

# Mid-Certification Assessment (MCA) – WINNIE Online Training Module

MONTH YEAR

## Introduction

### Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It's an overview of Mid-Certification Assessments or MCAs in WINNIE, the MN WIC Information System.

### Date

All dates in this module are based on today's date being September 15, 2023.

### Overview 1

Mid-certification Assessments, often referred to as MCAs or Midcerts, are required nutrition assessment appointments for infants, children, and breastfeeding women.

### <Transition Slide>

<screen description – no audio> Slide transitions to Search page with Ticke household displayed.

### Overview 2

WINNIE calculates the MCA Due Date during the complete Certification process.

### Child MCA 1

For children, 6 months is added to their Cert Start Date.

Their MCA can be completed earlier or later to sync with other household appointments, but in general, should be completed between 5 and 7 months.

Go ahead and click on Polly's card.

### Infant MCA 1

For infants, 9 months is added to their Date of Birth.

## MID-CERTIFICATION ASSESSMENT (MCA)

The MCA should be completed on or after an infant turns 9 months old in order to coincide with bloodwork policy, which states that bloodwork must be tested at or after 9 months of age, and not before.

### Infant MCA 2

Since infants certified at or after 6 months of age are only certified for 6 months, the system will not calculate an MCA Due Date, and one is not required.

However, despite not being required, it may still be appropriate to assess measurements and bloodwork during the certification based on the infant's nutrition and health status.

### Infant MCA 3

For infants, the MCA can be completed anytime between 9 and 11 months.

Go ahead and click on Fran's card.

### BF Woman MCA 1

The MCA is required for all breastfeeding women, including some-breastfeeding women who are no longer receiving food benefits.

### BF Woman MCA 2

Like children, their Due Date is also 6 months from the Cert Start Date, but it can be completed at the same time as her infant's MCA.

Whether the MCA is completed for all breastfeeding women at 6 months or with the infant's MCA at 9 months is determined by our own agency's policy.

### BF Woman MCA 3

If mom's WIC Category changes to non-breastfeeding before 6 months postpartum, WINNIE will remove the MCA Due Date. <let fade out before double-click statement>

Go ahead and double-click on Roman's card to open his Participant Folder.

### <Waiting>

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

### MCA Alert 1

A System Alert starts displaying for each household member due for an MCA 4 months before the due date as a reminder to schedule the appointment.

It will continue to display until the MCA has been completed.

## MCA Alert 2

Once an infant is 9 months old, a second alert displays indicating that bloodwork is required before the first birthday.

Go ahead and close the alert.

## Start MCA 1

Let's collapse Clinic Actions on the sidebar.

## Start MCA 2

We start an MCA the same way we start a cert, by selecting Begin Certification.

Go ahead and do that.

<no audio> Select Begin Certification from the sidebar.

## Cert Type Modal 1

As we saw before, if the system isn't sure what we are trying to start, the Certification Type modal displays.

This time we'll select the Mid-Certification Assessment button then click Continue.

## Cert Type Modal 2

<no audio> Select the Mid-Certification Assessment button then click Continue.

## 60 Day Error 1

If we recall from Show Details, Roman was certified in June so his MCA isn't due until December.

There is a lot of flexibility around completing the MCA, but the one validation WINNIE has for all WIC Categories is that it cannot be started more than 60 days before the Due Date.

Click the OK button on the message.

## Start MCA 3

Both Fran and Polly are actually due for an MCA this month.

Go ahead and select Polly from the Participant Menu.

## Start MCA 4

<no audio> Select Polly from the Participant Menu.

## <Waiting>

<screen description – no audio> Spin icon displays.

## Start MCA 5

Go ahead and start an MCA for Polly.

<audio – hint> Select Begin Certification on the sidebar.

## Start MCA 6

<no audio> Start an MCA for Polly.

<audio – hint> Click the Mid-Certification Assessment button.

## Start MCA 7

<no audio> Start an MCA for Polly.

<audio – hint> Click the Continue button.

## <Waiting>

<screen description – no audio> Spin icon displays.

## MCA Mode 1

The Mid-Certification Assessment Mode is very similar to Certification Mode.

It opens to Demographics.

The banner and Close button display on the top of each page.

The Participant Folder is collapsed and locked.

Pages are listed in the preferred order for completion, and each page has a checkbox, and a checkmark displays when a record has been saved.

Pages required by the system have a red tab.

Issue Benefits is disabled under Benefits Management and clicking either Issue Benefits or Complete Certification triggers completion of the MCA and assessment of requirements.

Go ahead and select Complete Certification on the sidebar.

## <Waiting>

<screen description – no audio> Spin icon displays.

## Review Cert 1

The same Review Certification for Errors modal displays any unmet requirements.

For MCAs, there is only one requirement regulated by the system, bloodwork.

The key words there are by the system.

Go ahead and click the Close button.

## Requirements 1

Although WINNIE will allow us to complete the MCA with just a blood record, in order to meet the Federal requirements that allow us to certify infants, children, and breastfeeding women for one year, all of the following must also be completed as appropriate.

Height and weight measurements, an abbreviated health and nutrition assessment, nutrition counseling or education, referrals if needed, food package review, an immunizations check, and breastfeeding promotion and support.

If an MCA is missed, policy requires we only issue one month of benefits until the MCA is completed.

Again, this is not enforced by the system.

A lot can happen in one year, so it is our responsibility to ensure this health and nutrition check occurs.

## Requirements 2

For MCAs, we are not required to verify or document proofs, income, or physical presence.

## Participant Menu 1

The Participant Menu...go ahead and open it...

<no audio> Open the Participant Menu.

## Participant Menu 2

...also functions the same.

Add Member and Change Household ID are disabled, and we can access Manage Alerts.

We can select other members and it will close the MCA mode, lock their folder, and open the other member's Participant Folders.

We can close the MCA Mode at any time.

Go ahead and click the Close button.

## PF Locked 1

The Participant folder is locked until the MCA is completed or removed.

Let's collapse Clinic Actions again.

## Remove MCA 1

Our options are the same as the cert, Resume or Remove Incomplete.

Let's remove the incomplete MCA.

<no audio> Select Remove Incomplete MCA from the sidebar.

## Remove MCA 2

The message informs us that the MCA attempt will be removed, and information collected won't be saved.

Like when removing the cert, this is mostly true.

Click the Yes button.

## <Waiting>

<screen description – no audio> Spin icon displays.

## Remove MCA 3

Removing the MCA attempt unlocks the participant folder.

## Remove MCA 4

When an MCA is removed, if any of the following were added or updated during the MCA, the changes are reverted: bloodwork, measurements, nutrition assessment, nutrition education (which includes all contacts), referrals, risk factors, and SOAP Notes.

These changes are kept: Demographics and Household Demographics, Health Information for all WIC categories, Issuance Frequency, and Manage eWIC Account.

We should note that these lists only include the information that should, or may, typically be completed for an MCA.

## Enter PF 1

Like certs, we can enter information into the Participant Folder prior to starting the MCA.

In general, it's always best practice to enter information when in Mid-Certification Assessment Mode.

## Enter PF 2

However, sometimes clinic flow lends itself to entering some information into the Participant Folder beforehand.

In WINNIE, if certain information is entered **on the same date as the MCA is started**, the system will recognize the record as meeting the MCA requirement for a checkmark.

Since bloodwork is the only system requirement, we'll show that as an example.

Select Bloodwork from the sidebar.

## Bloodwork 1

The bloodwork was added by our co-worker earlier, along with length and weight provided from Polly's doctor's visit on Monday.

Let's take a look at that as well.

Select Length/Height/Weight from the sidebar.

WIC STAFF: I added her hemoglobin. I also added the length and weight mom brought with her from Polly's doctor's visit on Monday.

## Referral Info 1

Notice the length and weight were referral measurements from 9/11 and her Medical Clinic.

Like certs, we can start a new MCA on the same date as an MCA was removed.

Go ahead and collapse the Clinic Actions and start another MCA for Polly.

## Start New MCA 1-3

<no audio> Collapse the Clinic Actions and start another MCA for Polly.

## <Waiting>

<screen description – no audio> Spin icon displays.

## Start New MCA 4

Information entered into the Participant Folder on the same date as the MCA works exactly like certifications; to get the checkmark, we simply have to open the page.

Select Bloodwork from the sidebar.

## Bloodwork 2

Since the measurement is from today, the checkmark displays as soon as we open Bloodwork. Select Length/Height/Weight on the sidebar.

## Referral Info 2

Polly's growth measurements were referral information from her doctor's visit on 9/11.

Just like with certifications, if the measurement date is not the same as the date the MCA was started, it requires extra steps to get the checkmark.

## Referral Info 3

We learned those steps in a cert training module. Do we remember them?

Go ahead and do what needs to be done to get the checkmark for the referral measurements. Click anywhere for a hint.

<no audio> Get the checkmark to display for the referral measurements. Click anywhere for a hint.

<audio – hint> Click the Edit icon.

## Referral Info 4

<no audio> Get the checkmark to display for the referral measurements. Click anywhere for a hint.

<audio – hint> Click the Save button.

## Referral Info 5

We've completed some of the non-system-required requirements behind the scenes.

Let's talk briefly about a few other pages in the MCA.

Select Demographics from the sidebar.

## Demographics 1

Although nothing is required in Demographics to complete the MCA, best practice is to double-check we still have the correct address and telephone.

If we don't make any changes requiring us to save the page, we won't receive a checkmark, which is just fine.

## Demographics 2

If we do click Save, any agency-required fields will need to be completed.

Select Risk Factors from the sidebar.

## Risk Factors 1

WINNIE assesses and assigns risk factors during the MCA.

However, we do not need to assess or assign risk factors as part of the MCA.

Risk Factor assignment is only required for certifications.

Select Food Prescription from the sidebar.

## <Waiting>

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

## Food Prescription 1

When the Food Prescription page is opened while in MCA Mode, WINNIE creates a default food package based on WIC category, breastfeeding amount, risk factors, and age, which is why the Select Formula modal opens for an infant.

Go ahead and select powdered Enfamil Infant from the Food Item dropdown and click the Save button.

WIC STAFF: Are you still using the Enfamil Infant powdered formula?

## Food Prescription 2-3

<no audio> Select powdered Enfamil Infant from the Food Item dropdown the click the Save button.

## <Waiting>

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

## Food Prescription 4

Like when in Certification Mode, it also creates default food packages for any age category changes that will occur before the Cert End Date.

If Polly didn't already have a child food package with an Effective Date of her first birthday, the system created one today.

Collapse this food package card by clicking on the Effective Date or the Toggle Accordion icon in the header.

## Food Prescription 5

As well as an infant default food package with an Effective Date of today.

## Complete MCA 1

We've completed our MCA and we should note that there is flexibility in what we may choose to complete while in MCA Mode, and while following our agency guidelines, what we might document or complete once we've closed the MCA.

For instance, we may choose to document our Nutrition Ed or Referrals, or complete a SOAP Note, once we've completed the MCA.

## Complete MCA 2

Since we would still need to complete Fran's MCA, we're going to click Complete Certification on the sidebar.

## Complete MCA 3

We are not determining eligibility during the MCA, so the participant or representative does not review the Rights & Responsibilities, and we do not capture any signatures.

We simply click OK on the Success message.

## After MCA 1

Again, like certs, we can update or modify information previously entered while in MCA Mode on the same date it was created in the Participant Folder.

Go ahead and select Bloodwork from the sidebar.

## Bloodwork 3

The Edit icon is enabled.

Select Length/Height/Weight from the sidebar.

## Referral Info 6

We can edit if the Measurement Date is another date, as long as the record itself was created today.

Select Nutrition Assessment from the sidebar.

## Nutrition Assessment 1

If the Delete icon is enabled, we should **never** delete a record associated with a certification or MCA. We can edit, but never delete.

We're going to look at one last page. Navigate back to the Search page, display Show Details, and select Polly's card.

## Show Details 1-2

<no audio> Navigate back to the Search page, display Show Details, and select Polly's card.

## Show Details 3

Once the MCA is completed, the date displays in the Details card.

That concludes our review of the Mid-certification Assessment.

## <Transition Slide>

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

## Test Your Knowledge

### T/F Q#1

True or False?

We only have to complete bloodwork for an MCA, since that is the only system requirement when in Mid-Certification Assessment Mode.

### Answer #1

The answer is False.

Although WINNIE may only require bloodwork, Federal regulations and MN WIC policy require height/weight, a health and nutrition assessment, nutrition counseling/education, a food package review, as well as an immunizations check, referrals, and breastfeeding promotion and support as appropriate.

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

Which statement is false?

- A. If an MCA is missed, we should still issue tri-monthly since it doesn't impact eligibility.
- B. There is flexibility in which pages of the MCA have to be completed while in MCA Mode.

## MID-CERTIFICATION ASSESSMENT (MCA)

- C. We can edit records in the Participant Folder after completing the MCA as long as it's on the same date they were created.
- D. Changes or updates to Health Information (for all WIC Categories) are not reverted if the incomplete MCA is removed.
- E. Bloodwork can be entered on the same date, in the Participant Folder, prior to starting the MCA and the MCA will check the box once the page is opened while in MCA Mode.

### Answer #2

The answer is A.

MCAs are required for infants, children, and breastfeeding women. If the MCA is missed, and we are unable to reschedule until the following month, we should issue only one month of benefits until the MCA can be completed.

### 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.

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