

# WINNIE the Scoop! Newsletter #10

AUGUST 18, 2021



# Please share this information with all WIC Information System users!

Reminder! Please submit any WINNIE questions for the WIC Conference by August 20<sup>th</sup>!

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# The WINNIE Application/Software

Although WINNIE isn't considered a "new" system (since the database is the same and the internal code is simply being rewritten) like when we transitioned to HuBERT, by the very nature of making the system browser-based, how it looks and feels to the user will be very different.

Therefore, going forward we will take a look at some of the screens in WINNIE and some exciting new changes that will be coming. In this newsletter, we'll take a look at transfers, in-state and VOCs.

# **In-State Transfers**

Transfers in WINNIE function similarly to HuBERT. In-state transfers are initiated by double-clicking on the participant "card" (1), or clicking the Open Folder icon (2), on the Search (3) screen to open the Participant Folder.

III Clinic Services				Help
≡ ≇ Participant List ✓	Agency 241 - HENNEPIN COUNTY HUMAN SERVICES	S AND PUBLIC HEALTH - Clinic 089 - 08	89 - SOUTH •	Î
Q Search	Search Criteria	0		-
Create New Household     Documents     Locked Households     Anage Waiting List     Participant Transfer History     Potential Duplicate Participants     Work With On-Site Group     Calendar     Scheduler	Appointments     On-Site     Clinic     Agency       State WIC ID     Household ID       Participant Last Name       b       Scarch     Clear	Statewide Participant Auth Rep Card Number Participant First Name	Participant MI	Participant Date of Birth mm/dd/yyyy 🖆 Show Details
	Results Sort Order Participant Last Name	Descending		-
	(01079248) 4 years, 7 months and 25 days		Agency: 241 - HENNEPIN COUNTY	HUMAN SERVICES AND PUBLIC HEALTH Clinic: 092 - 092 - BROOKDALE
	Date of Birth 12/23/2016	Household ID 13617648	Authorized Rep	
	WIC Category Child	Gender Female Double-clic to open the	k the participant "card" 2 e Paricipant Folder.	Open Folder

A confirmation message (1) displays if the participant currently belongs to another clinic or agency (2) from the agency/clinic the user is currently working in (3).

III Clinic Services			😧 Help
😑 📽 Participant List 🛛 🗸	Agency 241 - HENNEPIN COUNTY HUMAN SERVICES AND PUBLIC HEALTH - Clinic 089 - 089 - SO	итн - 🗿 Agency and clii	nic currently working in.
Q Search	Search Criteria		
≅ Clinic Actions 🗸 🗸			
Create New Household  Documents  Cocked Households  Manage Waiting List  Participant Transfer History  Potential Duplicate Participants  Work With On-Site Group  Colendar  V	Appointments     On-Site     Clinic     Agency     Statewide     Participant     Auth Rep       State WIC ID     Household ID     Card Number       Participant Last Name     Participant First Name       b	Participant MI	Participant Date of Birth mm/dd/yyyy
6 Scheduler	Scarch     Clear     Confirm       Results     Sort Order     Participant Last N       Image: the start of the start	Agency and clinic Agency: 241 - HENNEPIN COUNTY Authorized Rep	Show Details

If the participant belongs to the current agency and the user wants to keep them in the same clinic, as long as the user has rights to access that clinic, the user can click No on the message and **easily change the clinic being worked in** by selecting from the Clinic drop-down (1) at the top of the Search screen.

Elinic Services							? Help
≡	Agency 241 - HENNEPIN O	OUNTY HUMAN SERVIC	ES AND PUBLIC HEALTH - Clin	nic	089 - 089 - SOUTH -		
🐣 Participant List 🔹 🗸							
Q Search	Search Criteria			_	089 - 089 - SOUTH		
Æ Clinic Actions ✓				_	090 - 090 - HSB		
A Create New Household	Appointments On-Si	te Clinic Agency	Statewide Participant A	Auth I	091 - 091 - NORTHPOINT		
Documents	State WIC ID	Household ID	Card Number		092 - 092 - BROOKDALE		
Locked Households	State Wie ib	Household 10			093 - 093 - WESTSIDE		
I≡ Manage Waiting List					095 - 095 - CHAMPLIN		
Participant Transfer History     Potential Duplicate Participants	Participant Last Name		Participant First Name		206 - 206 - IOCP	ant MI	Participant Date of Birth
Work With On-Site Group	h				209 - 209 - MOUND		mm/dd/vvvv
	5						

If the participant is to be transferred to the clinic the user is currently working in, like in HuBERT, the user can click **Yes** on the message and the *Transfer Participants* modal (1 - below) (a new window that opens on top of an existing screen and locks the screen beneath it until the new, or top, window is closed) displays.

📰 Clinio									😮 Help
	=	Agency 241 - HENNI	EPIN COUNTY HUMAN SI	ERVICES AND PUBLIC HE	ALTH - Clinic	089 - 089 - SOUTH +			4
📽 Participa	nt List 🗸 🗸	····							
Q Search	Q Search								
🚝 Clinic A	Clinic A Transfer Participant(s) 1								
Create	- ( )								
Locked									
I Manage			INVICES AND FODERCINE		000 000111				
₽ Par 6	Transfer	State WIC ID	Household ID	Name	Date of Birth	Agency	Clinic	Status	th
Work W		01074322	13617648		01/09/1986	241	092	Transfer Eligible	-
🛗 Calend		01074698	13617648		09/17/2012	88	88	Transfer Eligible	
🗯 Schedu		01074699	13617648	1111 - HERE - HERE - I	11/06/2014	88 (4)	88	Transfer Eligible	
		01074700	13617648		09/07/2013	88	88	Transfer Eligible	
	<b>3</b>	01079248	13617648	and the second	12/22/2016	241	092 2	Transferring Participant	
		01133261	13617648	and a second of	01/15/2018	241	092	Transfer Eligible	_
			Selected Row T	ransferring Participant	Already Transferred	Transfer Eligible			
				,					
	OK Cane	cel							

The participant for whom the transfer was initiated (2) displays in the yellow row, and will automatically be transferred as indicated by the *Transfer* toggle (3) that is on and disabled.

All the other household members, regardless of the agency/clinic they currently belong to (4) (including Agency 88), will automatically be toggled on to transfer (5).

However, these *Transfer* toggles are enabled and any of the other members can be individually toggled off to indicate they shouldn't be transferred. All of the other members can be toggled off at the same time using the *Select All* toggle (6) in the *Transfer* column header.

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Transfer Partici	Transfer Participant(s)						
Transfer to							
Agency 241 - HE	NNEPIN COUNTY HUMAN	SERVICES AND PUBLIC	HEALTH Clinic 0	89 - 089 - SOUTH			
Transfer	6 State WIC ID	Household ID	Name	Date of Birth	Agency	Clinic	Status
	01074322	13617648		01/09/1986	241	092	Transfer Eligible
	01074698	13617648		09/17/2012	88	88	Transfer Eligible
	01074699	13617648	11-11 HERE 11-1	11/06/2014	88	88	Transfer Eligible
	01074700	13617648		09/07/2013	88	88	Transfer Eligible
	01079248	13617648	and the second	12/22/2016	241	092	Transferring Participant
	01133261	13617648	and a second second	01/15/2018	241	092	Transfer Eligible

Clicking OK on the modal transfers the selected members and immediately opens the participant's folder to the *eWIC Household Demographics* section (1) of the *Manage eWIC Account* screen (2) where the clinic change can be communicated to the WIC Processor by clicking the Send eWIC Data (3) button.

Clinic Services							<u></u> ?н
≡ ₽ Participant List ✓	Agency 241 - HENNEPIN COUNTY HUMAN	I SERVICES AND PUBLIC HEALTH	inic 089 - 089 - SOUTH		Participant B	(010 e: 4 years, 7 months ar	79248 nd 25 day
Q Search	Manage eWIC Account						
E Clinic Actions	Card History						
A Create New Household		Primary Cardholder:		Household ID:	1361/648		
Documents	@eWIC Household Demographics			612-	cell		
Locked Households     Manage Waiting List	Transaction History	MINNEAPOLIS, MN 55411-0000		612-	Fathers cell		
≓ Participant Transfer History							
Ar Potential Duplicate Participants		Household Representatives					~
🞜 Work With On-Site Group							
🖬 Benefit Management 🛛 🗸		Add Representative E Set Primary	Assign Card "O Re	eset PIN 🙁 Deactiva	ite Card		
🗑 Add Set of Benafits		Representative Name	Date of Birth	Telephone	Card Number	Cardholder	
≓ Adjust Ber ts		Authorized Rep	01/10/1986	612-	610727000000735	Primary	
🚈 Issue Benefits		Alternate Rep 1					
📛 Calendar 🛛 🗸 🗸							
🛱 Scheduler							
🕈 Participant Folder 🛛 🗸 🗸							
Appointments							
D Benefits History							*
Bloodwork							
Demographics		Send ewic Data Cancel					
E construction							
Send eWIC Data Canc	el						
Status: Successfully upda	ted EBA.						

The system ensures communication with the WIC Processor by canceling the transfer if anything else is clicked on within the Participant Folder (x) before sending eWIC data.



Clicking Yes on the Confirm message "Are you sure you want to cancel this participant transfer?" closes the Participant Folder and returns the user to the Search screen.

# Out-of-State Transfers or VOCs

## **Existing Participants**

The Participant Menu (1) displays the VOC Certification option (2) when a participant is not in a current cert; it does not display if the participant is in a current cert.

III Clinic Services						? Help
≡ ₽ Participant List ✓	Agency 241 - HENNEPIN COUNTY HUMAN	SERVICES AND PUBLIC HEALTH	Clinic 089 - 089 -	- SOUTH	1 Pa	rticipant HALLA, VAL (01063773) - Age: 67 weeks and 6 days gestation
Q Search	Demographics					Actions
Clinic Actions Create New Household Documents Cocked Households Hanage Waiting List Participant Transfer History Potential Duplicate Participants Work With On-Site Group	Household Information (13614000) Physical Address 123 This Road MINNEAPOLIS, MN 55454-0000 Mailing Address 123 This Road MINNEAPOLIS, MN 55454-0000	Last Name HALLA WIC Category Pregnant	First Name VAL PMI Number	MI	Date of Birth 01/01/1990	Add Member Change Household ID Generate Account Balance Generate Appointment Schedule Generate Official Notification Generate Participant Summary Generate Shopping List
Benefit Management     ✓     Add Set of Benefits     Adjust Benefits     Issue Benefits     Calendar     ✓     Scheduler	Contact Information 612-123-4567 Homeless Homeless Verified Date	Last Name Homeless Fixed Nighttime Location	First Name	MI Medical Clinic ABBOTT NORTHWE		Issuance Frequency Item Issuance History Manage Alerts Manage eWIC Account Manage Notes Proofs Race / Ethnicity
Y Participant Folder     ✓     Appointments     Benefits History	Authorized HALLA VAL (Mother) S Nontrients Noter Registration			Insurance Type Medical Assistance	,	Status Information View Household ID Change History VOC Certification

Selecting the menu option opens the VOC Certification modal (1).

The WIC Category (2) defaults to the participant's current WIC Category and must be updated as appropriate. The fields are enabled and disabled (3) based on the selected WIC Category.

III Clinic Services		😮 Help
≡	Agency 241 - HENNEPIN COUNTY HUMAN SERVICES AND PUBLIC HEALTH Clinic 089 - 089 - SOUTH	Participant HALLA VAL (01063773)
📽 Participant List 🔹 🗸		Age: 67 weeks and 6 days gestation
Q Search	Demographics	
$\equiv$ Clinic Actions $\checkmark$		
🖀 Create New Household	Household Information (13614000) Last Name First Name MI Date of	Birth Gender
Documents	123 This Ro MINNEAPOL VOC Certification 1	/1990 💼 Female 🗸
Participant Transfer History  Potential Duplicate Participants  Weak With On City Craws	Mailing Ad 123 This Ro MINNEAPOL     WIC Category     Certification End Date       Pregnant     Pregnant     Imm/dd/vvvv	
Benefit Management	Contact In 612-123-45 Expected Delivery Date LMP Start Date	Reason Not Present
Adjust Benefits     Issue Benefits	Homeless Homeless Actual Delivery Date	Medical Provider
Calendar V	Represent w//d/yyyy	ENERA V No Selection V
	Authorized     Priority       HALLA VAL     Vas this participant active in your WIC program during her most recent pregnancy?       Voter Regi     Voter Regi       NOT APPLIC     Initial Contact	V Initial Contact
Certification History	Language	eeding at least 6 months
<ul> <li>Document Imaging</li> <li>Food Prescription</li> <li>Health Information</li> </ul>	Correspon English	or

The same field dependencies, requirements and validations occur as in HuBERT.

For instance, the *Expected Delivery Date* and *LMP Start Date* are inter-dependent; one calculates based on the date entered into the other. Both fields are required and a validation message will display if they aren't completed before clicking OK.

The *Priority* is not required and can be left blank. If blank, the system will auto-assign a Priority based on the participant's WIC Category and assignment of Risk Factor 502 – Transfer of Certification.

Priority	
	~
1	
4	
7	

Only those priorities that can be assigned to the selected WIC Category display in the drop-down.

If the selected Priority is a lower number (higher priority) than that auto-assigned by the system, the system will maintain that Priority. If a higher number (lower priority) is selected, the system will over-write the lower priority with the system-assigned default.

Clicking the Initial Contact button opens the modal.

Initial Contact						
Participant						
HALLA, VAL (01063773) Age: 67 weeks and 6 days gestation	•					
Household ID		Participant Name		State WIC ID		
13614000		VAL . HALLA		01063773		
Date		Туре		WIC Category		
03/22/2021	-	Phone	~	Pregnant	~	
First Appointment Offered		Migrant at Initial Contact				
mm/dd/yyyy	-					
Comments						
Testing VOC - once saved, t	this shou	uld be disabled.				
New Contact Close						

Like in HuBERT, the system does not require an Initial Contact when a VOC is completed for an existing participant and the user is responsible for completing the Initial Contact if it is required for the participant being VOC'd.

If a new Initial Contact is created during a VOC, it will be completed once the VOC is saved (all fields will be disabled).

(Initial Contact, and its functionality, will be reviewed in another WINNIE the Scoop!)

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Selecting Breastfeeding or Non-breastfeeding for the WIC Category enables the question "Was this participant active in your WIC program during her most recent pregnancy?"

Was this participant active in your WIC program during her most recent pregnancy?

Yes

No

If Yes is selected, the system will link the participant's most recent pregnancy record to the new postpartum record (as long as the Expected Delivery Date is less than 58 weeks from the current date).

Selecting Infant or Breastfeeding for the WIC Category also enables the *Breastfeeding Amount* drop-down, which displays options that apply to that category:

Infant WIC Category	Breastfeeding WIC Category
Breastfeeding Amount	Breastfeeding Amount
×	~
Fully Breastfeeding	Fully Breastfeeding
Mostly-Breastfeeding	Mostly-Breastfeeding
Some-Breastfeeding	Some-Breastfeeding
Non-Breastfeeding	

For infants, the *Health Information – Feeding* section is updated when the VOC is saved:

Health Information Field	Non-Breastfeeding Infants Breastfeeding Infants			
Ever BF	Unknown	Yes		
BF Now	Toggle is disabled	Toggled on		
BF Amount	Non-Breastfeeding Selected option (FBF, ME			
BF Verified Date	Disabled	Current date defaults		

For women, the *Health Information – Infants Born from This Pregnancy* is updated when the VOC is saved:

Health Information Field	Non-Breastfeeding Women	Breastfeeding Women		
Infant Status	Unknown	Unknown		
Ever BF	Unknown	Yes		
BF Now	Toggle is disabled	Toggled on		
BF Amount	Non-Breastfeeding	Selected option (FBF, MBF, SBF)		
BF Verified Date	Disabled	Current date defaults		

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## **New Applicants**

The Applicant Prescreen has a VOC Certification toggle directly above the Initial Contact button.

VOC Certification	VOC Certification
Initial Contact	Initial Contact

When toggled on, the *Initial Contact* button becomes disabled since it is included in the *VOC Certification* modal.

When the VOC Certification is toggled on, and the Applicant Prescreen is saved, the VOC Certification modal automatically displays. Most of the VOC Certification functionality is exactly the same. The primary differences are:

- The WIC Category defaults to that selected for the Prescreen and does not need to be updated.
- The Initial Contact is required and must be completed.
- The question "Was this participant active in your WIC program during her most recent pregnancy?" does not become enabled when a postpartum WIC Category is selected.

## **VOC Certifications: Other Functionality**

## **Mid-certification Assessment Due Dates**

A Mid-certification Assessment due date is calculated for infants, children and breastfeeding women with more than 6 months between the VOC Certification date and their Cert End Date. It is calculated by subtracting 6 months from the Cert End Date.

## **System Alerts**

If a Mid-certification Assessment is due within 4 months of today's date, a system alert will display indicating this, as well as an alert indicating a food prescription must be created.

Display Alerts	
System Alerts	
Participant Name	Abbreviated Alert Text
HALLA, VAL	A Mid-Certification Assessment is due on 09/30/2021.
HALLA, VAL	No valid food prescription was found. Review the Food Prescription page.

## Demographics

When a VOC is completed for existing participants, the *Proof of ID* and *Proof of Residency* fields will clear and no longer display the proofs selected for previous certifications.

## **Health Information**

If **a change is made to Health Information after a VOC is completed**, no other fields are required and no validations will display. The exceptions are when changes are made to Health Information and:

• The participant is a Mostly-BF or Some-BF infant, the user will be required to complete the BF Start, Supplemental Feeding Date and BF Verified Date.

- The participant is a Fully BF infant, the user will be required to complete the BF Start and BF Verified Date.
- The participant is a child and the user changes Ever BF from Unknown to Yes, the user will be required to complete the Reasons Stopped, BF Start and BF End Date.
- The participant is a child and the user changes Ever BF from Unknown to Yes **and** toggles on BF Over One Year, the user will be required to complete the BF Start Date and BF Verified Date.
- The participant is a postpartum woman and makes any changes to the *Infants Born from This Pregnancy*, the user will be required to complete all fields in that part of the screen.

## **Risk Factors**

Users can assign risk factors that are both CPA-assigned **and System-assigned**. This includes risk factors that are usually auto-assigned by the system and dependent on supporting information, such as weight/height or blood measurements.

Like HuBERT, VOC Certifications will only display in the Risk Factors screen...

Risk Factors							-
Certification Period							
Ø 08/17/2021 - 03/31/2022	S Assigned	Risk Factors					
	💉 Modify	.≁ Modify					
	Risk Factor ID	Risk Factor Description	Assignment Method	Assignment Date	Risk Factor Resolved	Resolved RF Date	WIC
	502	Transfer of Certification (VOC)	S	08/17/2021			Brea
	4						•
	CPA Designa	ated High Risk					

## ... and not on the Certification History screen.

Certification History	-
Certification Period	O No records to display

# **Submit Your WINNIE Questions!**

The MIS & Data Unit will be presenting information about WINNIE at the upcoming Minnesota WIC Conference, and we want to hear from you! If you've got general questions about WINNIE or the new system's functionality, technical requirements, or our training and rollout plans, submit them using the <u>WINNIE</u> <u>Questions for the State Office</u> form by August 20th to have them answered in the session.

# **Future Newsletters**

Next month, we will take a look at the Food Prescription screen.

# **References – Complete Listing of Hyperlinks**

WINNIE Questions for the State Office (https://redcap.health.state.mn.us/redcap/surveys/?s=YKT3FL3MHT)

Minnesota Department of Health - WIC Program 85 E 7<sup>th</sup> Place, PO BOX 64882, ST PAUL MN 55164-0882; 651-201-4444, <u>health.wic@state.mn.us</u>, <u>www.health.state.mn.us</u>; To obtain this information in a different format, call: 651-201-4444