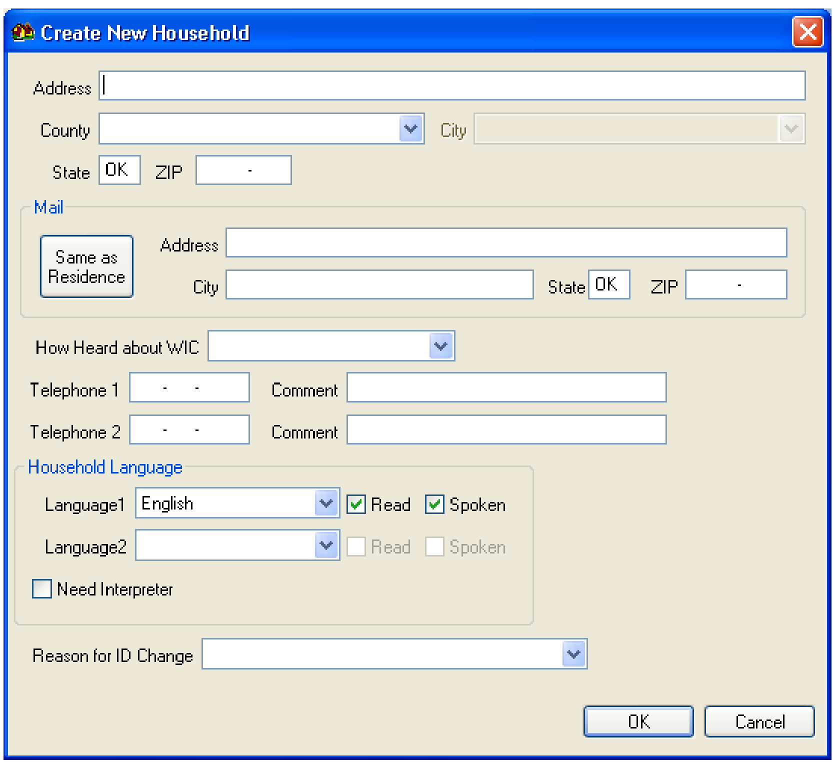
c. Click the **Determine New Household** script option. The **Change Household ID** screen displays.

Change Household ID Screen

NOTE: The client's current information is displayed under **Current Household Information**.

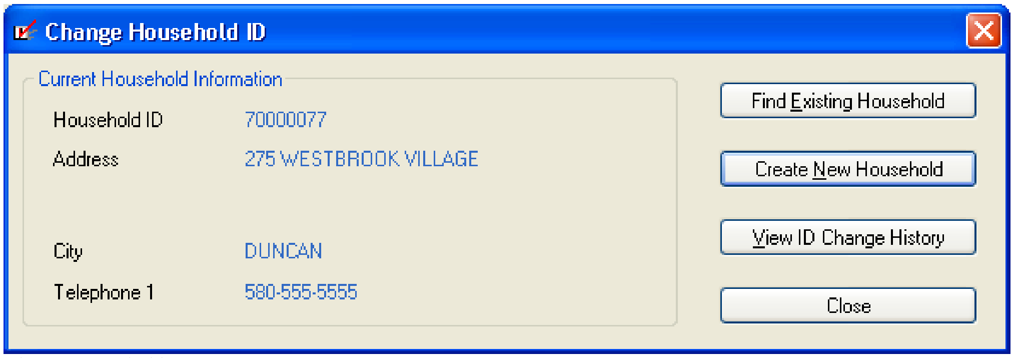
STEP 2: DETERMINE A NEW HOUSEHOLD FOR THE PARTICIPANT

a. Click **Create New Household**. The **Create New Household** screen displays.



Create New Household Screen

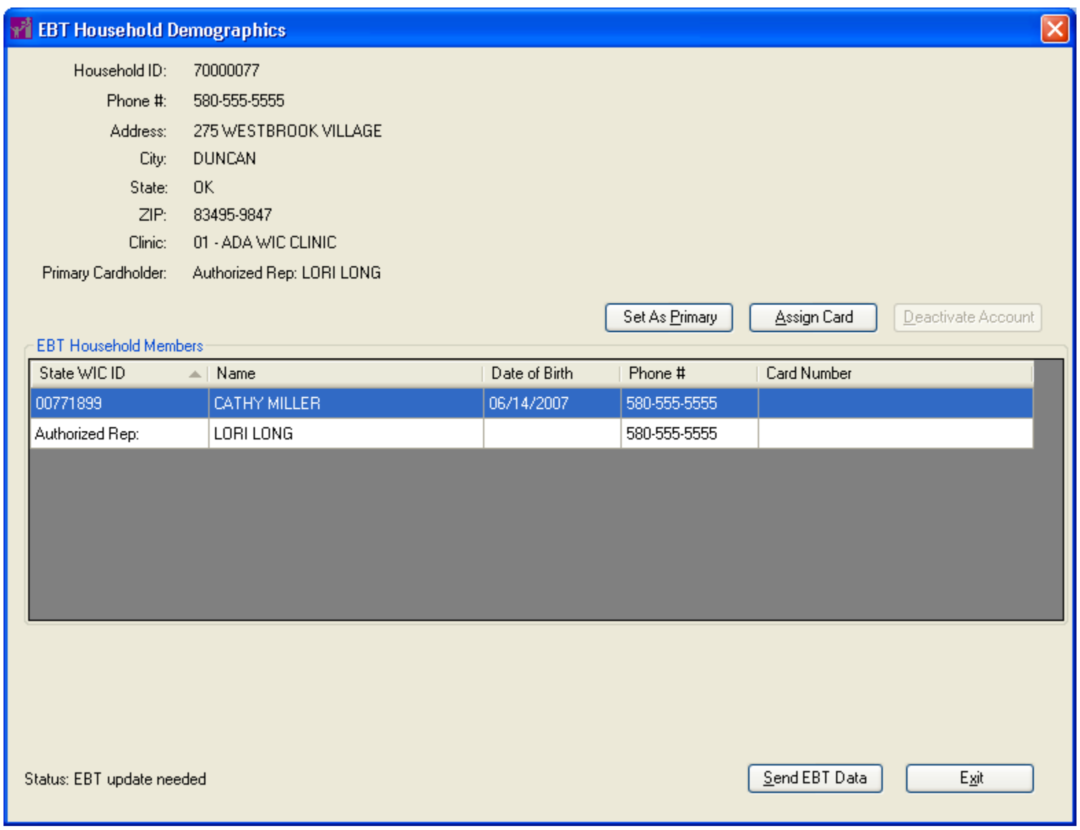
b. Complete the **Create New Household** screen by entering data related to the new Household, then click **OK** to process the screen. You are returned to the **Change Household ID** screen.



Change Household ID Screen

NOTE: The client's new Household information is displayed under **Current Household Information**.

c. Click **Close** to dismiss the **Change Household ID** screen. The **EBT Household Demographics** screen displays.



EBT Household Demographics Screen

d. Complete the **EBT Household Demographics** screen, gathering as much information as possible. (For more detail, see the Issuing EBT Benefits – Setting up the EBT Account for a Household scenario or press the F1 key to display system help.)

NOTE: The purpose of completing **EBT Household Demographics** screen at this stage of the process is to set up a separate EBT account for the new Household you are establishing.

e. Once you have finished updating Authorized Rep information, designated the Primary Card Holder, and assigned EBT cards to the Household, click **Send EBT Data** to transmit and update the information in the EBT system.

f. Once the task of updating EBT information is complete, the **Capture Signature for Card** screen displays. Click **Capture Electronic Signature** to capture the client's signature indicating the receipt of the EBT card(s).

Capture Signature for Card Screen

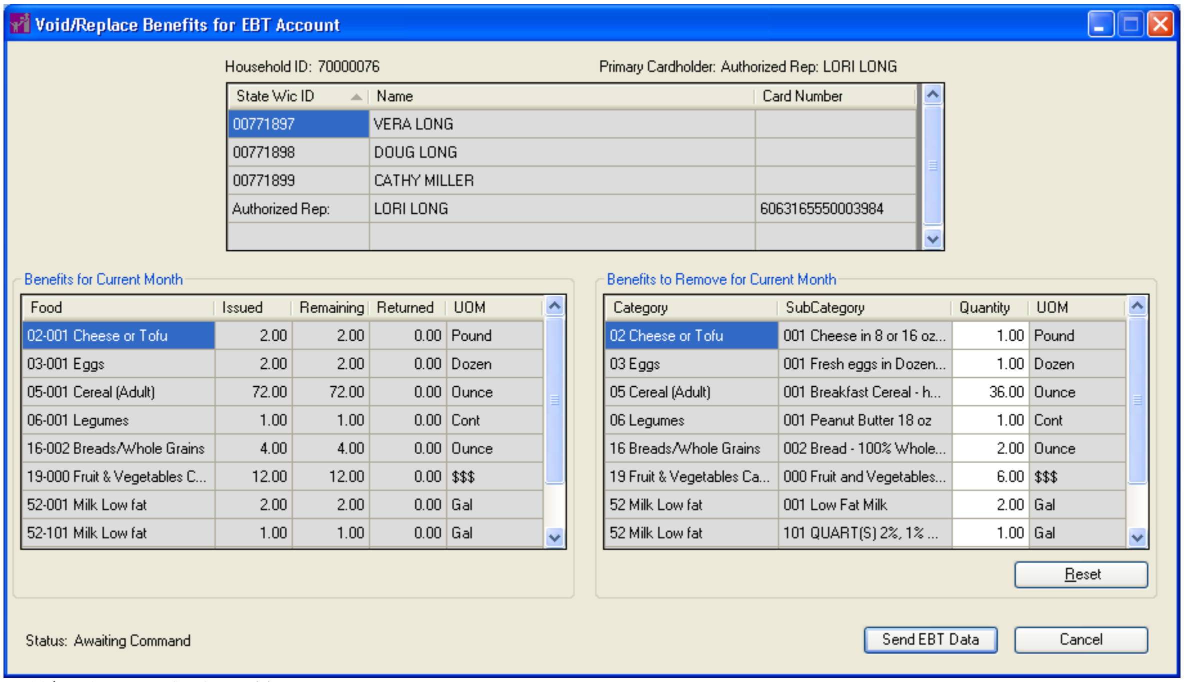
g. After a signature is obtained, click **Save Signature** to save the client's signature. You are returned to the **EBT Household Change Guided Script** screen.

EBT Household Change Guided Script Screen

NOTE: A red check mark is displayed on the screen indicating you have completed the associated step of the process.

STEP 3: REMOVE CURRENT BENEFITS

a. Click **Remove Current Benefits** to move the client's benefits, currently associated to the former EBT account, into the newly established EBT account. The **Void/Replace Benefits for EBT Account** screen displays.



Void/Replace Benefits for EBT Account Screen

NOTE: The former Household's information is displayed near the top of the screen. Issuance information associated to the former Household for the current month is displayed in the **Benefits for Current Month** group box.

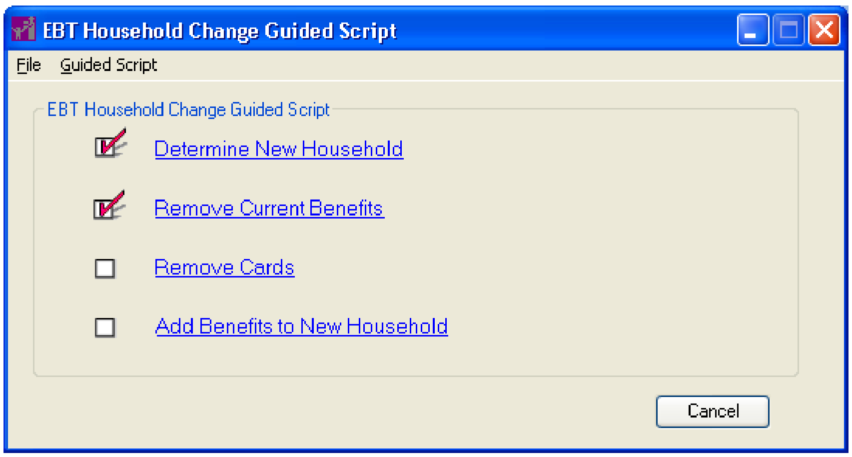
NOTE: Only benefits items that are eligible to be removed are displayed in the **Benefits to Remove for Current Month** group box. Certain benefit items issued to the former Household may not be removed and associated to the newly established Household. For example, assume a Household that included an infant was issued eggs. Then, assume the infant was removed from the Household and a new Household was established for the infant. It would be inappropriate to move eggs into the Household associated to the infant since infants are not permitted to receive eggs per federal WIC guidelines.

NOTE: The amount initially displayed in the **Quantity** column of the **Benefits to Remove for Current Month** group box is determined by dividing the amount remaining for each benefit item by the number of participants issued benefits in like Categories and Subcategories during the benefit period and rounded down. For example, assume 3 Household members were issued Whole milk and 13 gallons of milk remained in the EBT system. If 1 member of the Household were moved into a new Household, the initial amount displayed in the **Quantity** column would be 4 (13/3 = 4 with 1 remaining). The participant being removed from the Household receives an equal portion of each benefit item minus any remainders.

b. In the **Quantity** column of the **Benefits to Remove for Current Month** group box, enter or select the amount of items to remove from the former Household and to associate to the newly established Household.

> **NOTE:** Click **Reset** to return the amounts displayed in the **Quantity** column to their initial values.

c. Click **Send EBT Data** to transmit and update the information stored in the EBT system. Once the process of updating the EBT system is complete, you are returned to the **EBT Household Change Guided Script** screen.

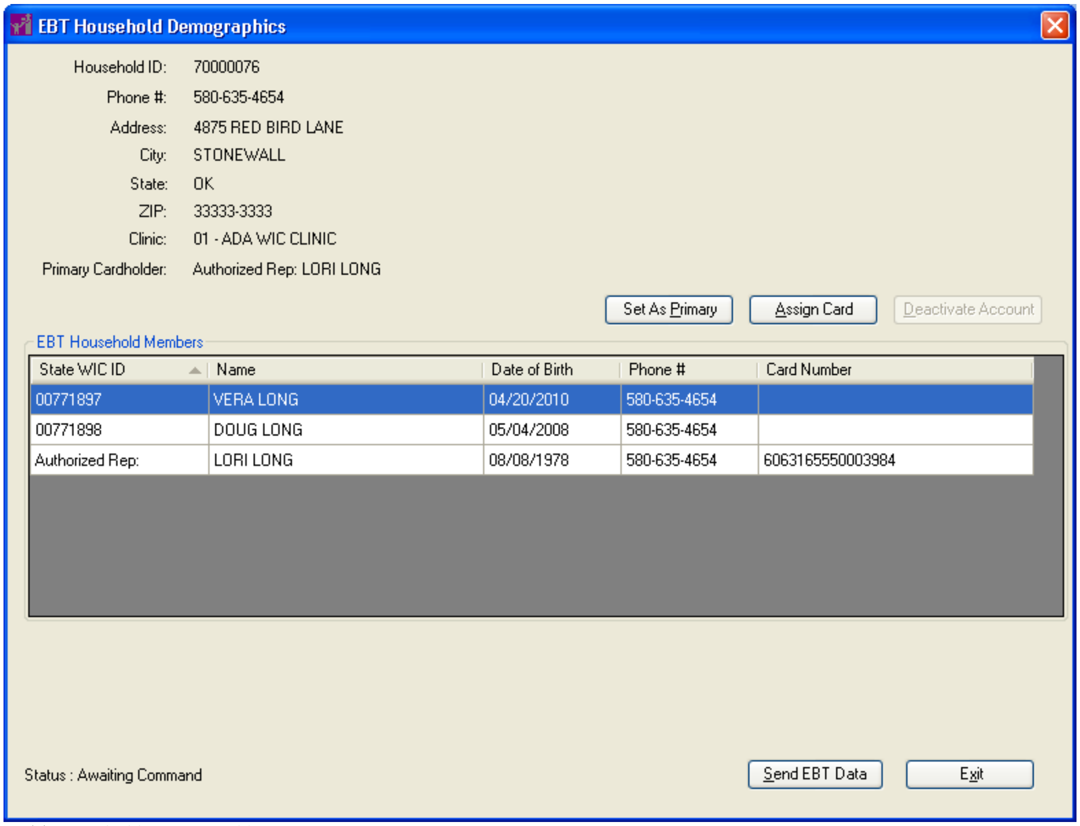


EBT Household Change Guided Script Screen

> **NOTE:** A red check mark is displayed on the screen indicating you have completed the associated step of the process.

STEP 4: REMOVE CARDS

a. Click **Remove Cards**. The **EBT Household Demographics** screen displays.

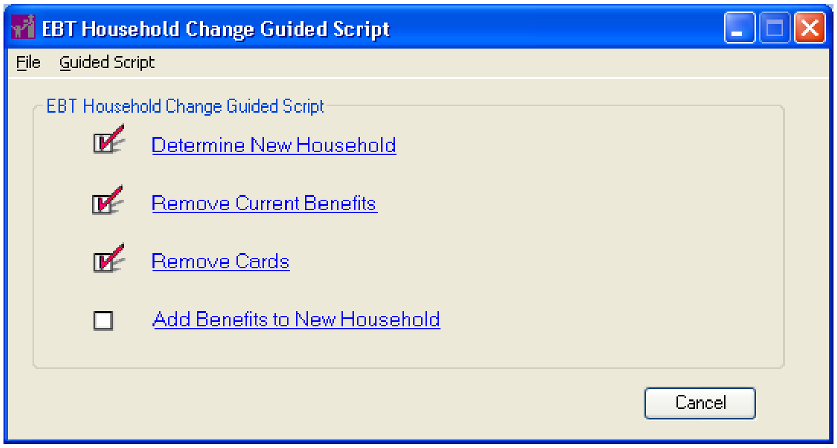


EBT Household Demographics Screen

b. Complete the **EBT Household Demographics** screen, gathering as much information as possible. (For more detail, see the Issuing EBT Benefits – Setting up the EBT Account for a Household scenario or press the F1 key to display system help.)

> **NOTE:** You are given the opportunity to update the **EBT Household Demographics** screen for the former Household if necessary. Pay close attention to the **Status** label. If it indicates 'Awaiting Command', then you are not required to transmit any information to the EBT system for the former Household. Simply click **Exit** to dismiss the **EBT Household Demographics** screen. On the other hand, if the label indicates EBT update needed, update the screen as necessary and click **Send EBT Data** to update the EBT system.

c. Click **Send EBT Data** to transmit and update the information stored in the EBT system. Once the process of updating the EBT system is complete, you are returned to the **EBT Household Change Guided Script** screen.

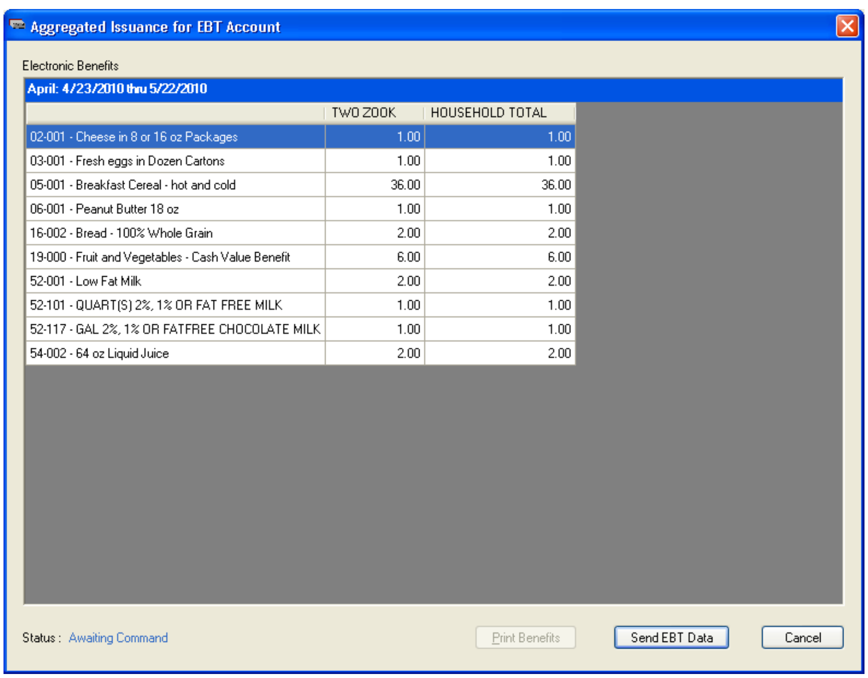


EBT Household Change Guided Script Screen

NOTE: A red check mark is displayed on the screen indicating you have completed the associated step of the process.

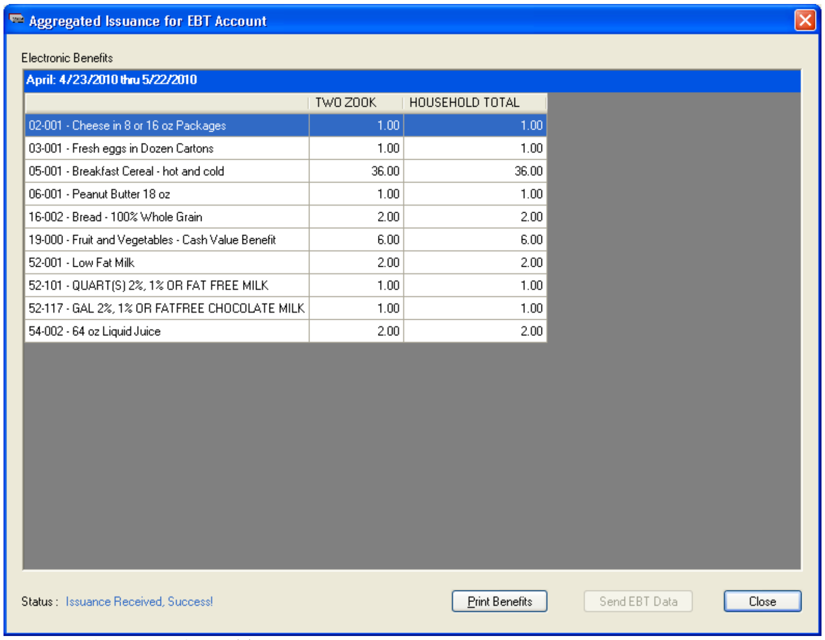
STEP 5: ADD BENEFITS TO THE NEW HOUSEHOLD

a. Click **Add Benefits to New Household** to complete the process of removing benefits from the former Household and adding them to the newly established Household. The **Aggregated Issuance for EBT Account** screen displays.



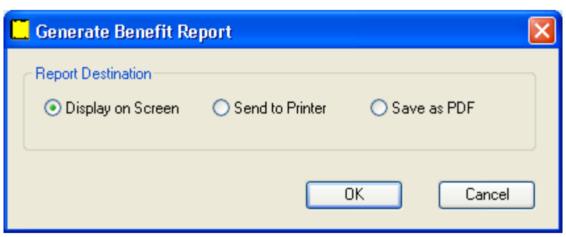
Aggregated Issuance for EBT Account Screen

b. Review the food items listed in the **Electronic Benefits** table. Click **Send EBT Data** to transmit and update the information stored in the EBT system. Once the process of updating the EBT system is complete, you are returned to the **Aggregated Issuance for EBT Account** screen and the **Status** label is updated to indicate the result.



Aggregated Issuance for EBT Account Screen

c. Click **Print Benefits** to view or generate a receipt of food items issued to the Household. The **Generate EBT Receipt Report** screen displays.



Generate Benefit Report Screen

d. Select one of the following **Report Destination** options to specify the destination of the generated receipt and then click **OK**:

- **Display on Screen** – Click this option to display the receipt on the computer's monitor after the receipt is generated.
- **Send to Printer** – Click this option to send the receipt to the selected output printer.
- **Save as PDF** – Click this option to save the receipt as a PDF file after it is generated.

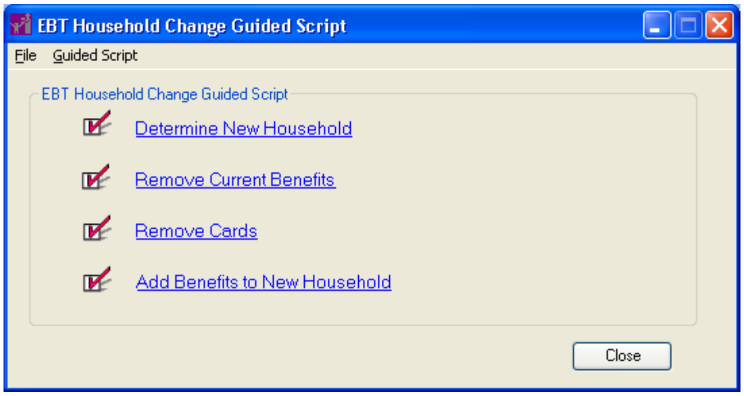
NOTE: If you selected:

- **Display on Screen**: Click **Close** after you are finished viewing the receipt information. You are then returned to the **Aggregated Issuance for EBT Account** screen.
- **Send to Printer**: A receipt of food items issued to the Household is sent to the selected printer and you are returned to **Aggregated Issuance for EBT Account** screen. If you have not set your default printers prior to clicking **OK**, the **Set Default Printers** screen displays prompting you to set default printers. Select a printer for each option and then click **OK**. Now, a receipt is sent to the selected printer and you are returned to

Aggregated Issuance for EBT Account screen.

- **Save as PDF**: Browse to the desired location and click **Save**. A copy of the receipt is saved to the selected location and you are then returned to the **Aggregated Issuance for EBT Account** screen.

e. Click **Close** to dismiss the **Aggregated Issuance for EBT Account** screen. The **EBT Household Change Guided Script** screen displays.



EBT Household Change Guided Script Screen

NOTE: A red check mark is displayed on the screen indicating you have completed the associated step of the process.

f. Click **Close** to dismiss the **EBT Household Change Guided Script** screen. You are returned to the Participant Folder.

NOTE: The process of changing the client's Household ID is complete.

STEP 6: UPDATE THE AUTHORIZED REPRESENTATIVE INFORMATION ON THE ADDITIONAL INFO 2 SUB-TAB

a. Select the **Additional Info 2** sub-tab, located on the right side of the **Demographics** tab. The **Additional Info 2** tab displays.

b. Complete or update the **Authorized Representative Name, Alternate Representative/Proxy 1 Name,** and the **Alternate Representative/Proxy 2 Name** group box options.

c. On the **Benefit Management** menu, located on the menu bar at the top of the **Participant Folder**, click **EBT Household Demographics** update the EBT system. The **EBT Household Demographics** screen displays.

NOTE: If you added new information to the **Additional Info 2** sub-tab, the system prompts you to save the new information when you select the **EBT Household Demographics** menu option. If you entered new information, click **Yes** to save your changes.

Once **Yes** is clicked, the **EBT Household Demographics** screen displays unless any of the required fields are missing information on the **Demographics** screen**, Additional Info 1** sub-tab, or the **Additional Info 2** sub-tab. In this case, a system message displays prompting you to complete the required fields. Click **OK** to dismiss the system message and then complete the required information. The fields requiring information are outlined in orange. Once you have finished updating the required information, select the **EBT Household Demographics** menu option once more. The system will again prompt you to save any new information. Click **Yes** to save your changes and now the **EBT Household Demographics** screen displays.

d. Complete the **EBT Household Demographics** screen, gathering as much information as possible. (For more detail, see the Issuing EBT Benefits - Setting up an EBT Account for a Household scenario or press the F1 key to display system help.)

e. Once you have finished updating Authorized Rep information, designated the Primary Card Holder, and assigned EBT cards to the Household, click **Send EBT Data** to transmit and update the information in the EBT system.

f. Once the process of updating EBT information is complete, a confirmation screen displays.

g. Click **OK** to dismiss the confirmation screen. You may continue working with the participant as necessary.

Changing a Client's Household ID Number to that of an Existing Household

Scenario Set-up: You are interested in changing the Household ID number associated to a client record to that of an existing Household ID number. This task may be necessary at times to correct data entry errors or to merge clients back into an existing household after foster care placement.

The process includes the following system tasks:

- Completing the **EBT Household Change Guided Script** process
  - Opening the Participant Folder and beginning the Change Household ID process
  - Determining the existing household
  - Removing current benefits
  - Removing cards
  - Adding Benefits to New Household

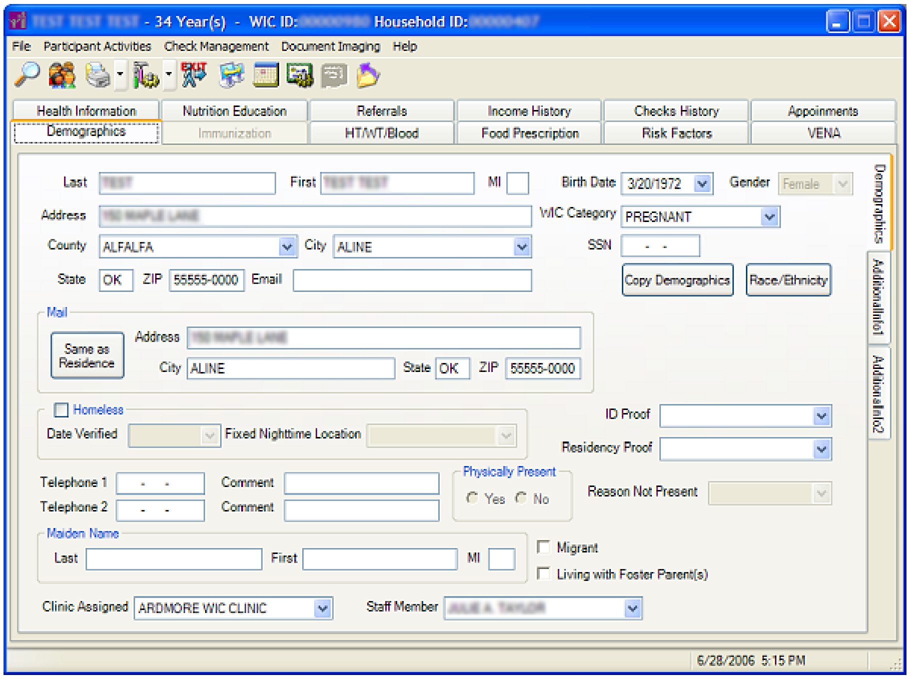
NOTE: Access to the system is managed by local and/or State Office administration. Consult the leadership in your organization if you have questions concerning your level of system access.

NOTE: Press the **F1** key at any time to access help for the current application screen. Each screen's help topic explains the screen's function and describes its content.

Complete the Following Steps to Change a Client's Household ID Number to That of an Existing Household:

STEP 1: OPEN THE PARTICIPANT'S FOLDER AND SELECT CHANGE HOUSEHOLD ID ON THE PARTICIPANT ACTIVITIES MENU

a. Search for the infant's record and open the infant's Participant Folder. (For more detail, see the Searching for a Client scenario or press the F1 key to display system help.)



Participant Folder Screen

b. On the **Participant Activities** menu, located on the menu bar at the top of the screen, click **Change Household** ID. The **EBT Household Change Guided Script** screen displays.

EBT Household Change Guided Script Screen

NOTE: The **EBT Household Change Guided Script** screen "guides" you through a series of screens (or steps) in order to complete the process of changing a Household ID number. Begin by clicking the **Determine New Household** guided script option. After each step in the process is complete, a red check mark displays in the check box next to the completed link.

> **NOTE:** Click **Cancel** to cancel the process at any time and to return to the Participant Folder. However, once the process is started the Participant Folder is 'locked' and no changes can be made until the Change Household ID process is complete.

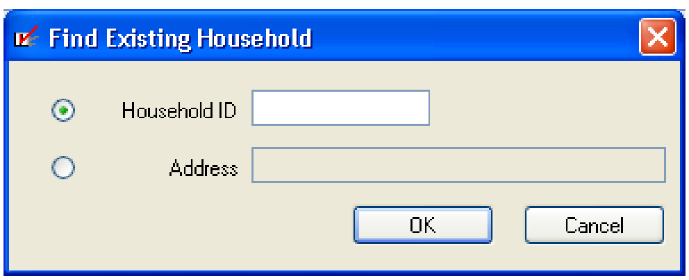
STEP 2: DETERMINE THE EXISTING HOUSEHOLD

a. Click the **Determine New Household** script option. The **Change Household ID** screen displays.

Change Household ID Screen

> **NOTE:** The client's current Household information is displayed under **Current Household Information**.

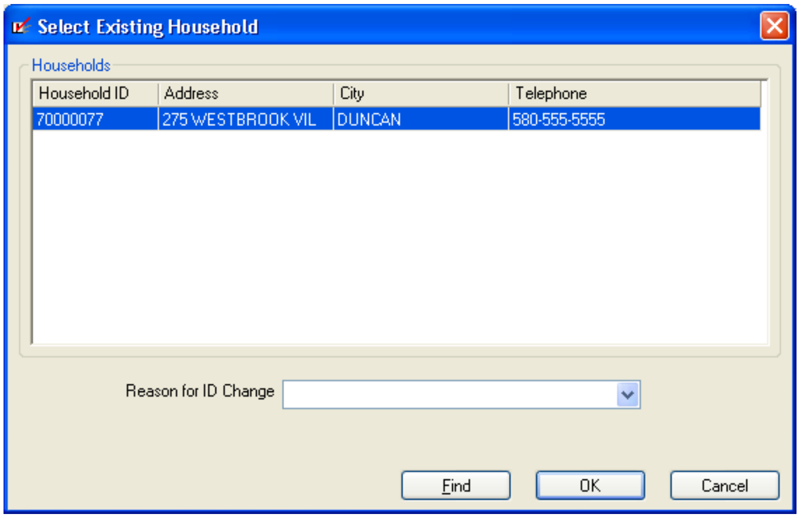
b. Click **Find Existing Household**. The **Find Existing Household** screen displays with the **Household ID** radio button selected.



Find Existing Household Screen

c. Enter a Household ID, then click **OK** to process the screen. The **Select Existing Household** screen displays.

> **NOTE:** Searching by Household ID is recommended because a search by Household ID will result in a maximum of 1 outcome. Searching by Address may result in more than 1 outcome.



Select Existing Household Screen

NOTE: The **Households** table displays the Household(s) matching your search criteria.

d. Select the reason you are changing the client's ID number in **Reason for ID** Change.

e. Click **OK** to process the screen and to return to the **Change Household ID** screen.

NOTE: The client's new Household information is displayed under **Current Household Information**.

f. Click **Close** to dismiss the **Change Household ID** screen. The **EBT Household Change Guided Script** screen displays.

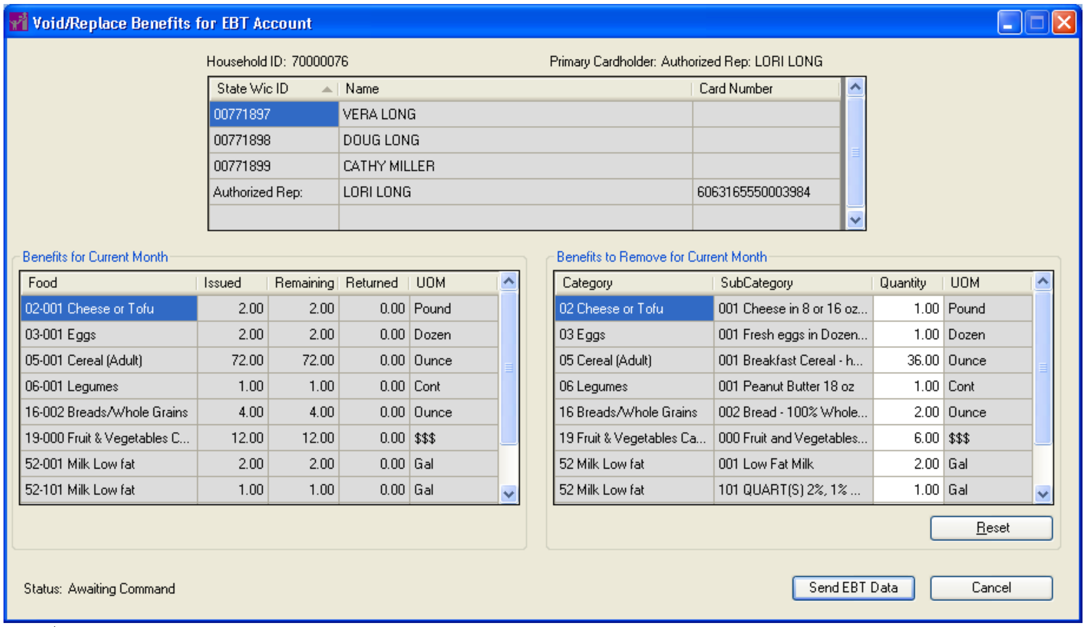
EBT Household Change Guided Script Screen

NOTE: A red check mark is displayed on the screen indicating you have completed the associated step of the process.

STEP 3: REMOVE THE CURRENT BENEFITS

a. Click the **Remove Current Benefit** script option. The **Remove Current Benefits** screen displays.

b. Click **Remove Current Benefits** to move the client's benefits, currently associated to the former Household, into the newly selected Household. The **Void/Replace Benefits for EBT Account** screen displays.



Void/Replace Benefits for EBT Account Screen

NOTE: The former Household's information is displayed near the top of the screen. Issuance information associated to the former Household for the current month is displayed in the **Benefits for Current Month** group box.

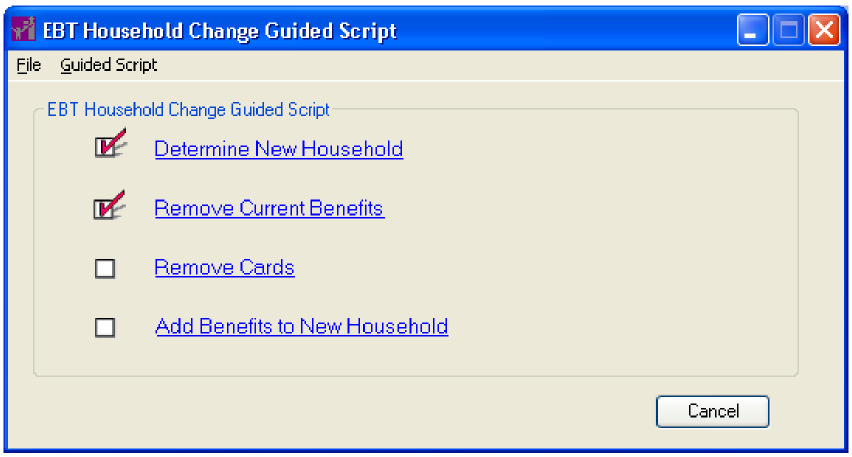
NOTE: Only benefits items that are eligible to be removed are displayed in the **Benefits to Remove for Current Month** group box. Certain benefit items issued to the former Household may not be removed and associated to the newly established Household. For example, assume a Household that included an infant was issued eggs. Then, assume the infant was removed from the Household and a new Household was established for the infant. It would be inappropriate to move eggs into the Household associated to the infant since infants are not permitted to receive eggs per federal WIC guidelines.

NOTE: The amount initially displayed in the **Quantity** column of the **Benefits to Remove for Current Month** group box is determined by dividing the amount remaining for each benefit item by the number of participants issued benefits in like Categories and Subcategories during the benefit period and rounded down. For example, assume 3 Household members were issued Whole milk and 13 gallons of milk remained in the EBT system. If 1 member of the Household were moved into a new Household, the initial amount displayed in the **Quantity** column would be 4 (13/3 = 4 with 1 remaining). The participant being removed from the Household receives an equal portion of each benefit item minus any remainders.

c. In the **Quantity** column of the **Benefits to Remove for Current Month** group box, enter or select the amount of items to remove from the former Household and to associate to the newly selected Household.

> **NOTE:** Click **Reset** to return the amounts displayed in the **Quantity** column to their initial values.

d. Click **Send EBT Data** to transmit and update the information stored in the EBT system. Once the process of updating the EBT system is complete, you are returned to the **EBT Household Change Guided Script** screen.

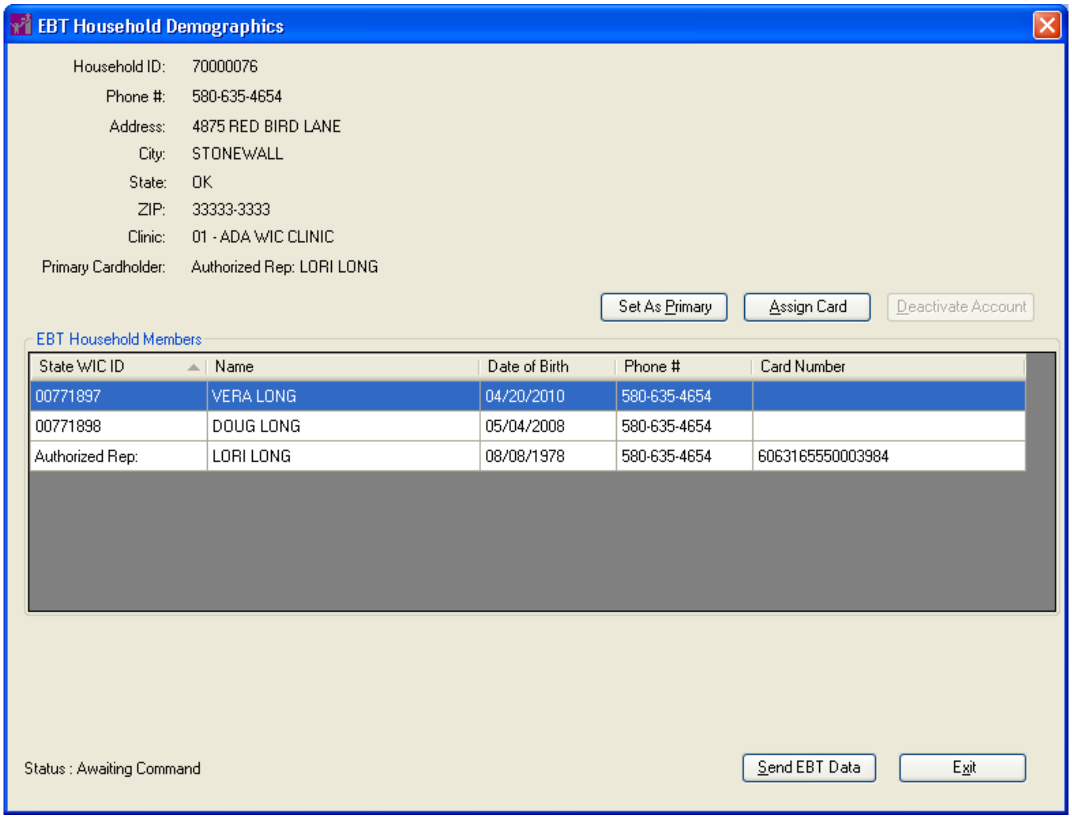


EBT Household Change Guided Script Screen

> **NOTE:** A red check mark is displayed on the screen indicating you have completed the associated step of the process.

STEP 4: REMOVE CARDS

a. Click **Remove Cards**. The **EBT Household Demographics** screen displays.

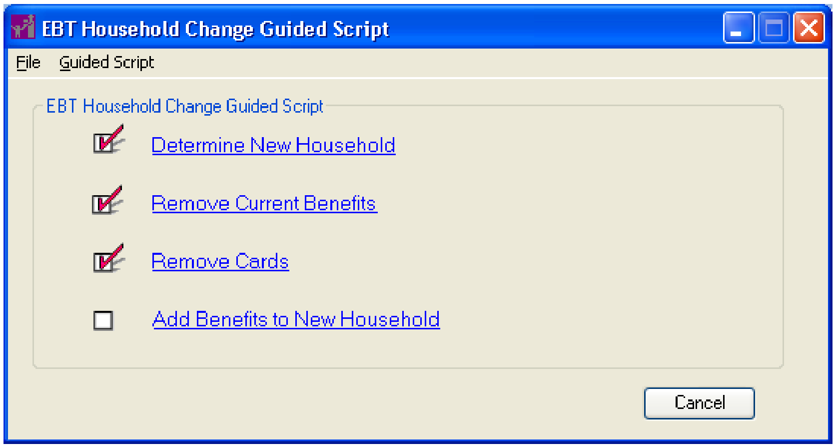


EBT Household Demographics Screen

b. Complete the **EBT Household Demographics** screen, gathering as much information as possible. (For more detail, see the Issuing EBT Benefits – Setting up the EBT Account for a Household scenario or press the F1 key to display system help.)

> **NOTE:** You are given the opportunity to update the **EBT Household Demographics** screen for the former Household if necessary. Pay close attention to the **Status** label. If it indicates 'Awaiting Command', then you are not required to transmit any information to the EBT system for the former Household. Simply click **Exit** to dismiss the **EBT Household Demographics** screen. On the other hand, if the label indicates EBT update needed, update the screen as necessary and click **Send EBT Data** to update the EBT system.

c. Click **Send EBT Data** to transmit and update the information stored in the EBT system. Once the process of updating the EBT system is complete, you are returned to the **EBT Household Change Guided Script** screen.

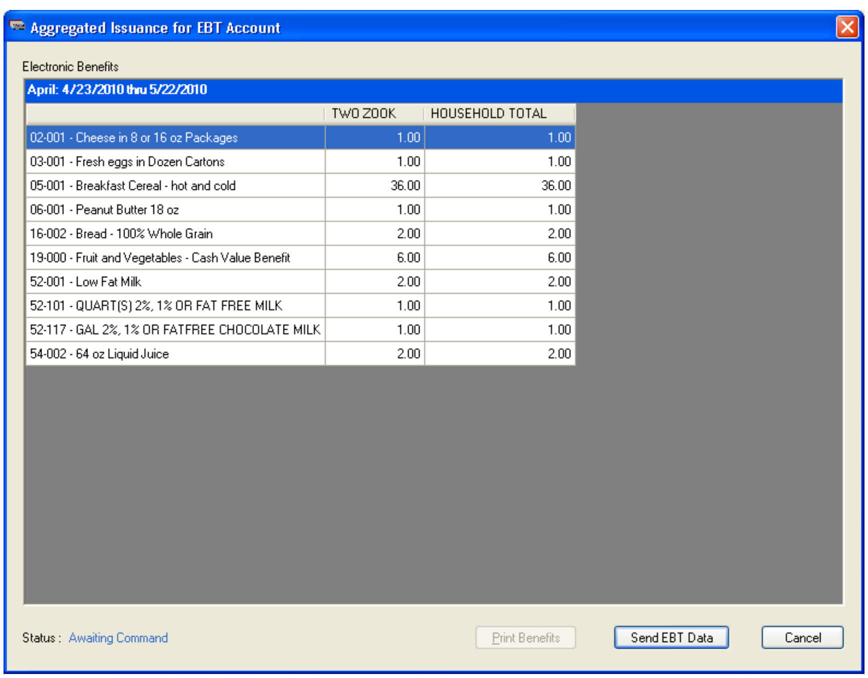


EBT Household Change Guided Script Screen

NOTE: A red check mark is displayed on the screen indicating you have completed the associated step of the process.

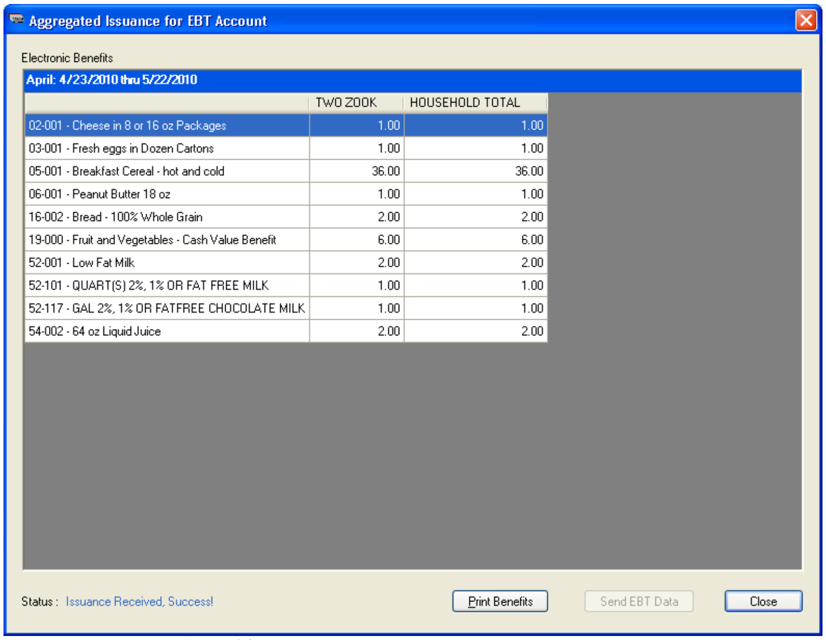
STEP 5: ADD BENEFITS TO THE NEW HOUSEHOLD

a. Click **Add Benefits to New Household** to complete the process of removing benefits from the former Household to the newly established Household. The **Aggregated Issuance for EBT Account** screen displays.



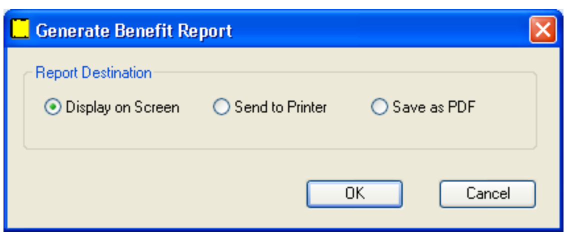
Aggregated Issuance for EBT Account Screen

b. Review the food items listed in the **Electronic Benefits** table. Click **Send EBT Data** to transmit and update the information stored in the EBT system. Once the process of updating the EBT system is complete, you are returned to the **Aggregated Issuance for EBT Account** screen and the **Status** label is updated to indicate the result.



Aggregated Issuance for EBT Account Screen

c. Click **Print Benefits** to view or generate a receipt of food items issued to the Household. The **Generate EBT Receipt Report** screen displays.



Generate Benefit Report Screen

d. Select one of the following **Report Destination** options to specify the destination of the generated receipt and then click **OK**:

- **Display on Screen** – Click this option to display the receipt on the computer's monitor after the receipt is generated.
- **Send to Printer** – Click this option to send the receipt to the selected output printer.
- **Save as PDF** – Click this option to save the receipt as a PDF file after it is generated.

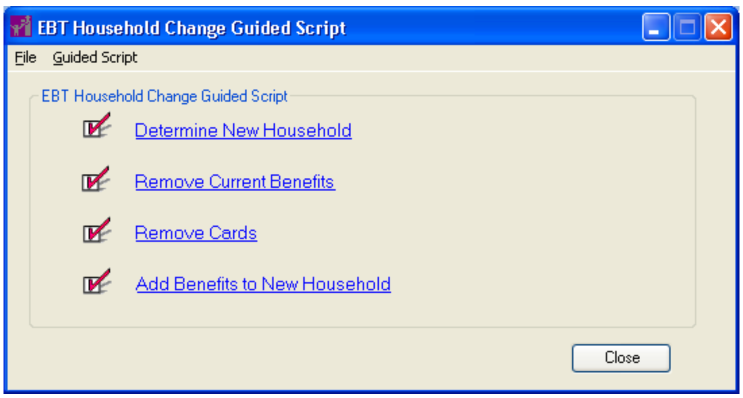
NOTE: If you selected:

- **Display on Screen**: Click **Close** after you are finished viewing the receipt information. You are then returned to the **Aggregated Issuance for EBT Account** screen.
- **Send to Printer**: A receipt of food items issued to the Household is sent to the selected printer and you are returned to **Aggregated Issuance for EBT Account** screen. If you have not set your default printers prior to clicking **OK**, the **Set Default Printers** screen displays prompting you to set default printers. Select a printer for each option and then click **OK**. Now, a receipt is sent to the selected printer and you are returned to

Aggregated Issuance for EBT Account screen.

- **Save as PDF**: Browse to the desired location and click **Save**. A copy of the receipt is saved to the selected location and you are then returned to the **Aggregated Issuance for EBT Account** screen.

e. Click **Close** to dismiss the **Aggregated Issuance for EBT Account** screen. The **EBT Household Change Guided Script** screen displays.



EBT Household Change Guided Script Screen

NOTE: A red check mark is displayed on the screen indicating you have completed the associated step of the process.

f. Click **Close** to dismiss the **EBT Household Change Guided Script** screen. You are returned to the Participant Folder and may continue working with the participant as necessary.

NOTE: The process of changing the client's Household ID is complete.

Working with the On-site Group within an EBT Clinic

Scenario Set-up: A group education class was conducted by you or another staff member within the clinic and several Households attended the class session. You are now interested in issuing benefits to each Household using the **Work With On-site Group** screen.

In this case, assume two Households consisting of 2 members each attended the class session.

The process includes the following system tasks:

- Completing the **Work With On-site Group** process

NOTE: Prior to attempting to issue benefits, ensure that an EBT account has been setup in the EBT system for each Household. (For more detail, see the Issuing EBT Benefits – Setting up the EBT Account for a Household scenario or press the F1 key to display system help.)

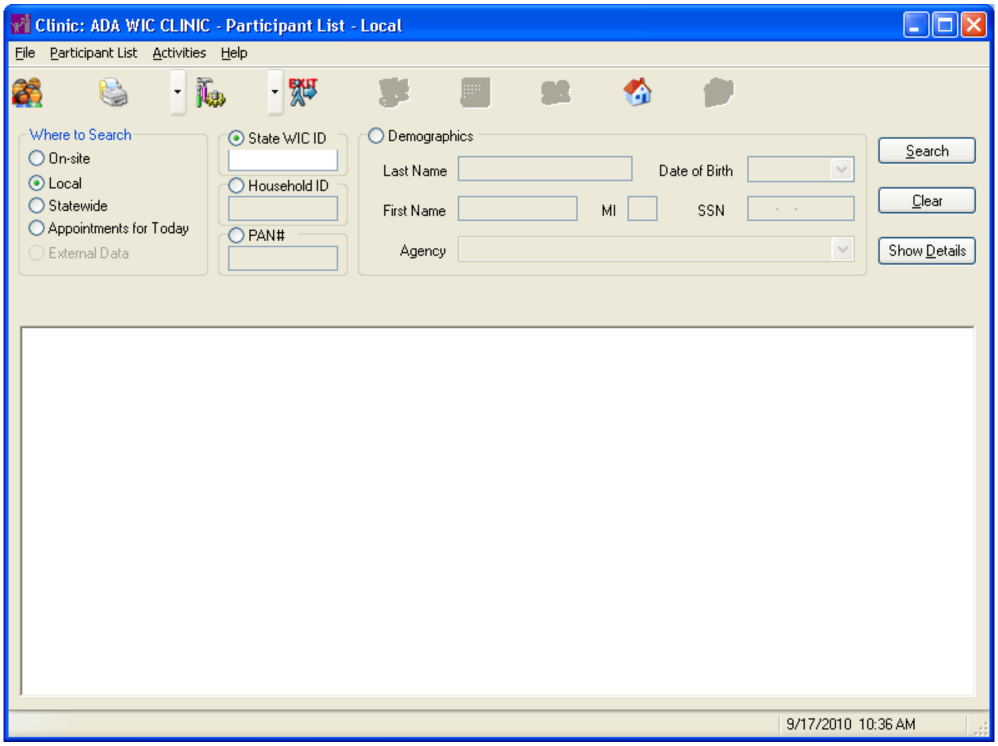
NOTE: Access to the system is managed by local and/or State Office administration. Consult the leadership in your organization if you have questions concerning your level of system access.

NOTE: Press the **F1** key at any time to access help for the current application screen. Each screen's help topic explains the screen's function and describes its content.

Complete the Following Steps to Work With the On-site Group:

STEP 1: COMPLETE THE WORK WITH ON-SITE GROUP PROCESS

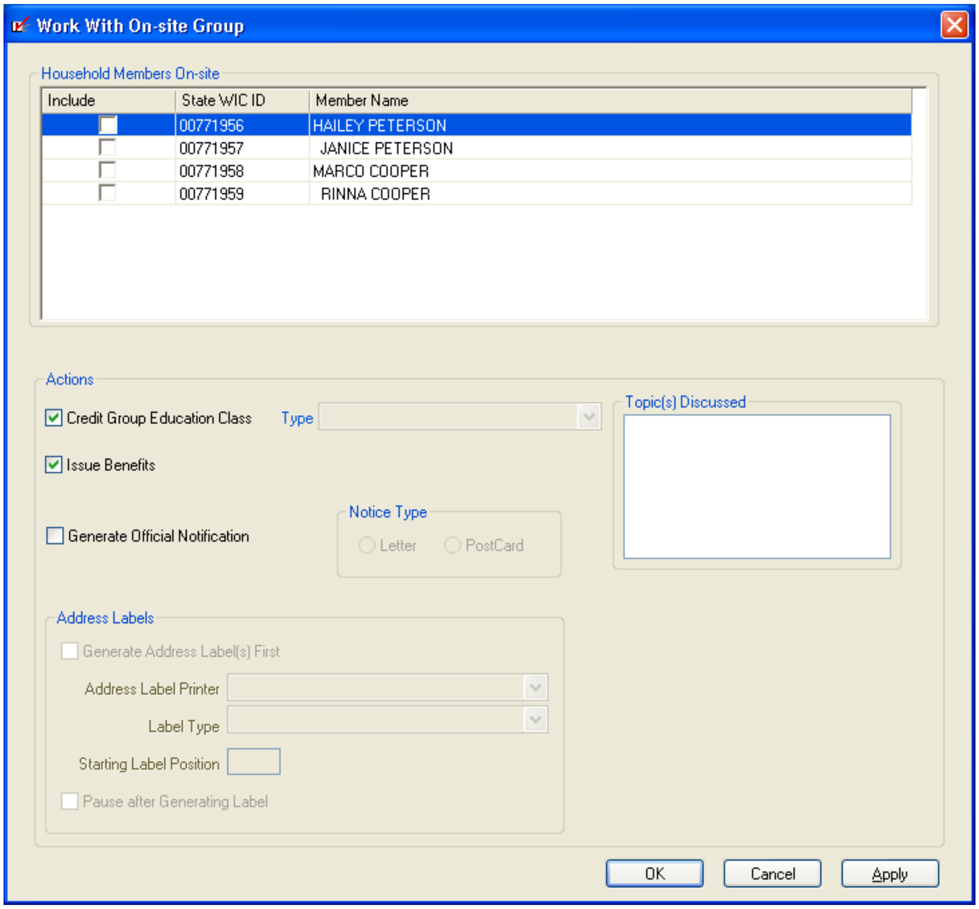
a. Display the **Participant List** screen.



Participant List Screen

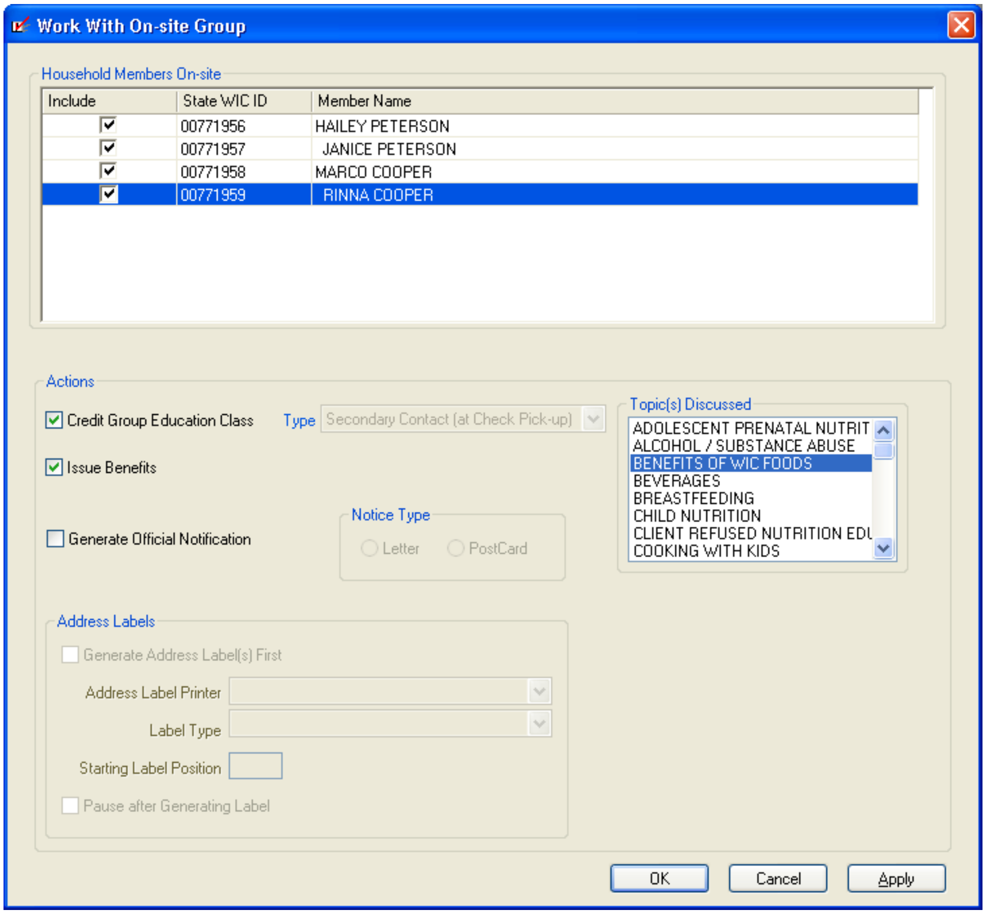
> **NOTE:** The **Participant List** screen displays upon the completion of the Login process.

b. On the **Activities** menu, located on the menu bar at the top of the **Participant List** screen, click **Work With On-site Group** to issue benefits and/or credit group education to participants having been marked on-site. The **Work With On-site Group** screen displays.



Work With On-site Group Screen

c. Select one or more check boxes under the **Include** column of the **Household Members On-site** table. The table is refreshed and displays the selected check boxes.



Work With On-site Group Screen

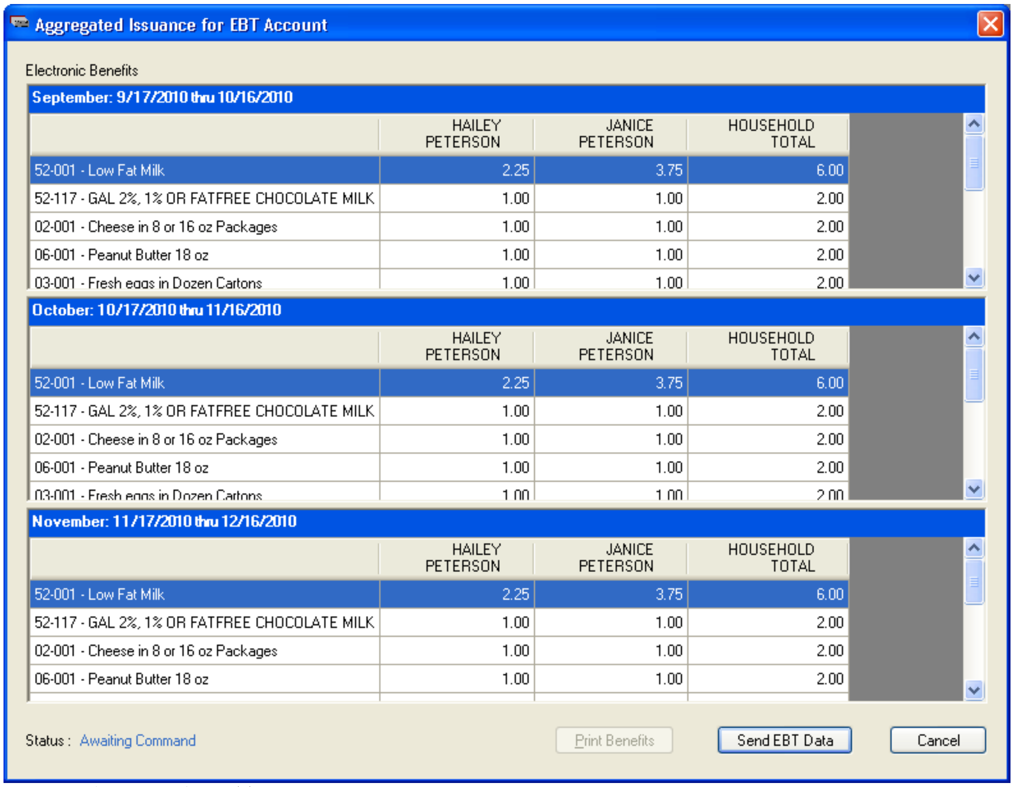
d. Select one or more group education topics within the **Topic(s) Discussed** list box.

> **NOTE:** If you do not intend to credit the selected participants as receiving group education, simply clear the **Credit Group Education Class** check box. Clearing this check box will clear the **Topic(s) Discussed** list box as well.

e. Click **OK** to process the **Work With On-site Group** screen and to issue benefits and/or credit the selected participants as receiving group education. The **Aggregated Issuance for EBT Account** screen displays.

> **NOTE:** The **Issue Benefits** check box is marked by default when the **Work With On-site Group** screen displays.

> **NOTE:** Clicking **Apply** will process the screen as well and enable you to issue benefits and/or credit the selected participants as receiving group education too. The difference between **Apply** and **OK** is that when **Apply** is clicked, the system will process your selections and return you to the **Work With On-site Group** screen. On the other hand, the system will process your selections and return you to the **Participant List** screen when **OK** is clicked. Click **Apply** instead of **OK** when you want to apply separate actions to two different subsets of participants within the **Household Members On-site** table.



Aggregated Issuance for EBT Account Screen

NOTE: The system displays the selected Households in an assembly-like fashion. The order the Households are displayed is determined chronologically by the time in which they were marked on-site. (For example, a Household marked on-site at 9 a.m. will be displayed before a Household marked on-site at 9:10 a.m.)

NOTE: Under **Household TOTAL**, food items for the entire Household are aggregated (or totaled) by category and sub-category and displayed by benefit period. For example, assume 2 members of a Household are issued the same type of milk. One member receives 2.25 gallons of milk and the other member receives 3.75 gallons of milk. In this case, 6 gallons of milk (2.25+3.75=6) displays for each benefit period.

NOTE: The **Print Benefits** button is disabled (or turned off) until **Send EBT Data** is clicked. After **Send EBT Data** is clicked, the **Print Benefits** button is enabled (or turned on).

f. Click **Send EBT Data** to issue Household benefits to the currently displayed Household. You are returned to the **Aggregated Issuance for EBT Account** screen and the **Status** label is updated.

NOTE: Clicking **Cancel** will skip the benefit issuance process for the currently displayed Household. If there are Households still needing to receive benefits, the system will display the **Aggregated Issuance for EBT Account** screen for the next Household. If no remaining Households are due to receive benefits, the system will display the **Event Log** screen which summarizes the activities that occurred during the **Work With On-site Group** process.

NOTE: Once the EBT data is sent and the EBT system is updated, the **Print Benefits** button is enabled (or turned on).

g. Click **Print Benefits** to view or generate a receipt of food items issued to the Household. The **Generate EBT Receipt Report** screen displays.

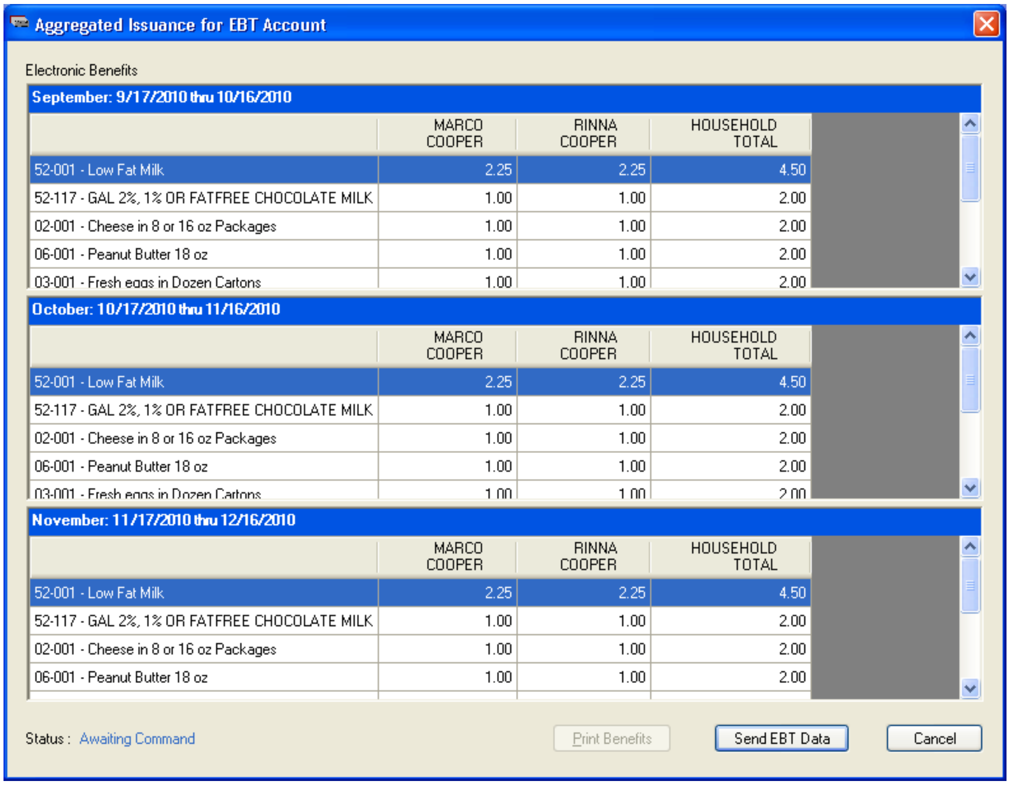
h. Select one of the following **Report Destination** options to specify the destination of the generated receipt and then click **OK**:

- **Display on Screen** – Click this option to display the receipt on the computer's monitor after the receipt is generated.
- **Send to Printer** – Click this option to send the receipt to the selected output printer.
- **Save as PDF** – Click this option to save the receipt as a PDF file after it is generated.

NOTE: If you selected:

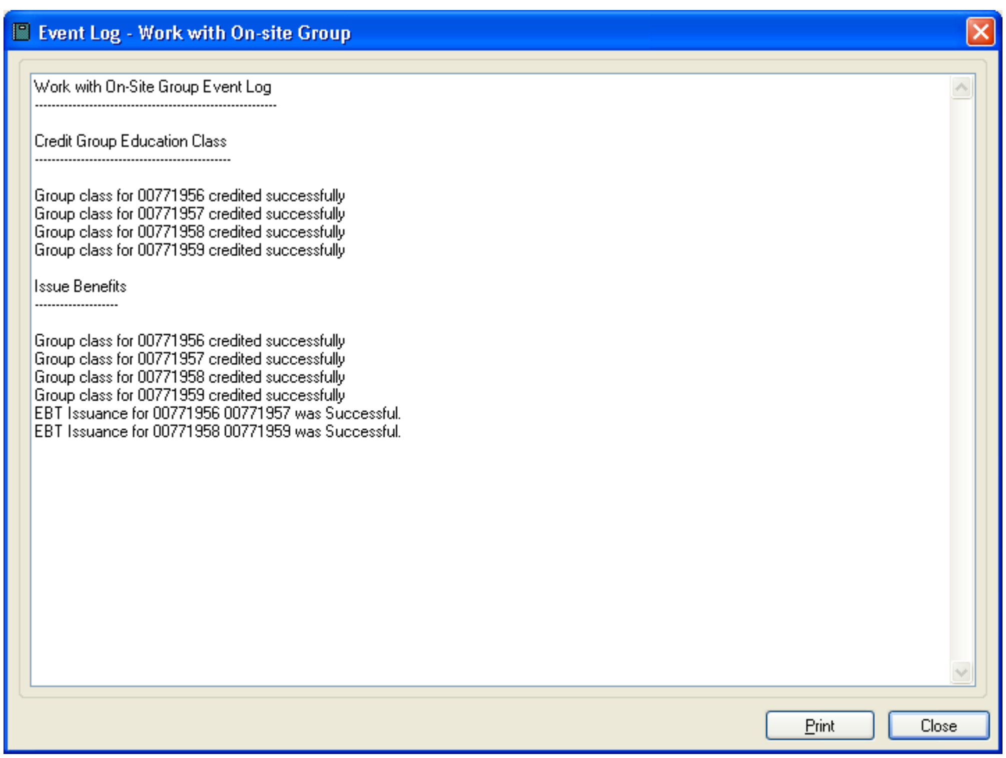
- **Display on Screen**: Click **Close** after you are finished viewing the receipt information. You are then returned to the **Aggregated Issuance for EBT Account** screen.
- **Send to Printer**: A receipt of food items issued to the Household is sent to the selected printer and you are returned to **Aggregated Issuance for EBT Account** screen. If you have not set your default printers prior to clicking **OK**, the **Set Default Printers** screen displays prompting you to set default printers. Select a printer for each option and then click **OK**. Now, a receipt is sent to the selected printer and you are returned to **Aggregated Issuance for EBT Account** screen.
- **Save as PDF**: Browse to the desired location and click **Save**. A copy of the receipt is saved to the selected location and you are then returned to the **Aggregated Issuance for EBT Account** screen.

i. Click **Close** to dismiss the **Aggregated Issuance for EBT Account** screen. You are returned to the **Aggregated Issuance for EBT Account** screen and the system displays the benefit totals for the next Household.



Aggregated Issuance for EBT Account Screen

j. Continue the process of sending EBT data and printing a receipt for each remaining Household. Once you have attended to all selected Households, the **Event Log** screen displays.



Event Log – Work with On-site Group Screen

NOTE: The **Event Log** screen displays a summary of activities that occurred during the **Work With On-site Group** process.

k. Click **Close** to dismiss the **Event Log** screen. The **Participant List** screen displays.

NOTE: If you began the benefit issuance process by clicking **Apply**, you are returned to the **Work With On-site Group** screen. You may continue working with the Households listed within the **Household Members On-site** table as necessary.