

# Transfers 1B – Agency-to-Agency – WINNIE Online Training Module

JANUARY 2024

## Introduction

### Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is an overview of transferring participants between agencies in WINNIE, the MN WIC Information System.

### Overview 1

We can also transfer participants between agencies.

This is often referred to as an in-state transfer.

Adult participants or the parent/guardian must show proof of both their identity and their current residence, which we will document in a General Note with the subject of Transfer Information.

### Overview 2

If the family is unable to provide one or both of these proofs at the time of the transfer and we are issuing benefits, we should issue only one month and create a priority alert to inform the next staff person what needs to be verified before more benefits can be issued.

If the family cannot provide proof at all, we would complete the waiver, the Multi-Purpose Affidavit.

### Overview 3

Reference for this information is MOM, Section 3.3 Transferring Participants in the In-State Transfers section.

### Date

All dates in this module are based on today's date being February 1, 2024.

### <Transition Slide>

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

## Scenario 1

Here's our scenario.

We are answering phones at the Hennepin County HSB Clinic site.

Paris Blue called because she and her family have moved from Dakota to Hennepin County.

PARTICIPANT: "Hi! My name is Paris Blue and my family just moved from Dakota to Hennepin County and I need to change where I go for WIC."

WIC STAFF: I'm glad you called!

## Scenario 2

When she told the Dakota WIC staff they were moving they let her know that she would need to provide proof of her identity and her new residence when Hennepin transferred her family to their county.

Since she has the information on-hand and uses the WIC App, we can have her submit it using the App once we've transferred her family to our agency.

PARTICIPANT: "Before we moved, the WIC people told me that I'd need to show you my ID and my new address. I have that right here."

WIC STAFF: Great! Do you use the WIC App?

PARTICIPANT: "Yep"

WIC STAFF: Nice! We'll have you send it to use using the WIC App once we get you transferred to Hennepin.

## Change Clinics 1

Paris also said that she knows there is a clinic close to her new home located on East Lake Street, which is our South Clinic.

If we want to transfer them to our South Clinic, what should we do first? Click anywhere for a hint.

<audio – hint> Click the Clinic dropdown in the header.

PARTICIPANT: "I know there is a WIC close to our new home that is on East Lake Street."

WIC STAFF: Yes! That is our South Clinic.

## Change Clinics 2

<no audio> If we want to transfer them to our South Clinic, what should we do first? Click anywhere for a hint.

<audio – hint> Select 089 - South.

## Agency Transfer 1

Now that we are working in the right clinic, we've asked Paris for her Household ID and jotted it down.

WIC STAFF: Can you tell me your Household ID? It should be written on the back of your WIC Card.

## Agency Transfer 2

Go ahead and look up Household ID 13694286. Click anywhere for a hint.

<audio – hint> Since we are transferring from another agency, we want to search Statewide. Click the Statewide button.

## Agency Transfer 3

We are not going to use the Agency dropdown.

<no audio> Look up Household ID 13694286. Click anywhere for a hint.

<audio – hint> Click inside the Household ID field.

## Agency Transfer 4

<no audio> Look up Household ID 13694286. Click anywhere for a hint.

<audio – hint> Type 13694286.

## Agency Transfer 5

<no audio> Look up Household ID 13694286. Click anywhere for a hint.

<audio – hint> Click the Search button or press the Enter key.

## Agency Transfer 6

They currently belong to Agency 161 – Dakota and Clinic 229.

As always, we should view Show Details.

Toggle it on then collapse the Search Criteria card.

## Agency Transfer 7

<no audio> Toggle it on then collapse the Search Criteria card.

<no audio> Click to collapse.

## Delete Appointments

As a reminder, if anyone in the family has an appointment scheduled at the agency they are transferring from, best practice is to always delete that appointment in the Appointments page in one of their participant folders since it does not automatically delete when we transfer the household.

By deleting these appointments, we are helping to keep no-show rates down and opening up appointments for other participants and households that still belong to the agency they transferred from.

## Agency Transfer 7A

OK. Moving on.

Chelsea was certified on July 7<sup>th</sup>, she has a Midcert due on April 4<sup>th</sup>, and her last set of benefits ended on January 4<sup>th</sup>.

Click on Marian's card then Paris' card to view their details.

## Agency Transfer 7B

<no audio> Click on Marian's card then Paris' card to view their details.

## Agency Transfer 7C

To start the transfer, we open the participant folder.

Double-click on **Chelsea's** card.

<no audio> Double-click on Chelsea's card to open her Participant Folder.

## Agency Transfer 8

The Confirm message displays again, but this time, it has a reminder to update the physical and mailing address if necessary.

Click the Yes button to continue the transfer.

## Agency Transfer 9

The same Transfer Participant(s) modal opens that we saw when transferring between clinics.

Review the information then click OK.

<no audio> Click the OK button.

<Waiting>

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

## Agency Transfer 10

The alert is still applicable. Click Close.

## Agency Transfer 11

Just an FYI...If we needed to, which in this instance we don't, we can update any of the Household Representatives' information before clicking the Send eWIC Data button.

Go ahead and do what needs to be done to complete the transfer. Click anywhere for a hint.

<audio – hint> Click the Send eWIC Data button.

WIC STAFF: Did you want to add anyone else to help you with WIC?

PARTICIPANT: "Nope. Just me is fine."

<Waiting>

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

## Agency Transfer 12

Once we completed the transfer, we had Paris submit her proof of ID and residence using the WIC App, which she already knew how to do.

WIC STAFF: OK. I'm ready to have you send your proof of ID and residence using your WIC App. Do you know how to do that?

PARTICIPANT: "Yep. I've done it before. Give me a minute..."

## Agency Transfer 12A

Since we have access to Mobile Management, we were able to download and view the documents, which our agency has set to automatically delete at the end of our workday from our Downloads folder.

We've jotted down that she sent an image of her driver's license that still had her old address, and a piece of mail with her new address, which we've also jotted down.

WIC STAFF (thought bubble 1): Since I have access to Mobile Management, I can just download and view the docs...

WIC STAFF (thought bubble 2) ...and I don't have to worry about the private data in my Downloads folder since my computer's set to automatically delete them at the end of my workday.

## Document Proofs 1

So, next steps are to document these proofs in a note for all household members being transferred and then we'll update her address.

## Document Proofs 2

We may be wondering why we aren't just documenting the ID and residence in the Participant Menu's Proofs modal?

Why a note?

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

## Document Proofs 3

Well, if we documented transfer proofs in the Proofs modal, the proofs that were selected for the certification, and a required part of that certification record, would be over-written.

We need to maintain the proofs associated with the cert as well as document proof for the transfer.

Hence, we document our transfer proofs in a General Note.

## <Transition Slide>

<screen description – no audio> Slide transitions back to the Manage eWIC Account page.

## Document Proofs 4

As we've already learned, we can create an alert and copy it to a note that can be saved into multiple family members' records.

So, we'll start with an alert.

Select Manage Alerts from the sidebar.

## <Waiting>

<screen description – no audio> Spin icon displays.

## Document Proofs 5

Click the Add button.

## Document Proofs 6

Remember, our subject doesn't transfer to the note, so we aren't going to select one.

Click into the Alert Text field and we'll quickly type our note.

## Documents Proofs 7

We want to document the proofs we reviewed, which were a driver's license for ID and mail for residence.

<screen description – no audio> ID Proof: Driver's license (old address); Residence Proof: Mail (current/new address).

## Document Proofs 8

Click the Save button.

## Document Proofs 9

The alert we want to copy is already selected.

Click the Copy to Note button.

## Document Proofs 10

Our subject is Transfer Information.

Select it from the dropdown, clicking below the scrollbar to find it.

<no audio> Select Transfer Information from the dropdown, clicking below the scrollbar to find it.

## Document Proofs 11-13

<no audio> Select Transfer Information from the dropdown, clicking below the scrollbar to find it.

## Document Proofs 14

Since all members are being transferred, we can toggle on Copy to select all.

<no audio> Toggle on Copy.

## Document Proofs 15

Click Save.

<Waiting>

<screen description – no audio> Spin icon displays.

## Documents Proofs 16

The alert has served its purpose and we no longer need it.

Go ahead and delete it.

<no audio> Delete the alert.

## Document Proofs 17

<no audio> Delete the alert.

## Document Proofs 18

Since this is a training module, we'll verify our notes.

Select Manage Notes from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

## Document Proofs 19

Yep. The note is in Chelsea's folder...

<screen description – no audio> Slide transitions to Marian's Note page.

...Marian's folder...

<screen description – no audio> Slide transitions to Paris' Note page.

...and Paris' folder.

<Transition Slide>

<screen description – no audio> Slide transitions back to Chelsea's Notes page.

## Update Address 1

Next step is to update the address, which we jotted down earlier.



Select Demographics from the sidebar.

## Update Address 2

We review in detail how to change the address in the Demographics-Household Level training module.

So, for now, we'll just walk through the steps with very little explanation.

Click below the scroll bar.

## Update Address 3

Click the Edit button.

## Update Address 4

Click three times into the Address field to highlight it.

## Update Address 5-6

<no audio> Click three times into the Address field to highlight it.

## Update Address 7

Type: 456 Nowhere Road exactly as shown.

## Update Address 8

Click the County dropdown, click below the scrollbar, and select Hennepin.

## Update Address 9-10

<no audio> Click the County dropdown, click below the scrollbar, and select Hennepin.

## Update Address 11

Click the City dropdown, click below the scrollbar, and select Minneapolis.

## Update Address 12-13

<no audio> Click the City dropdown, click below the scrollbar, and select Minneapolis.

## Update Address 14

Click the Zip Code dropdown and select 55407.

## Update Address 15

<no audio> Click the Zip Code dropdown and select 55407.

## Update Address 16

Once we've confirmed that their mailing address is the same as their residential address, we can click the Copy Physical Address button.

## Update Address 17

And, click the Save button.

## Update Address 18

In order to update our mailing address, we must first communicate the change to the WIC Processor.

Select Manage eWIC Account from the sidebar.

## Update Address 19

A reminder message to communicate the change displays.

Click OK.

<no audio> Click the OK button.

## <Waiting>

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

## Update Address 20

Go ahead and click the Send eWIC Data button.

## <Waiting>

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

## Finish Transfer 1

<screen description – no audio> Green banner displays that reads "Status: Successfully updated EBA."

The rest of the agency transfer process has the same requirements as any appointment or Nutrition Visit.

Offer nutrition education, breastfeeding support, and referrals as needed.

Determine when the next nutrition visit should take place.

Verify the food prescription is correct for all members.

Issue food benefits for current and future months as appropriate.

If the previous agency has already issued benefits, and the food prescription is correct on them, we should never void the benefits just to issue from our agency so that our agency gets the count.

We should also provide a list of local vendors if that would be helpful for the family.

After all that, when we return to Search...

<no audio> Select Search.

## Conclusion

It shows the Blue family now belonging to Hennepin County's South Clinic.

This concludes our overview of transfers between agencies.

Click the button to continue.

## Test Your Knowledge

### T/F Q#1

True or False?

We should delete any future appointments scheduled at the agency a family is transferring from because the system does not automatically delete these appointments when a household is transferred.

### Answer #1

The answer is True.

Appointments scheduled at other agencies do not delete when we transfer a household to our agency.

Since we are able to delete these appointments in the Appointments page, we should always take the time to do so.

This will help keep no-show rates down and open up appointments for other participants and households that still belong to the agency they transferred from.

### Multiple Choice Q#2

Which statement is true?

We document transfer information between agencies in a General Note because...

- A. The Proofs modal is view-only between certifications.
- B. The Proofs modal isn't enabled in the Participant Menu when transferring.
- C. The Proofs modal doesn't have the right options for proofs when transferring.
- D. Updating the Proofs modal would over-write the Proofs associated with the most recent certification.
- E. None of the above are true.

## Answer #2

The answer is D.

We document transfer information in a General Note because updating the current values in the Proofs modal would over-write the Proofs recorded as part of the most recent certification.

Corrections for other answers:

A – The fields in the Proofs modal are enabled so that they can be updated if PENDING was selected during the cert.

B – The Proofs modal is enabled when transferring.

C – When transferring, the Proofs modal displays the same options as during a cert.

## 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.*

*This institution is an equal opportunity provider.*