

Participant Menu 2 – WINNIE Online Training Module

MARCH 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It's the second module providing an overview of some of the functions in the Participant Menu in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being March 16, 2023.

Actions Menu Continued

Proofs

<Transition Slide>

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

Open Menu 1

Let's continue reviewing the functions in the Participant Menu.

Go ahead and open the menu again.

<failure message – audio> Click the participant information in the top right corner of the page.

Proofs

We're going to look at Proofs. Go ahead and select it.

<no audio> Select Proofs.

<Waiting>

<screen description – no audio> Spin icon displays.

Residence

Applicants and participants must live in Minnesota to receive WIC benefits in Minnesota.

Proof of Residence is household-level information that we are required to collect for each member during a certification appointment.

By selecting from the dropdown, we are indicating that we reviewed the proof, physical or electronic.

We are not required to keep any other proof that this information was provided.

We should note that electronic information submitted to our WIC Program as proof must always be deleted or destroyed.

Once selected it will automatically display for other household members being certified on the same date or within the next 92 days.

Click the Proof of Residence dropdown.

Pending Proof 1

We'll just highlight a couple of the options.

We select PENDING PROOF if the participant is unable to provide proof of residence at the time of their certification.

Upon completion of their cert, the participant is considered temporarily eligible for WIC and only one month of benefits can be issued.

The participant is **required** to provide residency proof prior to being issued any more benefits and we can update the proof in the Participant Folder when it's provided.

When we select PENDING PROOF, the system does two things:

- It limits benefit issuance to one month and will not allow further issuance until a valid Proof of Residence has been selected.

<Transition Slide>

<screen description – no audio> Slide transitions from Proofs modal to Display Alerts modal with issuance limited to one month due to pending proof.

Pending Issuance

As we can see in Rosie Cheek's folder.

Click the button to continue.

Pending Proof 2

- It creates a system alert that displays when one of the household's participant folders is opened from the search page.

<Transition Slide>

<screen description – no audio> Slide transitions from Proofs modal to Display Alerts modal with system alert that reads: "No proof of residency was found. Review the Proofs modal."

Pending Alert

Click the button to continue.

Known to Staff

Known to Staff can only be selected as Proof of Residence at subsequent certifications, or recertifications.

Even if we have personal knowledge of where a participant, or their family, lives we cannot select Known to Staff **if this is the very first time this particular member of the household has been certified** for WIC in Minnesota.

Other – Write Note

The Other – Write Note option can be used for families enrolled in the *Safe at Home* program, a statewide Address Confidentiality Service.

This is also the only circumstance whereby a PO Box can be used for the residential address.

If selected, we must document the appropriate information in a note.

We have one more option to review.

Click below the scroll bar.

Waiver Signed ID

We select Waiver Signed to indicate that the participant is currently in a situation in which they are **unable** to provide any proof of residency.

This should be a very rare occurrence and is usually a result of fire, theft, disaster, migrancy, homelessness, or can occur if another individual is obstructing them from providing proof, such as a landlord who won't write a statement documenting their residency.

If Waiver Signed is selected, we must complete the Multipurpose Affidavit – Waiver of Proof, which we may recognize from our brief tour of Documents under Clinic Actions in the sidebar.

<Transition Slide

<screen description – no audio> Slide transitions from Proofs modal to Multipurpose Affidavit – Waiver of Proof document.

Waiver

We must complete the Multipurpose Affidavit – Waiver of Proof including the appointment date, Household ID, State WIC IDs for all members being certified, check-off Residency, include the reason why the proof could not be provided, and have the participant or the person who brought the infant or child to WIC, often called a **proxy**, sign and print their name.

Once completed, the document should be scanned into the folders of all household members that were certified.

Information about generating and scanning documents will be provided in the appropriate training modules.

Click the button to continue.

Homeless

The Proof of Residence field is handled differently for homeless participants as we can see in Nessa Sary's folder.

The address fields are still required when a participant is homeless, and we'll provide more information about how to handle that situation when we look at homeless in the Demographics training module.

Not Required

<screen description – no audio> Slide transitions to Nessa Sary's Proofs modal.

For now, it's important to note that Proof of Residence is completely disabled when Homeless is toggled on we are not required to complete it.

Click the button to continue.

Identity

Applicants and participants must also provide proof of identification at each certification, and a lot of the functionality, and options, are like Proof of Residence.

NOTE: Proof of Identity is also required for the person who brings an infant or child to WIC, again often called a **proxy**, even if they are not personally participating in the WIC Program. However, this is not documented in the system.

By selecting from the dropdown, we are indicating that we reviewed the proof, physical or electronic, was provided and we are not required to keep any other proof.

NOTE: This bears repeating, we do not keep electronic proofs. They should always be destroyed or deleted.

Go ahead and click the Proof of Identification dropdown.

Pending Proof ID

PENDING PROOF of Identification works the same as when selected for Proof of Residence.

We select PENDING PROOF if the participant is unable to provide proof of their identity when certified, and upon completion of their cert, the participant is considered temporarily eligible for WIC and only eligible for one month of benefits.

Proof of Identification must be verified and updated in the Participant Folder before issuing any more benefits.

For PENDING PROOF of ID, the system also:

- Limits issuance to one month in Issue Benefits until another proof is selected.
- Creates a system alert.

Known to Staff

Again, Known to Staff is only acceptable at subsequent certifications, or recerts, if we visually and personally recognize a participant.

WIC Card

WIC Card can only be used for recertification.

Even if we know the participant, or their family, we cannot select WIC Card if this is the very first time we've certified this particular member of the household.

Click below the scroll bar.

Waiver Signed ID

Like Proof of Residency, we only select Waiver Signed to indicate that the participant is currently in a situation in which they are **unable** to provide any proof of their identity.

This should be very rare and is usually a result of fire, theft, disaster, migrancy, homelessness, or can occur if someone is obstructing them from providing proof, such as a spouse or partner who won't provide the birth certificate for a child.

<Transition Slide>

<screen description – no audio> Slide transitions from Proofs modal to completed Multipurpose Affidavit – Waiver of Proof

Waiver ID

Once we complete the Multipurpose Affidavit – Waiver of Proof and scan it into the appropriate household members' folders.

Only one waiver is necessary for all household members being certified at one time and it can be used to waive multiple proofs.

Click the button to continue.

<no audio> Information about generating and scanning documents will be provided in the appropriate training modules.

Close Proofs 1

Click the dropdown to close it.

Close Proofs 2

Click Cancel to close the modal.

<Transition Slide>

<screen description – no audio> Slide transitions from Demographics to topic slide.

Policy 1 – Start Here

For more information about the policy referenced in this section, please refer to the MN Operations Manual, or MOM, on the MDH WIC website.:

<https://www.health.state.mn.us/people/wic/localagency/mom.html>

5. Certification, 5.2.2 Residency:

https://www.health.state.mn.us/docs/people/wic/localagency/program/mom/chsctns/ch5/sctn5_2_2.pdf

5. Certification, 5.2.3 Identity:

https://www.health.state.mn.us/docs/people/wic/localagency/program/mom/chsctns/ch5/sctn5_2_3.pdf

Click the button to continue.

Race / Ethnicity

<Transition Slide>

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

Open Menu 2

Open the participant menu again.

<failure message – audio> Click the participant information in the top right corner of the page.

Race/Ethnicity

We are required to collect Race and Ethnicity for each participant the first time they are certified and they should be self-selected by the participant or proxy.

Select Race/Ethnicity.

Ethnicity

Click the Ethnicity dropdown.

Ethnicity Options

Our options are Hispanic or Latino and Not Hispanic or Latino.

Click the dropdown to close it.

Race Dropdown 1

The Race field, which allows multiple selections, is a dropdown that functions a little differently.

When we hover over it, an x displays on the right.

Go ahead and hover over the field.

<no audio> Hover mouse over Race field.

Click the button to continue.

Race Dropdown 2

If we click inside the field...

<no audio> Click inside the Race field.

Race Dropdown 3

..the other options not yet selected for Race display.

Let's select Asian.

Race Dropdown 4

Once we have more than one selection, the x to the far right remains and can be used to delete all selections at once.

The x next to the race is used to delete just the single selection.

American Indian 1

Click the Race dropdown again and select American Indian or Alaskan Native.

<hint – audio> Click the Race dropdown again.

American Indian 2

<hint – audio> Select American Indian or Alaskan Native.

American Indian 3

When American Indian or Alaskan Native is selected, the Tribe dropdown displays, and a selection is required.

Click the Tribe dropdown.

Tribe Dropdown

Although required, our Local Agency can choose whether to ask about tribal affiliation.

If our agency chooses not to collect this, we select Other.

If our agency does collect this, the participant can choose whether to self-select their tribal affiliation.

If they choose not to, we select Participant Declined.

Delete Race 1

Let's delete American Indian or Alaskan Native.

Click anywhere for a hint.

<hint – audio> Click the x next to American Indian or Alaskan Native.

Delete Race 2

Go ahead and delete Asian also.

Click for a hint.

<failure message – audio> Click the x in the box next to Asian.

Cancel Race

Click the Cancel button to close the modal.

<Transition Slide>

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

Status Information

<Transition Slide>

<screen description – no audio> Slide transitions from topic slide to Demographics page

Open Menu 3

Let's open the participant menu one last time.

<failure message – audio> Click the participant information in the top right corner of the page.

Status

Status Information is our last function not described in another training module.

Go ahead and select it.

<no audio> Select Status Information.

Status Info

This modal provides some information not found elsewhere.

We are already familiar with the Termination Date and Reason.

The Application Date is the date the participant was Prescreened, or their record was first created.

Although WINNIE has the capability of creating a Waiting List, this function is not currently used.

Priority

The WIC Priority is auto-assigned by the system based on WIC Category and the Risk Factors assigned.

Priorities are 1-7, with 1 being the highest.

A priority, once assigned, cannot be decreased during a certification period.

The Priority becomes more important if we ever do use a waiting list.

Ineligibility

Ineligibility is determined during certification or as a result of a household income record impacting other certified members.

It is much less common than Terminations.

Participant Menu

A few modals in WINNIE have Participant Menus.

Click the menu.

<no audio> Click the Participant Menu.

Other HH Mbrs

Like the Participant Menu in the folder, this menu also has the Other Household Members section, and includes all household members except for children over 5 who are categorically ineligible.

It allows us to quickly review other household members' status information without switching folders.

Select Moe.

Terminated

We can see Moe's current status is terminated for categorical ineligibility.

Let's look at Linna's status. Go ahead.

Click anywhere for a hint.

<hint – audio> Click the Participant Menu.

Other Member

<hint – audio> Select Linna from the menu.

Close Status

That's all there is.

Click the Close button.

Last Slide

Click the button to continue.

Test Your Knowledge

Multiple Choice Q#1 (multi-select)

Multiple Choice – select all that apply.

For Proof of Residence...

- A. Once selected it will display for any other household members certified on the same date.
- B. Once selected it will display for any other household members certified for the next 62 days.
- C. By selecting from the dropdown we are indicating that proof was provided and that we reviewed it.
- D. We should scan the provided proof into the folder.
- E. Proof of Residence is a household-level field we collect individually for each member at certification.

Answer #1

The answers are A, C, and E.

Proof of Residence is a household-level field that we collect for each member of a household at certification. However, once selected it will display for any other household members certified on the same date and for the next **92** (not 62 – answer B) days. By selecting from the dropdown, we are indicating that proof was provided and that we reviewed it. We should never scan the provided proof into the folder.

Multiple Choice Q#2 (multi-select)

Multiple Choice – select all that apply.

When we select PENDING PROOF...

- A. It is because the participant is unable to provide proof as a result of fire, theft, disaster, migrancy, homelessness or due to an individual impeding their ability to provide proof.
- B. The participant is temporarily eligible.
- C. The system will allow only one set of benefits to be issued. Proof must be selected before more benefits can be issued.
- D. We must complete a waiver.
- E. The participant can provide proof but not at the time of the certification.

Answer #2

The answers are B, C, and E.

PENDING PROOF occurs when the participant can provide proof but not at the time of the cert. They are considered temporarily eligible, and the system will limit issuance to one month of benefits until proof is verified and selected.

T/F Q#3

True or False.

Electronic information submitted to our WIC Program as proof should always be scanned into the participants' folders.

Answer #3

The answer is false.

Electronic information submitted to our WIC Program as proof should always be deleted or destroyed.

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, www.health.state.mn.us; to obtain this information in a different format, call: 1-800-657-3942.

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