WINNIE Readiness Guide

VERSION 1.0

UPDATED OCTOBER 24, 2023

Contents

Overview

Purpose of the Document

This document provides information to help Local Agencies track critical activities to prepare for WINNIE rollout. It includes target timeframes to allow for future planning.

FOUR MONTHS PRIOR TO ROLL-OUT

Clinic Readiness

☐ Consider WINNIE Impact on clinic operations.

- **Adjust your calendar: Plan for All Staff logging out of HuBERT for the last time by 12:00 pm the day before your scheduled Rollout.**

- Plan for staff training, approximately three 8-hour days.

- Should you plan for longer (or fewer) appointments during the first weeks of roll-out?

  - Are appointment durations long enough for staff to become accustomed to the changes in flow?

- Is there a need for expanded clinic hours during the first weeks of roll-out?

- How are your clinics' staffing levels for roll-out? Planned absences etc...

☐ Ensure all Certs and MCAs are completed, or that incomplete Certs and MCAs are removed in HuBERT.

- Run the INCOMPLETE MCAS Infoview Report – remove all incomplete MCAs.

- Run the INCOMPLETE CERTS Infoview Report – resolve in one of two ways:

  - If the "Remove Incomplete Certification" option displays in the certification menu, select it to remove the incomplete certification.

  - If the "Remove Incomplete Certification" option is not available in the Certification Menu, start a new Certification, Close the Certification, and Remove the Incomplete Certification.

  - If any of the above options does not resolve your incomplete certification attempt, please call the MN WIC Help Desk.

☐ Ensure Primary Card Holder is assigned to a proxy instead of a participant's State WIC ID

- Run the WIC CARD AND/OR PRIMARY CARDHOLDER NOT ASSIGNED TO REPRESENTATIVE Infoview Report.

  - In HuBERT, reassign all cards and/or primary card holders to an authorized or alternate representative.

☐ Ensure any clinic-level referrals in HuBERT have been changed to agency-level.

- For instructions on how to correct clinic-level referrals, refer to Correcting Clinic-Level Referrals in HUBERT (https://www.health.state.mn.us/docs/people/wic/localagency/infosystem/hubert/clinicreferrals.pdf)

Staff Readiness

☐ Ensure you and your staff are up to date with the information in the current **WINNIE the Scoop!** (https://www.health.state.mn.us/people/wic/localagency/infosystem/thescoop.html)

Equipment Readiness

☐ If you use county-owned hardware, ensure you have a current [Local Agency Hardware Support Agreement](https://redcap.health.state.mn.us/redcap/surveys/?s=DK4EWNEPCKXKRXPH) (https://redcap.health.state.mn.us/redcap/surveys/?s=DK4EWNEPCKXKRXPH) submitted to the State WIC Office.

THREE MONTHS PRIOR TO ROLL-OUT

Clinic Readiness

☐ Ensure All Certs and MCAs are completed, or that incomplete Certs and MCAs are removed.

☐ Ensure Primary Card Holder is assigned to a proxy instead of a participant's State WIC ID

☐ Identify which reports you are running in the HuBERT Application.

- WINNIE does not provide any reports.

- Do you know which Infoview reports to use instead? Please refer to the [Assessment of Reports Needed for WINNIE](https://www.health.state.mn.us/docs/people/wic/localagency/infosystem/winnie/reportsassess.pdf) (https://www.health.state.mn.us/docs/people/wic/localagency/infosystem/winnie/reportsassess.pdf)

Equipment Readiness

☐ Install the Download and Recycle Bin Script that clears the downloads folder nightly. If not previously installed for using Mobile Management Portal.

- Download and Recycle Bin Script and instructions can be downloaded from FileZilla, Agency Gateway/Download and Recycle Bin Script or on the [Technical How-To's](https://www.health.state.mn.us/people/wic/localagency/infosystem/howtos.html) (https://www.health.state.mn.us/people/wic/localagency/infosystem/howtos.html) page of the MDH WIC website.

TWO MONTHS PRIOR TO ROLL-OUT

Clinic Readiness

☐ Ensure All Certs and MCAs are completed, or that incomplete Certs and MCAs are removed.

☐ Ensure Primary Card Holder is assigned to a proxy instead of a participant's State WIC ID

Equipment Readiness

☐ Install SWIPe on all machines that will access WINNIE.

- SWIPe and instructions can be downloaded from FileZilla, Agency Gateway/SWIPe or on the [Technical How-To's](#) page of the MDH WIC website.

☐ If your agency uses a Canon P-215 (not Canon P-215*ii*) scanner, update the scanner Driver on all machines that will use this scanner.

- The updated driver can be downloaded from FileZilla, Agency Gateway/County Installs/P-215Driver_v012sp3.

☐ Ensure that the browser you intend to use, either Google Chrome or Microsoft Edge, is set as your default browser.

☐ Test access to WINNIE URL (https://appwinnie.mnwic.net/) to ensure you can reach the WINNIE log in screen.

Staff Readiness

☐ 6 weeks prior to roll-out:

- Begin review of **WINNIE Training Modules** (https://www.health.state.mn.us/people/wic/localagency/winnie/training.html)

- Begin review of **WINNIE Transition Guide** (https://www.health.state.mn.us/docs/people/wic/localagency/winnie/transition.pdf)
  - This document provides information specific to the transition from HuBERT to WINNIE.

☐ Review the **WIC Information System MOM Policies - Draft**:

- The following are draft MN Operation Manual (MOM) policies for the WINNIE Information System.

  - Section 9.1 Introduction – Draft (PDF). (https://www.health.state.mn.us/docs/people/wic/localagency/program/mom/chsctns/ch9/sctn9_1.pdf)

  - Section 9.2 WIC Information System – Hardware – Draft (PDF). (https://www.health.state.mn.us/docs/people/wic/localagency/program/mom/chsctns/ch9/sctn9_2.pdf)

  - Section 9.3 WIC Information System – Software – Draft (PDF). (https://www.health.state.mn.us/docs/people/wic/localagency/program/mom/chsctns/ch9/sctn9_3.pdf)

  - Section 9.4 WIC Information System – Network, Browser, and User Access Security – Draft (PDF). (https://www.health.state.mn.us/docs/people/wic/localagency/program/mom/chsctns/ch9/sctn9_4.pdf)

  - Section 9.5 WIC Information System – Equipment Inventory – Draft (PDF). (https://www.health.state.mn.us/docs/people/wic/localagency/program/mom/chsctns/ch9/sctn9_5.pdf)

  - Section 9.6 WIC Electronic Communication Security – Draft (PDF). (https://www.health.state.mn.us/docs/people/wic/localagency/program/mom/chsctns/ch9/sctn9_6.pdf)

ONE MONTH PRIOR TO ROLL-OUT

Clinic Readiness

☐ Ensure Primary Card Holder is assigned to a proxy instead of a participant's State WIC ID

☐ Ensure All Certs and MCAs are completed, or that incomplete Certs and MCAs are removed.

☐ Run the STAFF IDs & NAMES Infoview Report and export to Excel.

- Add columns with the following information:

  - Staff email for active users.

  - Indicate users that should be deactivated.

  - Indicate which WINNIE Role each user should have; refer to the WIC Information System User Roles & Definitions (https://www.health.state.mn.us/docs/people/wic/localagency/winnie/roles.pdf)

  - Indicate if access to the Office environment is needed.

- Please send the updated information to Nicole Danberry: nicole.danberry@state.mn.us

STAFF ID	LAST NAME	FIRST NAME	LAST LOGIN	Staff Email	WINNIE ROLE NEEDED	OFFICE ENVIRONMENT ACCESS NEEDED
THIS AGENCY COUNTY PUBLIC HEALTH (011)						
RUBBLB01	RUBBLE	BARNEY	2/9/2023	Please deactivate		
FLINTW01	FLINSTONE	WILMA	5/16/2023	WILMA.FLINSTONE@MYAGENCY.MN.US	WINNIE CPA W/CALENDER, WINNIE AGENCY ADMIN	YES
MOUSEM01	MOUSE	MICKEY	5/31/2023	MICKEY.MOUSE@MYAGENCY.MN.US	WINNIE CPA	NO
MOUSEM02	MOUSE	MINNIE	5/16/2023	MINNIE.MOUSE@MYAGENCY.MN.US	WINNIE CPA	NO
ROSEDA01	ROSE	DAVID	5/31/2023	DAVID.ROSE@MYAGENCY.MN.US	WINNIE CPA	NO
ROSEMO01	ROSE	MOIRA	5/16/2023	MOIRA.ROSE@MYAGENCY.MN.US	WINNIE SCHEDULER	NO
BOOPBE01	BOOP	BETTY	5/16/2023	BETTY.BOOP@MYAGENCY.MN.US	WINNIE PEER	NO
COUNT = 7						

Staff Readiness

☐ Confirm staff have started viewing WINNIE Training Modules (https://www.health.state.mn.us/people/wic/localagency/winnie/training.html).

☐ Log into the Training Environment

- Practice certifications, assigning cards and issuing benefits.

- Ensure SWIPe works correctly on all WIC Machines

ONE to TWO WEEKS PRIOR TO ROLL-OUT

Clinic Readiness

☐ Ensure Primary Card Holder is assigned to a proxy instead of a participant's State WIC ID

☐ Ensure All Certs and MCAs are completed, or that incomplete Certs and MCAs are removed.

Staff Readiness

☐ Confirm staff have viewed the WINNIE Training Modules
(https://www.health.state.mn.us/people/wic/localagency/winnie/training.html).

☐ Ensure all staff have opened the WINNIE Transition Guide
(https://www.health.state.mn.us/docs/people/wic/localagency/winnie/transition.pdf).

- Bookmark the WINNIE Transition Guide to the web page.

DAY PRIOR TO ROLL-OUT

☐ **All staff must log out of HuBERT for the last time by 12:00 pm.**

- While waiting for usernames, staff can:

    - Review WINNIE Training Modules
    (https://www.health.state.mn.us/people/wic/localagency/winnie/training.html).

    - Review WINNIE Transition Guide
    (https://www.health.state.mn.us/docs/people/wic/localagency/winnie/transition.pdf).

    - Review WINNIE the Scoop!
    (https://www.health.state.mn.us/people/wic/localagency/infosystem/thescoop.html).

☐ Usernames and passwords will be provided by the state office staff by 3:00 pm.

☐ Once your username and password have been provided, login to WINNIE.

- Login with the default password and change your password (**NOTE:** the first time you login you may not receive the MFA since your username was made active on the same date.)
- Verify all Agencies and Clinics to which the user should have access appear in the Location Modal.
- On the Module Launcher page
    - Verify that the correct module(s) display - Clinic Services (Agency Admin, if applicable access)
    - Bookmark the WINNIE URL
    - Refer to WINNIE Training Module: Accessing WINNIE 3
    (https://www.health.state.mn.us/training/cfh/wic/winnie/access3/index.html)

- If unable to login, or if set-up is incorrect, **call the MN Help Desk immediately: 1-800-488-8799;2,2.**
- Ensure pop-up blocker is off in default browser.
    - Refer to WINNIE Training Module: Documents Overview 1 (https://www.health.state.mn.us/training/cfh/wic/winnie/docs1/index.html)
- Ensure download settings are correct.
    - Refer to WINNIE Training Modules:
        - o Managing Downloads in Google Chrome (https://www.health.state.mn.us/training/cfh/wic/winnie/docs3a/index.html)
        - o Managing Downloads in Microsoft Edge (https://www.health.state.mn.us/training/cfh/wic/winnie/docs3b/index.html)
- Verify Password Manager settings.
    - Refer to WINNIE Training Module: Accessing WINNIE 2 (https://www.health.state.mn.us/training/cfh/wic/winnie/access2/index.html)

FIRST DAY OF ROLL-OUT

☐ Ensure MFA is required at login.

- If you don't receive the MFA email within a few minutes:
    - Check your junk mail.
    - Ensure your email is refreshing and that you are receiving emails.

☐ Set your WINNIE resolution.

- Resolution can be modified with the zoom function in the browser settings. Screen layout will change based on zoom and screen size/resolution. You may find that a zoom setting of 75-85% on a 15.6-inch laptop is ideal for viewing with reduced scrolling. However, a user can set their zoom to whatever resolution works best for them.

Reference – Complete Listing of Hyperlinks

Assessment of Reports Needed for WINNIE
(https://www.health.state.mn.us/docs/people/wic/localagency/infosystem/winnie/reportsassess.pdf)

Correcting Clinic-Level Referrals in HUBERT
(https://www.health.state.mn.us/docs/people/wic/localagency/infosystem/hubert/clinicreferrals.pdf).

Documents Overview 1 (https://www.health.state.mn.us/training/cfh/wic/winnie/docs1/index.html)

Local Agency Hardware Support Agreement
(https://redcap.health.state.mn.us/redcap/surveys/?s=DK4EWNEPCKXKRXPH)

Managing Downloads in Google Chrome
(https://www.health.state.mn.us/training/cfh/wic/winnie/docs3a/index.html)

Managing Downloads in Microsoft Edge (https://www.health.state.mn.us/training/cfh/wic/winnie/docs3b/index.html)

Section 9.1 Introduction – Draft (PDF).
(https://www.health.state.mn.us/docs/people/wic/localagency/program/mom/chsctns/ch9/sctn9_1.pdf)

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Technical How-To's (https://www.health.state.mn.us/people/wic/localagency/infosystem/howtos.html)

WIC Information System User Roles & Definitions
(https://www.health.state.mn.us/docs/people/wic/localagency/winnie/roles.pdf)

WINNIE the Scoop! (https://www.health.state.mn.us/people/wic/localagency/infosystem/thescoop.html)

WINNIE Training Modules (https://www.health.state.mn.us/people/wic/localagency/winnie/training.html)

WINNIE Transition Guide (https://www.health.state.mn.us/docs/people/wic/localagency/winnie/transition.pdf)

WINNIE URL (https://appwinnie.mnwic.net/)