WINNIE Transition Guide

VERSION 1.0

OCTOBER 25, 2023

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Overview

Purpose of the Document

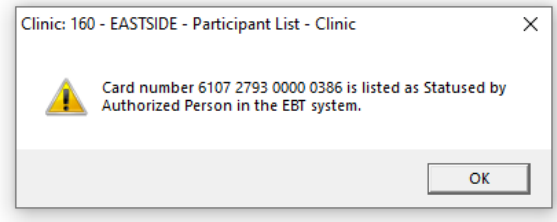
This document provides information specific to the transition from HuBERT to WINNIE.

HuBERT TRANSITION

Agencies using HuBERT during the WINNIE rollout MUST review this information for transition issues.

Participant Search

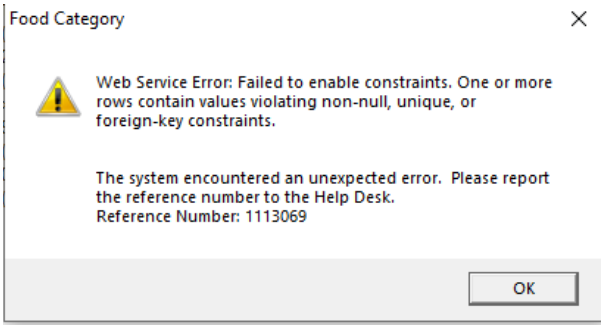
Issue: Unable to search for a household by card number using the PAN field for a participant issued the card in WINNIE. You will receive an incorrect message that the card has been "Statused" by Authorized person.



What to do: Use an alternate way to search for the household; Household ID, State WIC ID, or name.

Direct Ship

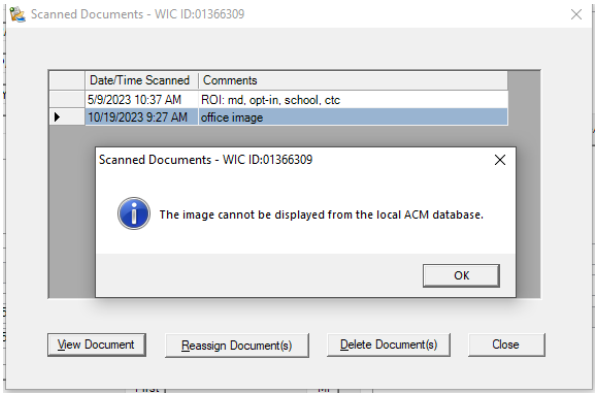
Issue: Benefits that are **partially** direct shipped and **partially** issued the eWIC card at the same time in WINNIE **cannot be adjusted or voided** in HuBERT, the following error is received.



What to do: Agencies should not issue more than 1 month of formula via Direct Ship. If you need to change a formula that was issued in WINNIE as part direct ship/part issued to the card, you must call the MN WIC Help Desk to have it changed at the eWIC processor.

Unable to view Documents uploaded/scanned in WINNIE.

Issue: When a document is scanned or uploaded in WINNIE you cannot view the document in HuBERT. WINNIE stores these documents differently, so they are able to be displayed in the browser. If you attempt to open one of these documents, you will receive the error below.



What to do: If you need to view a document that was scanned/uploaded in WINNIE you will need to call the MN WIC Help Desk.

WINNIE TRANSITION

Agencies using WINNIE should review this information for transition issues.

Incomplete Mid-Certification Assessments

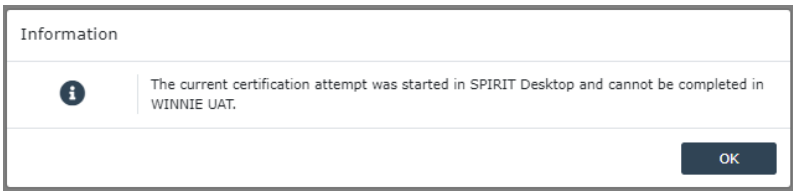
Issue: WINNIE only allows users to remove, not resume, incomplete MCAs started in HuBERT.

What to do:

1. If you would like to complete an MCA for the participant, select to Remove the Incomplete MCA and start a new one in WINNIE.
    a. Due to URB# 217398, remember to note the proofs before removing the incomplete MCA and reenter the proofs during MCA.
2. If you want to start a recertification, select to Remove the Incomplete MCA for the participant and select to Start a Certification.

Incomplete Certifications

Issue: In WINNIE, participant folders with an incomplete Certification started in HuBERT will display the option in the left navigation pane to Resume Incomplete Certification or Remove Incomplete Certification. However, if the user clicks either of these options the message, “The current certification attempt was started in SPIRIT Desktop and cannot be removed in WINNIE.” will display.



What to do: To resolve this issue, the user will need to call the MN Help Desk to have the current certification attempt removed.

Difference in measurement calculations

Issue: WINNIE saves data to two decimal places, rather than only one decimal place as was previously done in HuBERT. The two decimal places make the values more accurate, however in some instances they are slightly different than the HuBERT calculations. These differences could, in some instances, trigger a Risk Factor recalculation to either add or remove a Risk Factor based on the new values. An example is below.

MEASURES		
AGE	HEIGHT	WEIGHT
2	34 4/8	30 # 0 oz
2 ½	36 1/8	33 # 3 oz

SYSTEM	LEGACY	WEB	LEGACY	WEB
HEIGHT	34.5”	34.5”	36.1”	36.13”
WEIGHT	30.0 #	30.0 #	33.2 #	33.19 #
BMI	17.70	17.72	17.90	17.88
BMI %	79.13%	79.45%	88.51%	88.25%

What to Do: Staff should be aware if a Risk Factor was added/removed or if they are now high risk because of the recalculation and provide the correct education if needed.

Correspondence Preference in Household Demographics

Issue: In HuBERT, the Correspondence Field was not required. If left blank the default was English. In WINNIE this field cannot be left blank; a value is required.

What to Do: If you are updating the Household Demographics this field will now be required, your options are English or Spanish. You should select English from the drop-down for participants whose correspondence preference is anything other than Spanish.

NEED ASSISTANCE?

MN WIC Help Desk

The MN WIC Help Desk is always your first call for assistance with HuBERT or WINNIE and are available Monday through Friday from 7:00 AM to 7:00 PM by phone or email:

Phone: 1-800-488-8799 – press 2 for Minnesota, then

Press 2 - for regular help line
Press 1 - if urgent (unable to issue benefits or serve participants)

Email: mnhelpdesk@gainwelltechnologies.com

WINNIE Open Issues

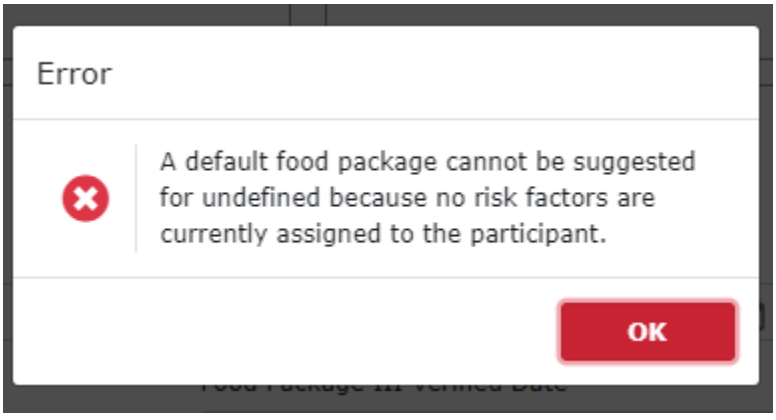
This section contains open issues within WINNIE.

At the end of each title is a series of number that identifies the User Reported Bug (URB).

HOT Fix:

No Food Package Generated for mom when changing from BF to NBF in infant's folder (URB# 217581 – Included in HOT Fix).

Issue: When changing infant to non-breastfeeding in the infant's health information page, an error message appears indicating *"...cannot be suggested for undefined..."* and a default food package will not be suggested for mom. This is due to Risk Factors not resolving correctly during the category change process.



What to do: If you haven't started the category change process, navigate to mom's folder and change breastfeeding status there rather than in infant's folder. If you have already made the change and receive the message, in the mom's folder assign a risk factor and then create a food prescription.

Risk Factor 601 Assigned during VOC with no Linked Infant (URB# 197852 – Included in HOT Fix).

Issue: Risk Factor 601 - Breastfeeding Woman of an Infant at Nutritional Risk - is assigned based on a linked infant. However, this risk factor is being assigned during a BF VOC cert with no infant record created.

What to do: No action needs to be taken.

Risk Factors incorrectly assigning and resolving for BF woman (URB# 217629 – Included in HOT Fix).

Issue: When updating household smoking information to Yes in the mother's Health Information page, the Risk Factor 904 is not properly assigned, and Risk Factor 601 is incorrectly resolved. However, in the infant's folder, the Risk Factor 904 is properly assigned.

What to do: Reassign Risk Factor 601, if applicable, in the mother's folder. Document that Risk Factor 904 should be assigned in a Note in the mother's folder.

Quantities not removed in Change Household ID adjust benefits when redemption assigned to Participant being removed (URB# 217868 – Included in HOT Fix).

Issue: When a household has multiple people issued the same food items and there has been a redemption. For the individual who the redemption was assigned to, when you do a CHHID and remove the rest of the food item from old household and reissue the removed amount, removed amount does not remove.

What to do: No action needs to be taken.

BENEFITS:

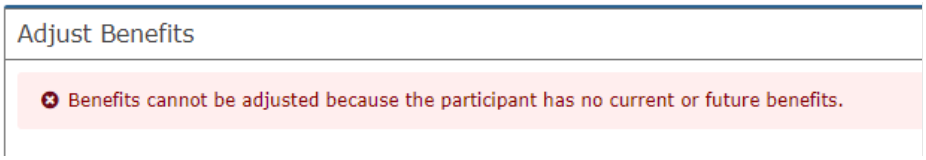
Able to Adjust Benefits when Homeless Verified Date is greater than 30 days in the Past (URB# 198880).

Issue: For a Participant whose Homeless Verified Date was more than 30 days in the past, the message stating, "Benefits cannot be adjusted because the household's homeless verified date is not within 30 days of today's date" does not display when attempting to adjust benefits. The user can successfully adjust benefits.

What to do: Update Homeless Verified date when reviewing Demographic Information with Participant prior to adjusting benefits.

In Adjust Benefits - The message that displays after voiding current benefits can be misleading (URB# 199694).

Issue: The message can be misleading due to having just voided all the benefits. Since the screen is the Adjust Benefits screen the message will display.



What to do: No further action needed the benefits were voided and the participant has no current or future benefits.

In Adjust Benefits - Update Future Months not copying current month correctly if making multiple changes to the same food item (URB# 201792).

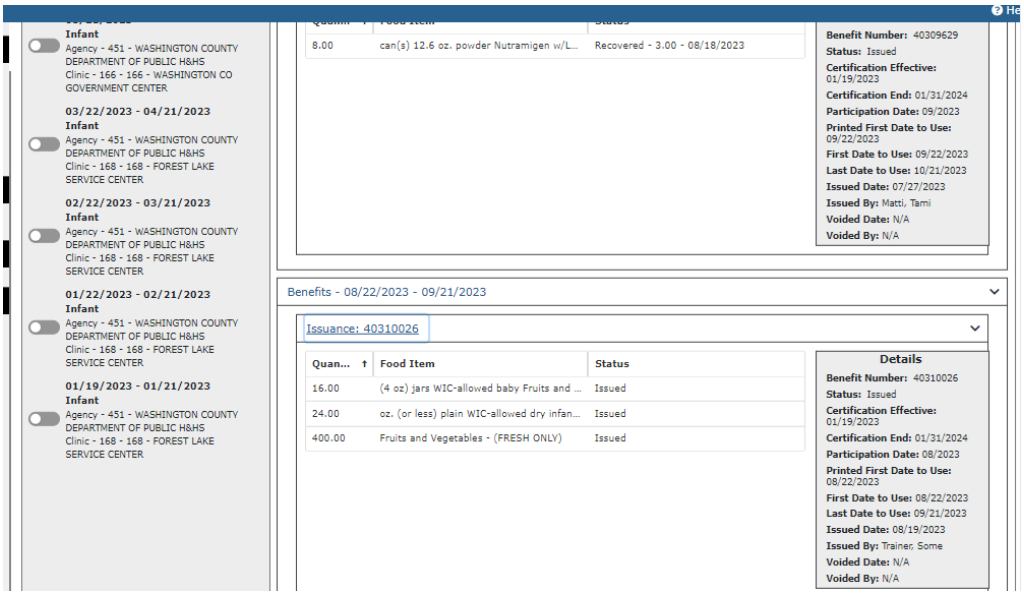
Issue: When recovering an item and selecting Update Future Months, if you put that item recovered back to 0 and recover another item, the update future months does not copy correctly. For example, if 1.00 eggs were recovered and future months were updated, then put the eggs recovered back to 0.00 and recovered 1.00 of juice before updating future months again, the future months display both eggs and juice recovered.

What to do: When using the "Update Future Months" function make sure to verify the correct quantities before you Send eWIC Data.

Displaying Incorrect Issued Date for Adjusted Benefits (URB# 215437).

Issue: Benefits adjusted after 7:00 PM, displays issued date in the Benefit History details as the next day. This is due to the time for adjusting benefits being recorded in Universal Time Coordinated (UTC) instead of our actual time zone of Central Standard Time (CST).

NOTE: This does not occur with initial benefit issuance after 7:00 PM only with adjustments.



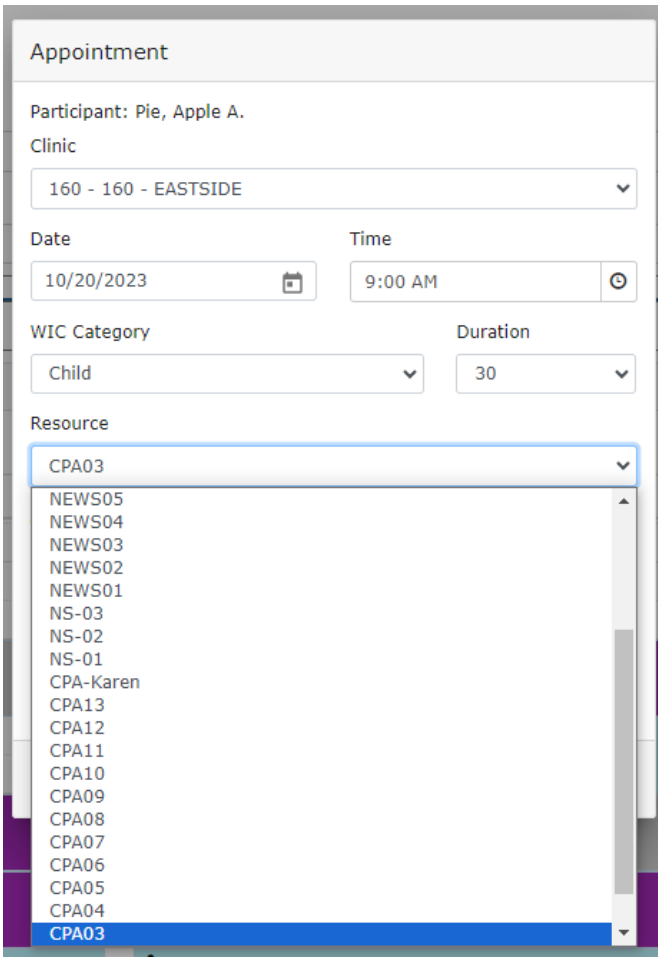
What to do: This is a display issue; benefits are updated correctly at the eWIC processor.

CALENDAR/RESOURCE SCHEDULE:

Appointment modal Resource dropdown incorrectly displays all agency Resources when viewing through an already scheduled appointment. (URB# 213821).

Issue: If an already scheduled appointment is opened to view the details on the Scheduler screen, the list of resources in the Resource dropdown list is not filtered to those available in that clinic on that date, it lists all resources.

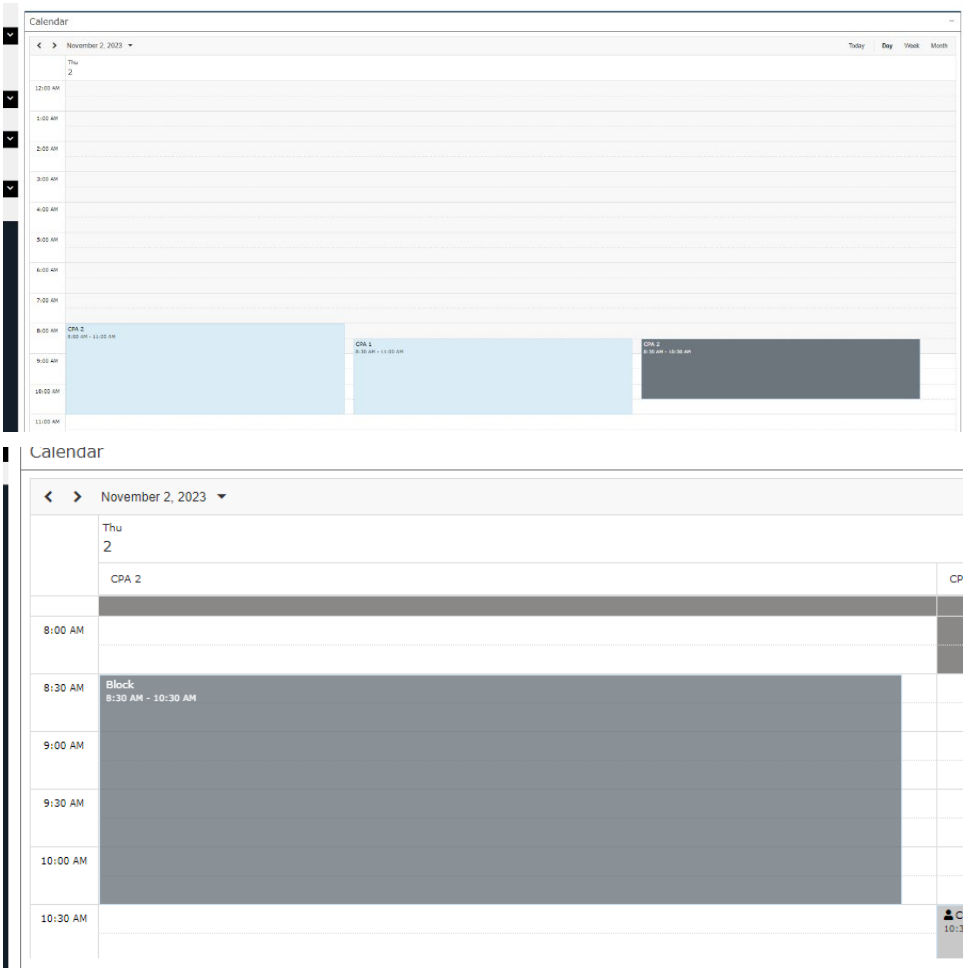
Example: this clinic date only has CPA1, CPA2 and CPA3 available.



What to do: This is a display issue. If you attempt to change the resource to one that is not available, you receive the correct message "The resource is not scheduled during the selected time".

Blocks do not appear within resource's scheduled hour column in Agency Admin (URB# 189341).

Issue: When blocking time off an existing resource's schedule, the blocks for a resource's schedule don't display within the same column as the resource's scheduled hours in Agency Admin. This makes it difficult to see at a glance that the block has been applied to the resource's schedule or which block applies to each resource's scheduled time when you're trying to edit it. The block does show correctly in the Clinic schedule and Scheduler screen in the participant folder.



What to do: This is specific to the role with access to building and adjusting the calendar in Agency Admin. Other staff can ignore this issue.

Changing the sort order of Resources does not change the order the Resource columns display in the Appointments Grid. (URB# 181360)

Issue: The sort order that is set in Agency Admin/Resources is not reflected correctly in the scheduler.

What to do: At this time, the order in which the Resources display cannot be controlled.

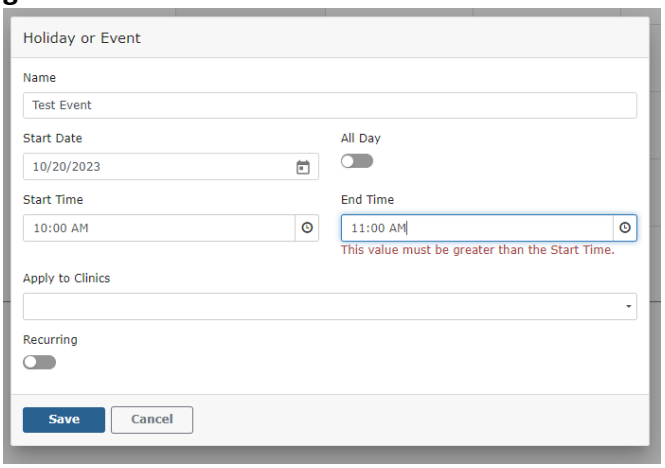
Deleting Holiday/Event Series Confirm Message Reads "This Series of Classes" (URB# 209994).

Issue: When deleting a series of events, the Confirm message reads: Are you sure you want to delete this series of classes? This should read: Are you sure you want to delete this series of **events**?

What to do: This is display only and will delete the events as expected.

End Time Validation Displays Even if Time Entered Meets Requirement When Creating Holiday/Event (URB# 209826).

Issue: When creating an event during a specified time, for example entering 10:00 AM into the Start Time, and end time is 11:00 AM, the validation displays that reads: **This value must be greater than the Start Time**.



What to do: Disregard message, click Save or Cancel, and the message will no longer display.

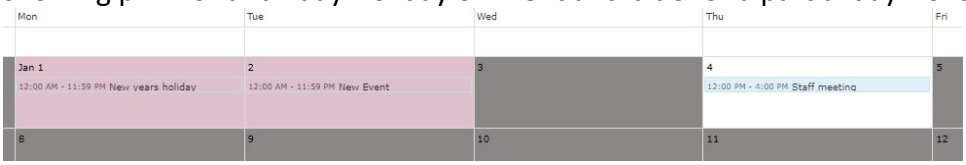
Household Appointment Blocks Do Not Indicate Appts Scheduled Within by Color (URB# 181417).

Issue: When a household appointment is scheduled, there is no indicator, by color of the types of appointments within the household block.

What to do: This is a display issue with no color showing to view the appointment types for the household. Open the appointment to view the details.

Legend on Clinic Schedule incorrectly shows Blue for an “Event" and Pink for a “Holiday” (URB# 209993).

Issue: The color Legend on the calendars display pink "Holiday" and blue "Event". However, it is showing pink for a full day Holiday or Event and blue for a partial day Holiday or Event.

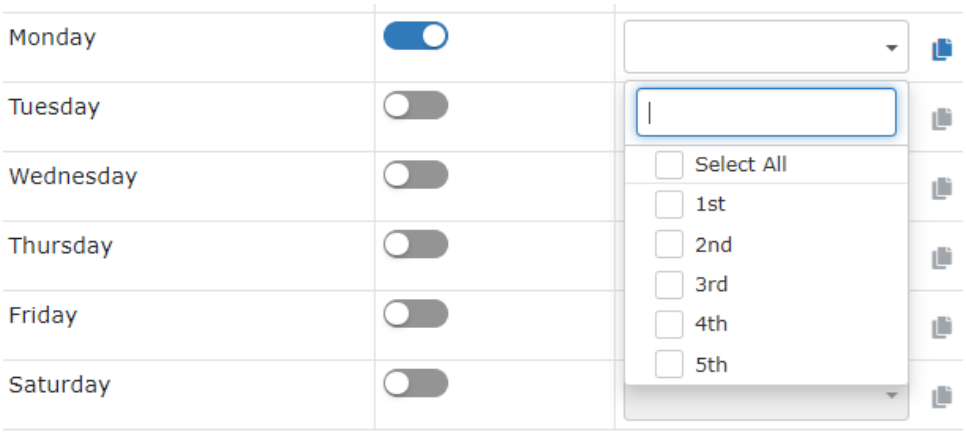


What to do: Display issue only, ignore Appointment type legend colors for Holidays/Events.

Selecting Weeks of Month Drop-down Displays in Field Below (URB# 185957).

Issue: When a user selects the Weeks of Month drop-down when scheduling resources or in the Block Recourse Schedule(s) modal, the field below it is highlighted and the options display as if for the day below the selected drop-down. If a user selects a drop-down field, **that drop-down field** is highlighted and the options display below **that** field.

For example: Monday is Toggled On in the Select column in the Resource Hours by Day Grid. However, when you click the drop-down, the field for Tuesday is highlighted and the drop-down options displays as if for Tuesday.



What to do: This is a display issue. For ease when selecting for multiple days, starting at Friday assists with the visual issue.

Unable to delete a series of appointments for a resource if one of the days within the series has an appointment scheduled. (URB# 210467).

Issue: If you attempt to delete a series of days for a resource, if one of the days contains an appointment, none of the days can be deleted.

What to do: Delete the Resource(s) schedules individually.

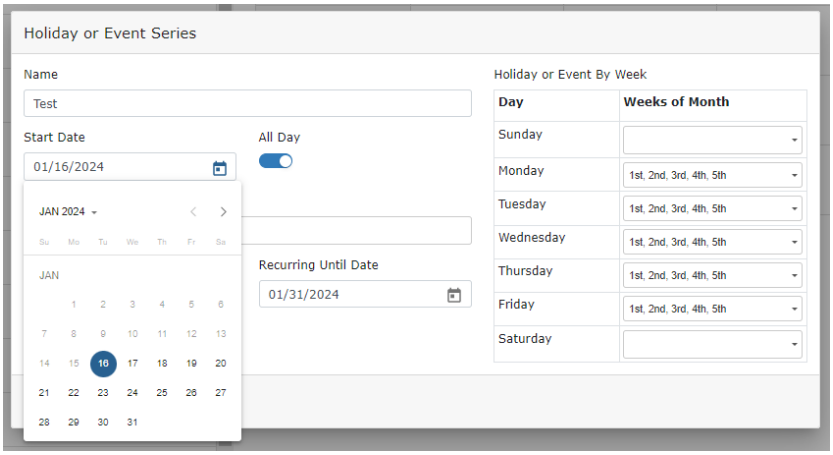
When Adding a Second Block for the Same Date and Same Resource the Information message “The resource is already blocked” incorrectly displays (URB# 210475).

Issue: If a resource has a block defined for a specific date and a second block is created for that same date, when saved, the following message displays: The resource is already blocked.

What to do: Click OK through the message, the blocked time-period displays correctly on the calendar.

When attempting to edit an already created and reoccurring Holiday or Event Series, the dates after the current date and prior to the start date of the Holiday or Event are incorrectly disabled. (URB# 209997).

Issue: When editing a reoccurring Holiday or Event Series, the dates in the calendar control between today and the date previously entered in the Start Date field are incorrectly disabled.



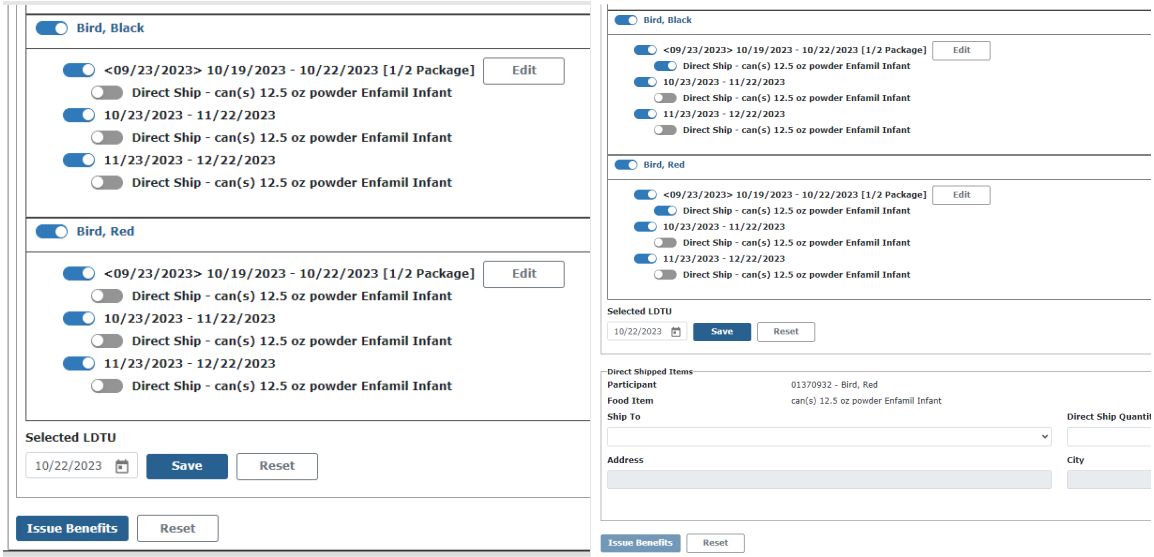
What to do: If you need to edit the Start Date you can manually enter the new Start Date in the field.

DIRECT SHIP:

Direct Ship Cards Display in Incorrect Order if Two Members Issued Direct Ship & Second Member Toggled on First (URB# 199390).

Issue: When more than one household member is receiving direct shipped benefits, if the user clicks on the second member listed in the Issuance Details screen first then the first member second, the cards are not in the correct order for Direct Ship.

Example: If Black Bird is listed first on the screen and you toggle on DS for Red Bird first, Red Bird will be the first to display when the Direct Shipped Items Cards open.



What to do: As always, when completing the Direct Shipped Items card, be aware of the participant listed on the card.

Future Month Direct Ship Formula Not Being Voided During Change Household ID (CHHID) Process Causing Over Issuance for Future Month Sets (URB# 218404).

Issue: Direct ship formula is not being voided for **future month** benefits during the CHHID process. Upon completing the CHHID for that scenario, the user receives the confirmation that future month benefits were voided. However, the Direct shipped benefits are not. The Benefit History screen continues to display the future month DS formula as 'Issued'.

What to do: If the participant has future months of benefits that were direct shipped, prior to starting the Change Household ID process, **the future months of benefits should be voided**. Do not void the current month.

DISPLAY:

Mother's WIC Category Change Modal occasionally not displaying upon first save on demographics screen (URB# 197031).

Issue: The Mother's WIC Category Change modal should display when the user changes the WIC Category in the Demographics screen for a woman who is less than 6 months postpartum (Bf to NBF or vice-versa) the first time the Save button is selected.

What to do: Click the Save button again.

Sidebar menu: Collapse/Expand Function does not Work as Expected (URB# 180989).

Issue: The sidebar does not retain a user's choice to keep the menu options collapsed. Any screen changes result in the sections re-expanding.

What to do: Display only.

DOCUMENT IMAGING:

Documents scan in color regardless of color toggle (URB# 199805).

Issue: Document scans and displays in color whether toggle is on or off.

What to do: No action to be taken.

FOOD PRESCRIPTION:

When adding a General Note from Within the Food Prescription Page it doesn't save. (URB# 219085).

Issue: If attempting to create a General Note from withing the Food Prescription page, it appears that it saves but it does not.

What to do: Do not use the Add General Note option within the Food Prescription. Instead, use Manage Notes to add a note.

HEALTH INFORMATION:

Inconsistently receiving an error message when attempting to save Health Info page for a Non-Breastfeeding (NBF) woman (URB# 218645).

Issue: When certifying a Pregnant woman as NBF, we are inconsistently receiving the message: *An error occurred. If problem persists, please contact tech support.*

What to do: Select the Save button again and ensure the green "Changes saved." message displays.

HOUSEHOLD DEMOGRAPHICS:

Address History screen does not sort chronologically (URB# 217712).

Issue: When you first enter the address history screen, the results are not sorted correctly by the Changed Date.

	Changed Date
	10/19/2023 10:38 AM
	08/04/2020 05:40 PM
	08/04/2020 05:53 PM
	08/04/2020 05:53 PM
	05/05/2021 08:45 AM
	09/02/2021 09:43 AM
	09/02/2021 09:43 AM

What to do: Click the Changed Date title to resort ascending or descending as needed.

INCOME:

Able to Delete Itemized Income After Completing Certification from within the participant folder (URB# 197531).

Issue: System allows user to remove the itemized income the same day that the certification was complete.

What to do: Staff should **never** delete an itemized income from within the folder on the same date as the certification. This income is part of the certification record and should not be altered.

Resolving MA Pending Proof on the same day as the certification, when there are multiple members certified, not updating the Proof when edited (URB# 197826).

Issue: If you certify multiple participants in a family on the same date with an income contact that is pending proof of MA, and then the participant returns the same day with proof of MA, the income is updated in one of the participant's folders. However, the Pending Proof will toggle off for all the members in the household, but the new proof of income does not update.

What to do: If proof of MA is provided the same day as the certifications, you will need to go into each household member's folder to update the proof field to the appropriate value.

INITIAL CONTACT:

Participant name on Initial Contact Modal displays with an extra period when no middle initial is captured in the system (URB# 213481).

Issue: If a participant does not have a middle initial captured in the system, the participant's name is displaying with a period between the first and last name on the Initial Contact Modal.

What to do: This is a display issue.

LOGIN:

Forgot/Change Password does not work once the account is locked (URB# 209032).

Issue: Once a user's account is locked due to Invalid login attempts being exceeded, trying to use the Forgot/Change Password link no longer works.

What to do: If the user account becomes locked, call the MN WIC Help Desk to have it unlocked reset your password.

When the Reset Password link in the Reset Password email has expired an "Invalid token" message incorrectly displays (URB# 203556).

Issue: If the link on a Reset Password email, that is more than 24 hours old is clicked on, once the user enters the New Password and the Confirm Password then clicks Save, a red "Invalid token" message is displaying.

What to do: If your Reset Password email is more than 24 hours old, select the "Forgot/Change Password?" link again and reset it immediately.

MANAGE ALERTS/NOTES:

ALERTS: System Alerts should display for all household members regardless of whose folder is opened (URB# 219163).

Issue: The Pregnant and Breastfeeding system alert only displays when the Pregnant participant's record is opened. It did not display when the Infant's record was opened. Any System Alert should display for all household members when any household member's record is opened.

What to do: When opening a household, with multiple members, containing a Pregnant or Breastfeeding participant, open that folder first.

Unable to Edit a SOAP note started in the Certification after the Certification is completed. (URB# 218522).

Issue: When starting a SOAP note in the Certification you are unable to edit it on the same date in the Participant folder.

What to do: If you start a SOAP note in the Certification, you must complete it prior to completing the Certification. If you start a SOAP note in the participant's folder on the same date as the Certification, you can edit it on that same date.

MID-CERTIFICATION ASSESSMENT:

Remove Incomplete MCA is deleting the Proofs collected at Certification (URB# 217398).

Issue: When an attempted MCA is removed, the system deletes the saved Proofs of ID and Address that were obtained during the previous Certification.

What to do: If an MCA cannot be completed, prior to selecting to Remove the Incomplete MCA. View the Proofs in the Participant Action Menu dropdown and note the values that are saved. After removing the incomplete MCA if the Proofs have been removed, re-enter the Proofs back into the Proofs Modal.

NUTRITION ASSESSMENT:

Questions that are skipped or not answered when completing a Nutrition Assessment contact are still displaying with "Not Answered" in the comments (URB# 217769).

Issue: When completing a Nutrition Assessment contact, if a question is skipped and then a question is answered after it, the questions in between the two answered questions will display with "Not Answered" in the comments.

What to do: This is a display issue and can be ignored.

PARTICIPANT SUMMARY:

Participant Summary not displaying in Spanish when correspondence preference set to Spanish (URB# 205360).

Issue: Participant summary does not display in Spanish.

What to do: If a Participant Summary is request for a Spanish speaking participant it should be provided in English.

PRESCREEN:

Clicking Reset Button Removes Default County from Physical Address Section (URB# 208337).

Issue: When prescreening a participant, if the Reset button is clicked to clear the form, the defaulted County is also cleared.

What to do: If reset is used, you will need to select your County prior to entering the City and Zip Code.

RISK FACTORS:

CPA-Designated High-Risk Toggle Not Functioning Correctly (URB# 215125).

Issue: The CPA-Designated High-Risk toggle is toggling off every time the system assesses for Risk Factors (RFs), changes are made to toggles on Health Info, or Health Info is saved. Once toggled on, the toggle should remain on until the next certification or it is toggled off.

What to do: If the CPA-Designated High-Risk toggle is turned off, toggle it back on to maintain the yellow banner.

Occasionally adding CPA assigned Risk Factors that are High Risk causes non-high-risk CPA assigned Risk Factors to display High Risk Asterisk (URB# 199262).

Issue: Occasionally, when a user adds a CPA-assigned Risk Factor that is high risk along with RFs that are CPA-assigned and NOT high risk, the ones that are not high risk display the high-risk asterisk.

What to do: This does not happen consistently and is a display issue only.

Risk Factor 103 being assigned when changes made to health information in folder if all current and previous height/weight measurements are marked as “Unknown”. (URB# 217535).

Issue: When making a change to a child’s (age 2-5) health information screen and selecting save, the RF are reassessed and if all current and previous heights/weights in the folder are marked as “Unknown”, RF 103 is assigned to child, and they become high risk.

What to do: When a height and weight measurement is entered in the folder, the RF is resolved if it does not apply to an actual height and weight measurement.

When WIC Category Changes from Infant to Child by EOD, Infant RFs Not Resolved on Risk Factor Page (URB# 218445).

Issue: The infant risk factors are not always resolving, when the infant is changed to a child by the end-of-day process, which should create a pseudo-cert. The pseudo-cert should result in an evaluation of current risk factors and the resolution of any that no longer apply to the new WIC Category.

What to do: This is a display issue. If, however, you need to create a child's food prescription prior to recertification as a child you may receive an error message that the system cannot create a Default Food Package because there are no existing Risk Factors. You can either create the food prescription manually or add a Risk Factor and then create then Default Food Package.

VOC:

Mid-Certification Assessment Due Date Not Calculated for VOC Certified Child and Breastfeeding Participants (URB# 218955).

Issue: When a child or breastfeeding participant is certified with a VOC the MCA due date is not auto calculated as it should be when their certification end date is greater than 6 months in the future.

What to do: Create an alert indicating when the MCA should be completed.

Validation message "No Pregnancy Record Found" missing from VOC Certification Modal (URB# 197876).

Issue: The "No Pregnancy Record Found" validation message is missing from the VOC Certification screen. This occurs when “Yes” is selected for the “Was this participant active in your WIC program during her most recent pregnancy?” for a new Household or a participant with a very old record that was not on WIC during her previous pregnancy.

What to do: Only select “Yes” to the question if the participant was in fact on WIC during the previous pregnancy in the State of Minnesota.

Version Control

Document Revision History Table

Version	Date	Description	Summary of Changes
1.0	10/25/2023	Draft for pilot	

Minnesota Department of Health - WIC Program, 625 Robert St. N, PO BOX 64975, ST PAUL MN 55164-0975. 1-800-657-3942, health.wic@state.mn.us, www.health.state.mn.us; to obtain this information in a different format, call: 1-800-657-3942.

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