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SPIRIT WIC System

EBT Reference Database Utility  
Reference Guide



SPIRIT WIC SYSTEM

# **EBT Reference Database Utility Reference Guide**

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# Table of Contents

<b>Reference Guide</b>	<b>1</b>
Setting the Food Delivery System of a Clinic Site as EBT .....	1
Importing the National UPC File .....	5
Associating EBT Categories and Subcategories to Food Distribution Items.....	9
Exporting the National UPC File .....	13
Sending the National UPC File to the EBT System.....	17
Managing the List of Staff Members Selected to Receive EBT Notification Emails .....	21
Managing EBT Categories and Subcategories .....	23



# Reference Guide

## Setting the Food Delivery System of a Clinic Site as EBT

**Scenario Set-up:** You want to designate a clinic site in your agency or state as having an electronic benefits transfer (EBT) food delivery system. You will use the **Agency/Clinic Maintenance** screen to set the food delivery system of the clinic site.

Setting a clinic site as having a food delivery system of EBT is the first task in a series of tasks to begin the overall EBT setup process. By completing this task, the system enables (or activates) additional EBT functionality that makes it possible for you to continue the initial EBT setup process.

The process includes the following system tasks:

- Displaying the **Agency/Clinic** screen
- Selecting and editing a clinic site in the tree list
- Returning to the **Reference Utility** screen



**NOTE:** The EBT setup process assumes that a variety of system setup tasks have already been completed. For example, before you can set the delivery system of a clinic site as EBT, an agency and its' clinic sites would have already needed to be established within the system. Similarly, the EBT setup process explains the task of associating EBT categories and subcategories to food distribution items. This task assumes that food distribution items have been defined in the system.



**NOTE:** Once you have completed the task of setting the food delivery system of a clinic site as EBT, the next task in the EBT setup process is to import the national UPC file. (For more detail, see the Importing the National UPC File 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.

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### Complete the Following Steps to Set the Food Delivery System as EBT:

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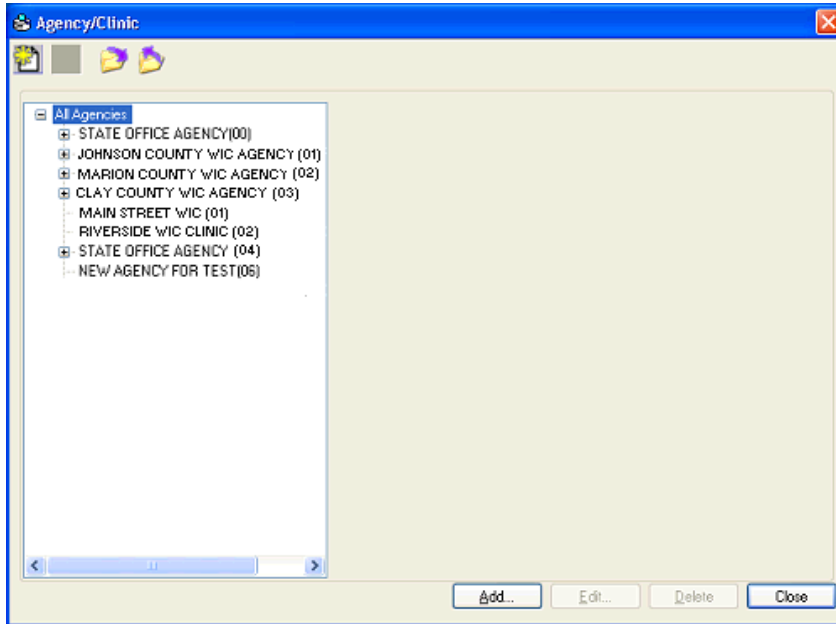
#### STEP 1: DISPLAY THE AGENCY/CLINIC SCREEN

- a. Display the **Reference Utility** screen.



**NOTE:** The **Reference Utility** screen displays upon the completion of the Login process. The **Reference Utility** table displays a list of system functions including a short description for each function.

- b. Double-click **Agency/Clinic** in the **Reference Utility** table. The **Agency/Clinic** screen displays.



Agency/Clinic Screen



**NOTE:** The **Agency/Clinic** tree list displays existing agencies and/or any associated clinic sites. To view existing agencies and clinic sites, click **+** and **-** to expand and collapse items within the tree list.

**STEP 2: SELECT AND EDIT A CLINIC SITE**

- a. Select a clinic site in the tree list and click **Edit** to edit the selected clinic site’s information. The **Edit Clinic** screen displays.

Edit Clinic Screen

- b. Select **EBT** as the **Food Delivery System**.



**NOTE:** Selecting **EBT** as the **Food Delivery System** enables (or activates) all EBT functionality for the selected clinic site and a variety of administrative EBT functions located in the Reference Utility and Vendor modules.

- c. Click **OK** to process the screen and to return to the **Agency/Clinic** screen.
- d. Repeat step 2 as necessary to set additional clinic sites to EBT, then proceed to the next step.

**STEP 3: RETURN TO THE REFERENCE UTILITY SCREEN.**

- a. Click **Close** to dismiss the **Agency/Clinic** screen and to return to the **Reference Utility** screen.
- b. Right-click on the Session Manager icon located in the task bar, then select Reset Local Reference Data. A status bar displays and indicates the progress of the action.



**NOTE:** It is recommended that you reset local reference data after updating any reference table. Upon completion of the action, the status bar is dismissed and you may continue working.

- c. Upon completion of the Reset Local Reference Data process, you are returned to the **Reference Utility** screen. You can begin managing additional **Reference Utility** functions.



# Importing the National UPC File

**Scenario Set-up:** You are interested in importing the federally maintained, National UPC file into the system. You will use the **UPC List** screen to complete the process of importing the file.

The process includes the following system tasks:

- Displaying the **UPC List** screen
- Importing the National UPC file
- Returning to the **Reference Utility** screen



**NOTE:** Prior to importing the National UPC file into the system, you will have needed to access the National UPC web site and saved a copy of the National UPC file locally on an accessible drive.



**NOTE:** Once you have completed the task of importing the national UPC file, the next task in the EBT setup process is to associate EBT categories and subcategories to food distribution items. (For more detail, see the Associating EBT Categories and Subcategories to Food Distribution Items 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.

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## Complete the Following Steps to Import the National UPC File:

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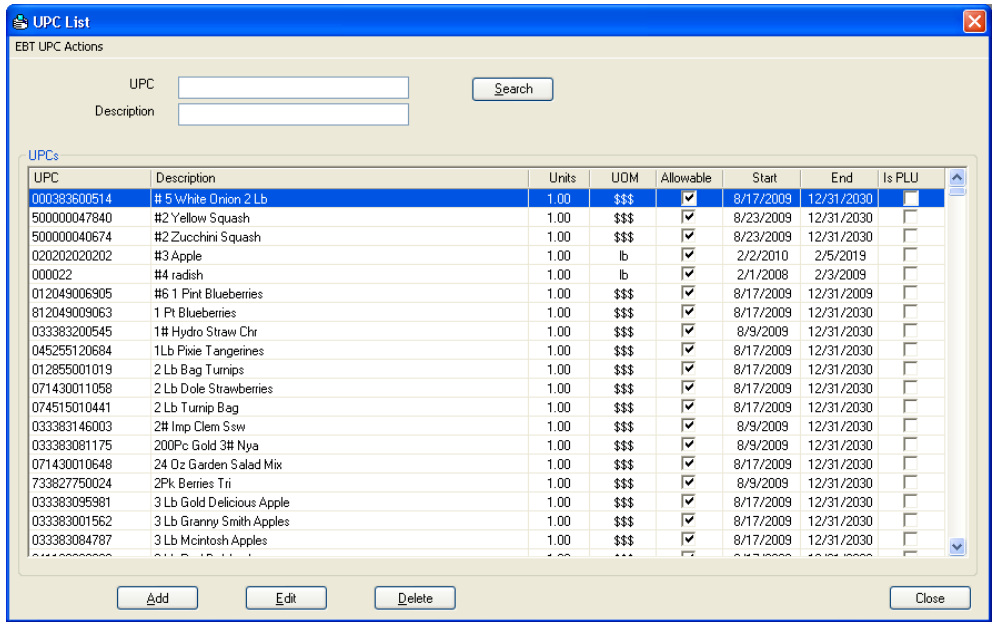
### STEP 1: DISPLAY THE UPC LIST SCREEN

- a. Display the **Reference Utility** screen.



**NOTE:** The **Reference Utility** screen displays upon the completion of the Login process. The **Reference Utility** table displays a list of system functions including a short description for each function.

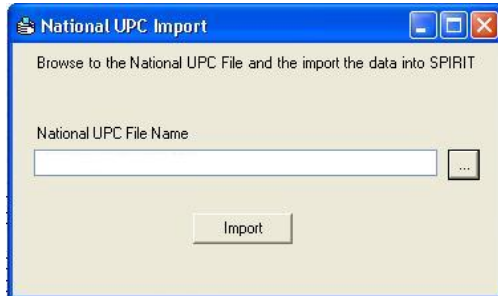
- b. Double-click UPCs in the **Reference Utility** table. The **UPC List** screen displays.



UPC List Screen

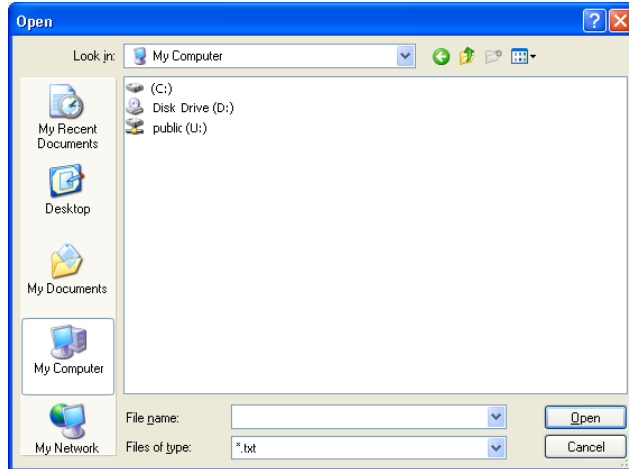
**STEP 2: IMPORT THE NATIONAL UPC FILE**

- a. On the **EBT UPC Actions** menu, located on the menu bar at the top of the **UPC List** screen, click **Import National UPC File** to import a text file version of UPC data. The **National UPC Import** screen displays.



National UPC Import Screen

- b. Click the ellipsis button, located to the right of the National UPC File Name field, to browse to the National UPC file. The **Open** screen displays.

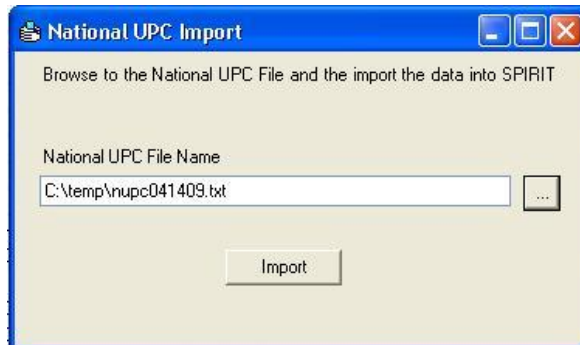


Open Screen



**NOTE:** This step assumes you have accessed the federally maintained, National UPC web site prior to beginning this process and have saved a copy of the UPC file locally on an accessible drive.

- c. Browse to the location you saved the National UPC file, select the file, and then click **Open**. You are returned to the **National UPC Import** screen and the file you selected is listed in the **National UPC File Name** field.



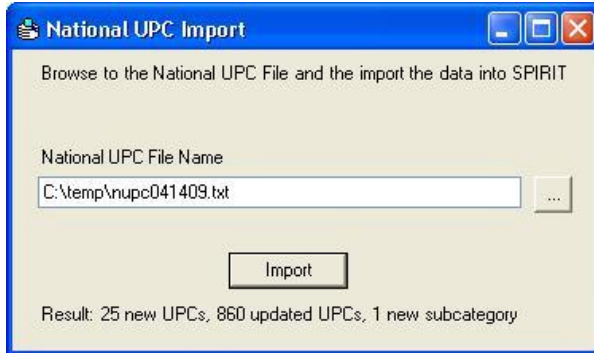
National UPC Import Screen

- d. Click **Import** to initiate the process of importing the file into the system.



**NOTE:** The system verifies that the file is in the correct format. If the format is incorrect, a system message displays indicating the error.

- e. Verify the results of the import process and then dismiss the **National UPC Import** screen to return to the **UPC List** screen.



National UPC Import Screen



**NOTE:** The system reads the National UPC file data twice during the import process and saves the data to 2 system tables. Once the import process is complete, the results of the process are displayed at the bottom of the **National UPC Import** screen.

**STEP 3: RETURN TO THE REFERENCE UTILITY SCREEN**

- a. Click **Close** to dismiss the **UPC List** screen and to return to the **Reference Utility** screen.
- b. Right-click the Session Manager icon located in the task bar, then select Reset Local Reference Data. A status bar displays and indicates the progress of the action.



**NOTE:** It is recommended that you reset local reference data after updating any reference table. Upon completion of the action, the status bar is dismissed and you may continue working.

- c. Upon completion of the Reset Local Reference Data process, you are returned to the **Reference Utility** screen. You can begin managing additional **Reference Utility** functions.

# Associating EBT Categories and Subcategories to Food Distribution Items

**Scenario Set-up:** As part of the initial EBT setup process, it is important to associate EBT Categories and Subcategories to Food Distribution Items. You will use the **Distribution Items** screen to accomplish this task.

The process includes the following system tasks:

- Displaying the **Distribution Item** screen
- Associating EBT Categories and Subcategories to **Food Distribution Items**
- Returning to the **Reference Utility** screen



**NOTE:** Previously, prior to associating Categories and Subcategories to Food Distribution Items, you (or someone else) would have needed to import the National UPC file into the system. (For more detail, see the Importing the National UPC File scenario or press the F1 key to display system help.)



**NOTE:** Once you have completed the task of associating EBT categories and subcategories to food distribution items, the next task in the EBT setup process is to manage the list of staff members selected to receive EBT notification emails. (For more detail, see the Managing the List of Staff Members Selected to Receive EBT Notification Emails 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.

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## Complete the Following Steps to Associate EBT Categories and Subcategories to Food Distribution Items:

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### STEP 1: DISPLAY THE DISTRIBUTION ITEMS SCREEN

- a. Display the **Reference Utility** screen.



**NOTE:** The **Reference Utility** screen displays upon the completion of the Login process. The **Reference Utility** table displays a list of system functions including a short description for each function.

- b. Double-click **Food Distribution Items** in the **Reference Utility** table. The **Distribution Items** screen displays.

Distributio	Description	Base Food C	Active	Category	Subcategory
1078	GOOD START PROTECT PLUS 12 OZ POWDER CAN(S)	FORMULA	<input checked="" type="checkbox"/>	21 - Infant Form	073 - Good Start Protec
1079	GOOD START GENTLE PLUS 12 OZ POWDER CAN(S)	FORMULA	<input checked="" type="checkbox"/>	21 - Infant Form	057 - Good Start Gentle
1080	GOOD START SOY PLUS 12.9 OZ POWDER CAN(S)	FORMULA	<input checked="" type="checkbox"/>		
1081	GOOD START GENTLE PLUS 13 OZ CONCENTRATE C	FORMULA	<input checked="" type="checkbox"/>		
1082	GOOD START GENTLE PLUS 32 OZ READY TO FEED C	FORMULA	<input checked="" type="checkbox"/>		
1083	GOOD START SOY PLUS 13 OZ CONCENTRATE CAN(	FORMULA	<input checked="" type="checkbox"/>		
1084	GOOD START SOY PLUS 32 OZ READY TO FEED CAN(	FORMULA	<input checked="" type="checkbox"/>	02 - Cheese or T	001 - Cheese in 8 or 16
1085	FOR FRESH/FROZEN FRUITS OR VEGETABLES	CASH BENE	<input checked="" type="checkbox"/>	19 - Fruit & Vege	000 - Fruit and Vegetab
1086	SIMILAC SENSITIVE 12.9 OZ POWDER CAN(S)	FORMULA	<input checked="" type="checkbox"/>		
1087	SIMILAC SENSITIVE 32 OZ READY TO FEED	FORMULA	<input checked="" type="checkbox"/>		
1088	SIMILAC SENSITIVE 13 OZ CONCENTRATE CAN(S)	FORMULA	<input checked="" type="checkbox"/>		
1089	SIMILAC ORGANIC 12.9 OZ POWDER CAN(S)	FORMULA	<input checked="" type="checkbox"/>		
1090	SIMILAC ORGANIC 32 OZ READY TO FEED BOTTLE(S)	FORMULA	<input checked="" type="checkbox"/>		
1091	NEOCATE INFANT WITH DHA & ARA 14 OZ CAN(S)	FORMULA	<input checked="" type="checkbox"/>		
1092	NEOCATE ONE + 60 GRAM PACKET(S)	FORMULA	<input checked="" type="checkbox"/>		
1093	16 OZ PKG TOFU	MILK	<input checked="" type="checkbox"/>		
1094	QUART(S) 8TH CONTINENT ORIGINAL SOY MILK	MILK	<input checked="" type="checkbox"/>		
1095	HALF GALLON(S) 8TH CONTINENT ORIGINAL SOY MILK	MILK	<input checked="" type="checkbox"/>		

Distribution Items Screen



**NOTE:** The **Food Distribution Items** table displays active and inactive **Food Distribution Items**. A food distribution item is the description of a food item you see (or read) during (or after) the benefit issuance process. For example, assume a participant is issued 4 gallons of whole milk and is given a receipt listing the food items he or she received. On the receipt, a benefit of “4 Gallons of Whole Milk” is listed. In this case, the phrase “Gallons of Whole Milk” is the food distribution item for the food item named “Whole Milk”. The “4” is simply the quantity of the food item the participant received.

**STEP 2: ASSOCIATING UPC CATEGORIES AND SUBCATEGORIES TO FOOD DISTRIBUTION ITEMS**

- a. Select a row in the food distribution item table, then click **Edit**. The **Food Distribution** Item screen displays.

Food Distribution Item Screen

- b. Select an EBT Category to associate to the selected food distribution item in **EBT Category**.



**NOTE:** The list of EBT categories can be managed through the Category/Subcategory Maintenance function in the Reference Database Utility module. (For more detail, see the Managing EBT Categories and Subcategories scenario or press the F1 key to display system help.)

- c. Select an EBT Subcategory to associate to the selected food distribution item in **EBT Subcategory**.



**NOTE:** When you associate an EBT Subcategory to a Food Distribution Item, the selected EBT Subcategory is removed from the list. Therefore, as you continue the process of associating EBT Categories and Subcategories to Food Distribution Items, the list of Subcategories becomes shorter.



**NOTE:** The list of EBT subcategories can be managed through the Category/Subcategory Maintenance function in the Reference Database Utility module. (For more detail, see the Managing EBT Categories and Subcategories scenario or press the F1 key to display system help.)

- d. Click **OK** to process the screen. You are returned to the **Distribution Items** screen.



**NOTE:** Repeat this step as necessary to associate EBT Categories and Subcategories to Food Distribution Items. When you have finished, proceed to the next step.



**NOTE:** Clear the **Active** check box to disassociate a Food Distribution Item's EBT Category and Subcategory. The system will add the disassociated Subcategory back to the **EBT Subcategory** drop down list.

**STEP 3: RETURN TO THE REFERENCE UTILITY SCREEN.**

- a. Click **Close** to dismiss the **Distribution Items** screen and to return to the **Reference Utility** screen.
- b. Right-click the Session Manager icon located in the task bar, then select Reset Local Reference Data. A status bar displays and indicates the progress of the action.



**NOTE:** It is recommended that you reset local reference data after updating any reference table. Upon completion of the action, the status bar is dismissed and you may continue working.

- c. Upon completion of the Reset Local Reference Data process, you are returned to the **Reference Utility** screen. You can begin managing additional **Reference Utility** functions.

# Exporting the National UPC File

**Scenario Set-up:** You are interested in exporting the federally maintained, National UPC file from the system. You will use the **UPC List** screen to complete the process of exporting the file.

The process includes the following system tasks:

- Displaying the **UPC List** screen
- Exporting the National UPC file
- Returning to the **Reference Utility** screen



**NOTE:** Previously, prior to exporting the National UPC file from the system, you (or someone else) would have needed to import the file into the system. (For more detail, see the Importing the National UPC File 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.

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## Complete the Following Steps to Export the National UPC File:

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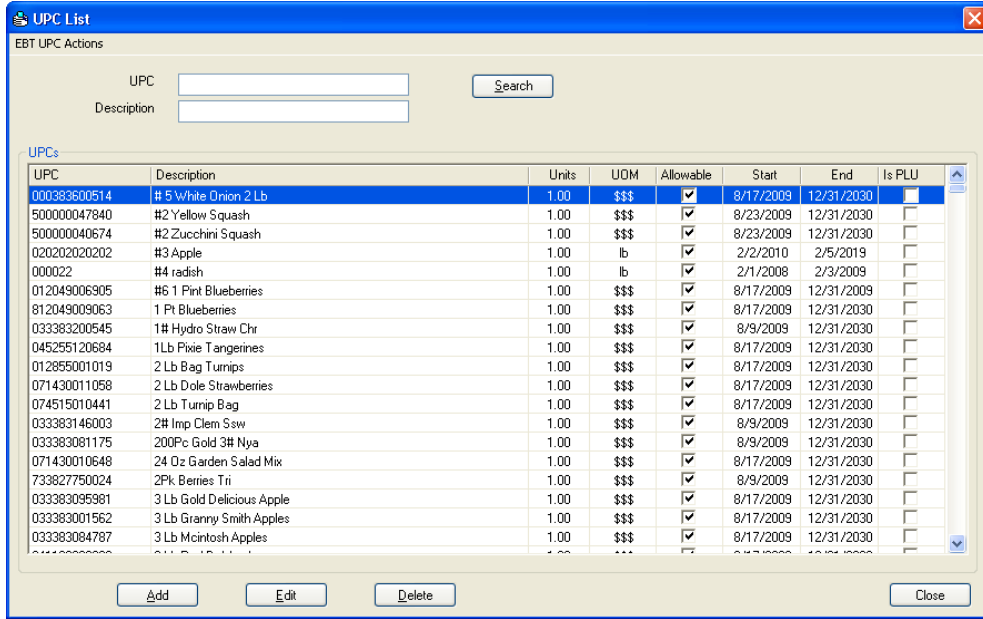
### STEP 1: DISPLAY THE UPC LIST SCREEN

- a. Display the **Reference Utility** screen.



**NOTE:** The **Reference Utility** screen displays upon the completion of the Login process. The **Reference Utility** table displays a list of system functions including a short description for each function.

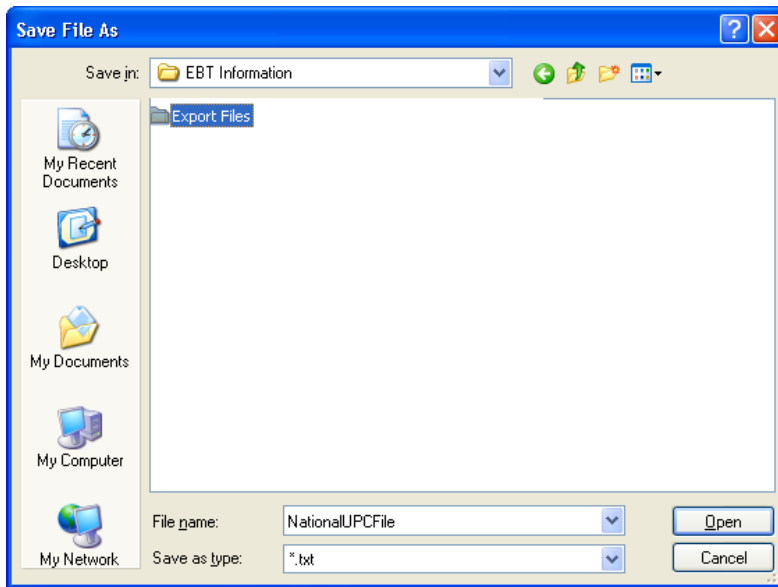
- b. Double-click UPCs in the **Reference Utility** table. The **UPC List** screen displays.



UPC List Screen

**STEP 2: EXPORT THE NATIONAL UPC FILE**

- a. On the **EBT UPC Actions** menu, located on the menu bar at the top of the **UPC List** screen, click **Export National UPC File** to export a text file version of UPC data. The **Save File As** screen displays.



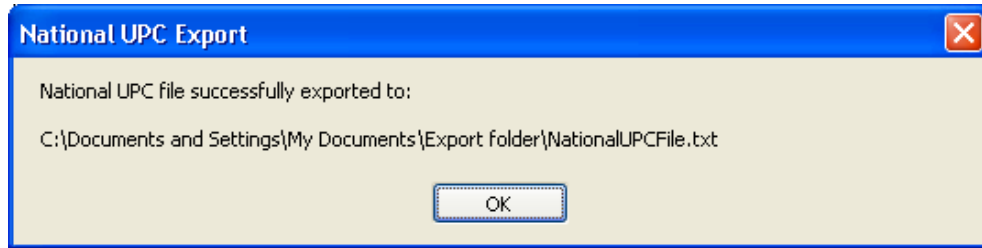
Save File As Screen



**NOTE:** This step assumes, prior to beginning this process, you (or someone else) have imported the National UPC file into the system.

- b. Browse to the desired location to save the National UPC file and then click **Save**. You are returned to the **National UPC Export** screen and the location you selected is listed in the **National UPC File Name** field.

- c. Click **Export** to initiate the process of exporting the file to the location you selected. Once the export process is complete, a system message displays indicating the success of the export process and the file location.



National UPC Export Screen

- d. Verify the results of the export process and note the location of the file. Then click **OK** to dismiss the system message and to return to the **UPC List** screen.

### STEP 3: RETURN TO THE REFERENCE UTILITY SCREEN

- a. Click **Close** to dismiss the **UPC List** screen and to return to the **Reference Utility** screen.



# Sending the National UPC File to the EBT System

**Scenario Set-up:** The system's End of Day (EOD) process automatically transmits the UPC file from the system to the EBT system after business hours at a State-defined time. However, in this case, you are interested in manually transmitting the UPC file from the system to the EBT system during business hours to update the list of UPCs immediately. You will use the **UPC List** screen to complete the process of transmitting the file.

The process includes the following system tasks:

- Displaying the **UPC List** screen
- Sending the National UPC file to the EBT System
- Returning to the **Reference Utility** screen



**NOTE:** Previously, prior to sending the National UPC file from the system to the EBT system, you (or someone else) would have needed to import the file into the system. (For more detail, see the Importing the National UPC File 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.

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## Complete the Following Steps to Send the National UPC File to the EBT System:

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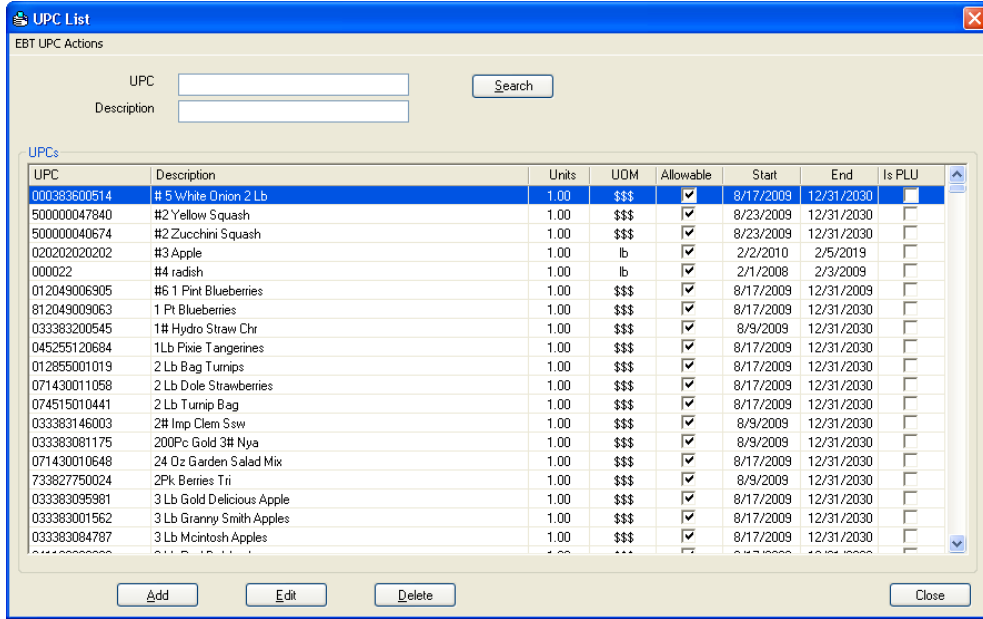
### STEP 1: DISPLAY THE UPC LIST SCREEN

- a. Display the **Reference Utility** screen.



**NOTE:** The **Reference Utility** screen displays upon the completion of the Login process. The **Reference Utility** table displays a list of system functions including a short description for each function.

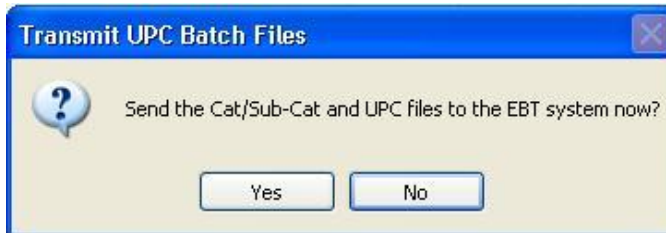
- b. Double-click **UPCs** in the **Reference Utility** table. The **UPC List** screen displays.



UPC List Screen

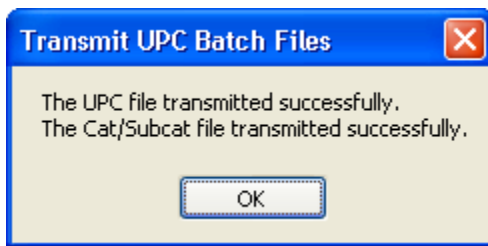
**STEP 2: SEND THE NATIONAL UPC FILE TO THE EBT SYSTEM**

- a. On the **EBT UPC Actions** menu, located on the menu bar at the top of the **UPC List** screen, click **Send UPC File to EBT system** to transmit the file to the EBT system. The **Transmit UPC Batch Files** screen displays.



Transmit UPC Batch Files Screen

- b. Click the **Yes** to begin the process of transmitting the UPC file to the EBT system. Once the transmission is complete, a system message displays indicating the success of the transmission.



Transmit UPC Batch Files Screen



**NOTE:** This step assumes, prior to beginning this process, you (or someone else) have imported the National UPC file into the system.

- c. Verify the results of the transmission, then click **OK** to dismiss the system message and to return to the **UPC List** screen.

**STEP 3: RETURN TO THE REFERENCE UTILITY SCREEN**

- a. Click **Close** to dismiss the **UPC List** screen and to return to the **Reference Utility** screen.



# Managing the List of Staff Members Selected to Receive EBT Notification Emails

**Scenario Set-up:** Prior to going Live with EBT, one or more staff members were selected to receive system generated emails notifying them of the results of the Maximum Allowable Reimbursement (MAR) recalculation process and the reconciliation process. Your State's vendor manager, leadership, or the system contractor (under the direction of a State representative) may have entered the initial list of selected staff into the system. At necessary, you can add or remove staff members from this list. You will use the **EBT Notification** screen to manage the list of staff member names receiving notification emails.

The process includes the following system tasks:

- Displaying the **EBT Notification** screen
- Managing the list of staff member names
- Returning to the **Reference Utility** screen



**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.

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## Complete the Following Steps to Manage the List of Staff Members Selected to Receive EBT Notification Emails:

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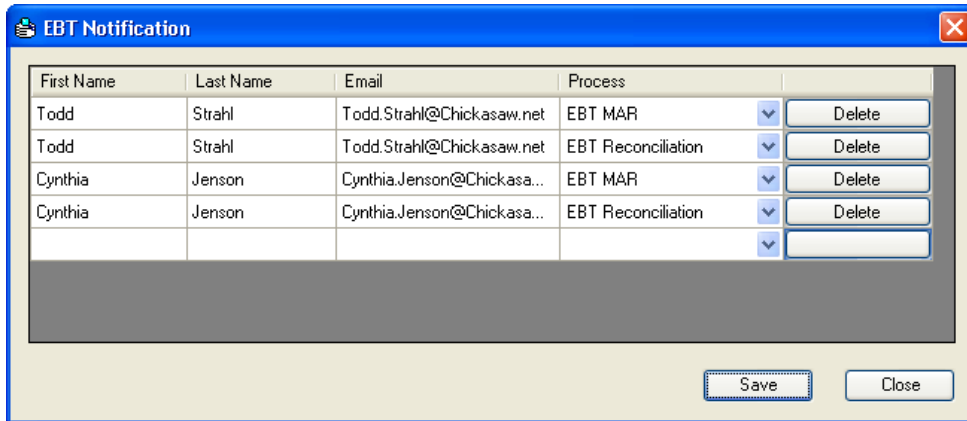
### STEP 1: DISPLAY THE UPC MAXIMUM ALLOWABLE REIMBURSEMENT (MAR) MANAGEMENT SCREEN

- a. Display the **Reference Utility** screen.



**NOTE:** The **Reference Utility** screen displays upon the completion of the Login process. The **Reference Utility** table displays a list of system functions including a short description for each function.

- b. Double-click **EBT Notification List** in the **Reference Utility** table. The **EBT Notification** screen displays.



EBT Notification Screen



**NOTE:** The **EBT Notification** screen displays the list of staff member names selected to receive system generated notification emails indicating the results of the MAR recalculation process and the reconciliation process.

**STEP 2: MANAGE THE LIST OF STAFF MEMBER NAMES**

- a. Do one of the following:
  - To add a staff member name: Select the next available row in the table and enter a staff member name and their email address. Next, select the type of notification email the staff member is to receive. Continue to repeat this process until you are finished adding staff members names to the table.
  - To delete a staff member name: Select the desired row in the table and then click **Delete** to delete the selected row. The table is refreshed and no longer displays the information in the previously selected row.



**NOTE:** To change previously entered information, simply select the desired grid in the table and enter or select your changes as necessary.



**NOTE:** Only 1 type of notification email can be associated to each row of information in the table. Therefore, if you would like a staff member to receive more than one type of notification email, add a row in the table for each type of notification email he or she is to receive.

- b. Click **Save** to save your changes. A confirmation screen displays.
- c. Click **OK** to dismiss the confirmation screen. You are returned to the **EBT Notification** screen.

**STEP 3: RETURN TO THE REFERENCE UTILITY SCREEN**

- a. Click **Close** to dismiss the **EBT Notification** screen and to return to the **Reference Utility** screen.

# Managing EBT Categories and Subcategories

**Scenario Set-up:** Part of the initial EBT setup process requires you (or someone within your organization) to associate (or map) Categories and Subcategories to Food Distribution Items. Over the course of time, it may be necessary to add additional Categories and/or Subcategories to the system, so that newly added food distribution items can be associated (or mapped) as necessary.

In this case, assume you are interested in adding either an EBT Category or an EBT Subcategory.

The process includes the following system tasks:

- Displaying the **Category/Subcategory Maintenance** screen
- Managing EBT Categories and Subcategories
- Returning to the **Reference Utility** screen



**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.

## Complete the Following Steps to Manage EBT Categories and Subcategories:

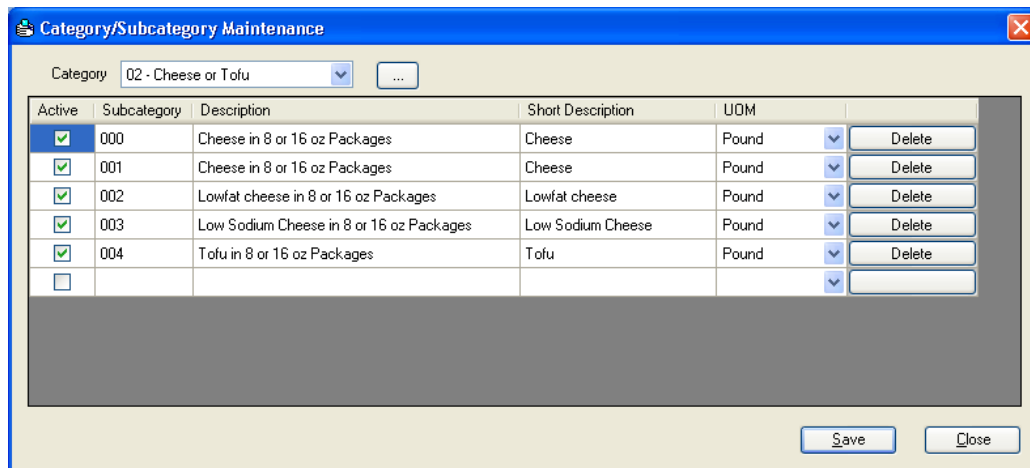
### STEP 1: DISPLAY THE UPC LIST SCREEN

- Display the **Reference Utility** screen.



**NOTE:** The **Reference Utility** screen displays upon the completion of the Login process. The **Reference Utility** table displays a list of system functions including a short description for each function.


- Double-click **Category/Subcategory Maintenance** in the **Reference Utility** table. The **Category/Subcategory Maintenance** screen displays.



Category/Subcategory Maintenance Screen

**STEP 2: MANAGE EBT CATEGORIES AND SUBCATEGORIES**

a. Do one of the following:

- To add a category: Click the ellipses button () to the right of the **Category** drop down list. The **Add Category** screen displays. Enter a value for the **Category**, **Description**, and **Unit of Measure**. Click **OK** to process the screen. The category you entered will be added to the **Category** drop down list and you are returned to the **Category/Subcategory Maintenance** screen. Continue to repeat this process until you are finished adding categories.
- To add a subcategory: First, select a category for this new subcategory in the **Category** drop down list. Then, select the next available row in the table and enter a value within the **Subcategory**, **Description**, **Short Description**, and **UOM (Unit of Measure)** columns. Finally, if you intend to associate the newly entered subcategory to a Food Distribution Item, click the **Active** check box to activate this item. Continue to repeat this process until you are finished adding subcategories to the table.
- To delete a subcategory: Select the desired row in the table and then click **Delete** to delete the selected row. The table is refreshed and no longer displays the information in the previously selected row.



**NOTE:** To change previously entered information, simply select the desired grid in the table and enter or select your changes as necessary.

- b. Click **Save** to save your changes. A confirmation screen displays.
- c. Click **OK** to dismiss the confirmation screen. You are returned to the **Category/Subcategory Maintenance** screen.

**STEP 3: RETURN TO THE REFERENCE UTILITY SCREEN**

- a. Click **Close** to dismiss the **Category/Subcategory Maintenance** screen and to return to the **Reference Utility** screen.

