

# Certification 1D - WINNIE Online Training Module

SEPTEMBER 2023

## Introduction

### Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It's a continued overview of certification in WINNIE, the MN WIC Information System.

### Date

All dates in this module are based on today's date being September 5, 2023.

### <Transition Slide>

<screen description – no audio> Slide transitions from topic slide to Beau Vine's Demographics page in Certification Mode.

### Continue 1

Let's continue our review of Certification Mode for Beau Vine.

We had completed measurements, bloodwork, and income.

### <Transition Slide>

We're going to complete the rest of the cert requirements behind the scenes...

<screen description – no audio> Slide transitions to Food Prescription page.

### End Cert 1

We have two options when finishing the cert: Issue Benefits or Complete Certification.

Both perform the same end cert process; clicking Issue Benefits just opens the Issue Benefits page as the last step instead of returning to Demographics.

## End Cert 2

We mentioned previously that the system allows us to issue late benefits after completing the cert.

We're going to select Complete Certification, since we want to demonstrate that the system gives us the option to issue late benefits even if we don't go directly to issue benefits from within Cert Mode.

Go ahead and select Complete Certification.

## Applicant Certified 1

If all the requirements have been completed, the Applicant is Certified modal displays.

A toggle allows us to generate the Participant Summary for this certification.

If we toggle it on, the document will automatically open in another browser window.

We already reviewed the Participant Summary in detail in a Documents Overview module.

## Applicant Certified 2

The Priority is automatically assigned based on the participant's WIC Category and assigned Risk Factors.

A couple reminders, the lower the number, the higher the priority, and priorities become important if MN WIC ever has to begin a waiting list.

Explanations for each priority can be found in MOM Exhibit 5-U: Participant Priority System.

## Applicant Certified 3

The Certification End Date is dependent on the participant's WIC Category and for infants and children, age.

## <Transition Slide>

<screen description – no audio> Slide transitions to calendar page.

## Cert End 1

Certifications always end on the last date of the month.

Click the button to continue.

## Cert End 2

Infants certified before 6 months of age are certified until the last date of the month they turn one-year-old.

Click the button to continue.

### Cert End 3

Infants certified at 6 months or older are only certified for 6 months.

Click the button to continue.

### Cert End 4

Children who turn 5 years old during their certification are certified until the last date of the month they turn 5-years-old.

Click the button to continue.

### Cert End 5

Breastfeeding women are certified until the last date of the month their infant turns one-year-old.

Click the button to continue.

### Cert End 6

If she stops breastfeeding any time after 6 months postpartum, her cert ends.

Click the button to continue.

### Cert End 7

Non-Breastfeeding women are certified until the last date of the month their infant turns 6-months-old.

Click the button to continue.

### Cert End 8

Pregnant women are certified until 6 weeks past their Expected Delivery Date.

Since we certify until the end of the month, their cert is then extended until the last date of that month.

Click the button to continue.

### <Transition Slide>

<screen description – no audio> Slide transitions to Participant Certified modal.

## Applicant Certified 4

Generally, all we have to do is click OK, or press the Enter key, to close this modal.

Go ahead and do that.

## Signature 1

The next steps are to collect two signatures: the representatives and the certifiers.

We must provide the Rights and Responsibilities for review, which are available on the MDH WIC website.

## Signature 1A

Capturing the representative's signature indicates they understand and agree with them.

## Signature 2

If we click the Cancel button, we cannot re-open this modal and will have to collect the signature using one of the other formats available.

Capturing a signature in WINNIE is always the same and we reviewed the entire process, and alternative formats such as MOM Exhibit 5-B and the REDCap Participant Signature form, in the WIC Card modules.

Although we didn't review them, we did note that we can also use other electronic formats, such as DocuSign.

## Signature 3

Go ahead and capture the representative's signature. Click anywhere for hints.

<no audio> Capture the rep's signature. Click anywhere for hints.

<audio – hint> Click the Capture Signature button or press the Enter key on the keyboard.

## Signature 4

The same statement displays on the sig pad for the representative.

<no audio> The representative taps the Next button on the sig pad.

## Signature 5

<no audio> The representative's signature displays on the modal.

## Signature 6

<no audio> The representative taps the Next button on the sig pad.

## Signature 7

<no audio> Capture the rep's signature. Click anywhere for hints.

<audio – hint> Click the Save Signature button or press the Enter key on the keyboard.

## Signature 8

Next, we capture the certifier's signature.

This person is the staff member who clicks either the Issue Benefits or Complete Certification link at the end of the cert and should reflect the primary certifier.

The statement reads: this signature indicates the staff member has verified the participant's information, appropriately documented this information, and accurately determined the participant's eligibility status.

Go ahead and click the buttons as we sign the sig pad.

## Signature 9

The next statement, which displays on the sig pad's screen, reads: I have determined the participant eligibility/ineligibility for the WIC Program.

Once we sign...

## Signature 10

...and tap the OK button on the sig pad...

## Signature 11

...we can save our signature.

## <Waiting>

<screen description – no audio> Spin icon displays.

## End Cert 3

The Certification Mode closes, and we are returned to the Demographics page, where the folder has been unlocked.

## <Transition Slide>

<screen description – no audio> Slide transitions to Signature Capture modal for Mander household.

## Signature 12

Regardless of the number of household members being certified, the representative and certifier only have to sign the sig pad once each.

As shown with the Mander family, once Sallie's cert was completed and the signatures captured, when Geri's cert was completed, the Capture Signature modal displayed with the previously captured signatures automatically populated and the Save Signature button our focus.

## <Transition Slide>

<screen description – no audio> Slide transitions to Signature Capture modal with certifier's signature.

## Signature 13

This occurs for each certification completed on the same date for any subsequently certified members of a household.

## <Transition Slide>

<screen description – no audio> Slide transitions to Beau Vine's Demographics page.

## Multiple PFDTU Msg 1

Issue Benefits is included in the certification process because Federal Regulations require at least one set of benefits be issued to participants when certified, except for fully breastfed infants less than 6 months old.

Go ahead and select Issue Benefits from the sidebar.

## <Waiting>

<screen description – no audio> Working...please wait and spin icon displays.

## Multiple PFDTU Msg 2

As long as we open Issue Benefits on the same date as the certification, if the participant or household wasn't issued the previous month's benefits, and the first date of their cycle for the

current month is still in the future, the system will display the Multiple PFDTU Dates Available modal.

### Multiple PFDTU Msg 3

This allows us to select whether we issue a prorated late set of benefits with the Printed First Date to Use on the first date of their cycle in the previous month.

Selecting late issuance means they will be included in the Participation Count for the previous month.

Or issue a partial package that begins today to sync them to their current benefit cycle, which means they will not be counted for the previous month.

### Multiple PFDTU Msg 4

Best practice is to always select late issuance to ensure participants do not miss out on food benefits and are counted for the previous month.

Let's do that.

Click the PFDTU dropdown.

### Multiple PFDTU Msg 5

Select the August PFDTU of 8/12.

### Multiple PFDTU Msg 6

Click OK.

<no audio> Click the OK button.

### <Waiting>

<screen description – no audio> Working...please wait and spin icon displays.

### Maintains Cycle 1

We should note that, WINNIE will maintain the household's benefit cycle and does not create a different cycle based on the cert date, even if there is a large gap between their last Cert End Date and their new Cert Start Date.

### Affidavit Reminder 1

As a reminder, at the end of a certification, if we selected Waiver Signed to indicate a situation in which the household is unable to provide any proof of income, residency, or identification,

we must complete the Multipurpose Affidavit – Waiver of Proof found in Documents under Clinic Actions in the sidebar.

This document must be scanned or imported into all applicable household members' folders. Information about this form was provided in the Participant Menu training modules.

### <Transition Slide>

And speaking of forms...

<screen description – no audio> Slide transitions to topic page.

### Manual Cert Forms 1

...we need to mention that in the MN Operations Manual (MOM), there are manual certification forms available on the MDH WIC website that could be used if the Internet were to go down or we are unable to access WINNIE for some reason.

They are exhibits 5ii 1, 2, and 3 for certifying infants and children, women, and documenting proof of eligibility.

### <Transition Slide>

<screen description – no audio> Slide transitions to Bloodwork page.

### After Cert 1

In WINNIE, we can update or modify information in the Participant Folder on the same date it is created after completing the certification.

As we can see the Edit icon is enabled.

Go ahead and select Length/Height/Weight from the sidebar.

### After Cert 2

Again, the Edit icon is enabled.

### <Transition Slide>

<screen description – no audio> Slide transitions to Length/Height/Weight page with referral information.

### After Cert 3

For referral information where the Measurement Date is another date, as long as the record itself was created today, we can edit it.

## After Cert 4

This may seem obvious, but sometimes when the system allows something, it doesn't always occur to us that we shouldn't do it...

If a Delete icon is enabled, we should **never** delete a record associated with a certification.

We can edit, but never delete.

## <Transition Slide>

<screen description – no audio> Slide transitions to Search page.

## Show Details 1

Once the cert is completed, the date it was completed (or the Cert Effective Date) and the calculated end date, which since Beau is turning 5 years old is in June, display in the Details card on the Search page.

## End Cert Info

This concludes our review of Certification.

## <Transition Slide>

<screen description – no audio> Slide transitions to Test Your Knowledge page.

## Test Your Knowledge

### True/False Q#1

The Multiple PFDTU Dates Available modal displays if the participant being certified has not received benefits with a PFDTU in the current month.

### Answer #1

The answer is False.

The Multiple PFDTU Dates Available modal displays if the participant has not received benefits with a **PFDTU in the last month**, their PFDTU for this month is in the future and they are eligible for late issuance.

### Multiple Choice Q#2 (single answer)

Which statement is false?

## CERTIFICATION 1D

- A. There are manual certification forms available in MOM if we are unable to use the Internet or access WINNIE.
- B. Since the system allows us to, we can delete records created during the certification in the Participant Folder on the same date as they were created.
- C. We can edit referral information in the Participant Folder, after completing a cert, as long as it is the same date the record was created.
- D. The participant/representative and CPA only have to sign the signature pad once even if multiple members of the household are being certified on the same date.
- E. The Priority and Cert End Date are both calculated by the system during the certification's end process.

### Answer #2

The answer is B.

On some pages in the Participant Folder, after a certification has been completed, the delete icon may be available for records created today. Despite this, we should **never delete** a record associated with a certification.

## End

### End Slide

Thank you for reviewing this WINNIE online training module presented by the Minnesota Department of Health WIC Program.

If you have any feedback, comments, or questions about the information provided, please submit the [WINNIE Questions for the State WIC Office](#) form.

*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](mailto:health.wic@state.mn.us), [www.health.state.mn.us](http://www.health.state.mn.us); to obtain this information in a different format, call: 1-800-657-3942.*

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