

# WINNIE Transition Guide

VERSION 1.13

NOVEMBER 6, 2024



# Contents

WINNIE Transition Guide .....	1
Overview .....	7
Purpose of the Document .....	7
HuBERT TRANSITION .....	7
Participant Search .....	7
Direct Ship .....	7
Unable to view Documents uploaded/scanned in WINNIE. ....	8
WINNIE TRANSITION .....	8
Agencies using WINNIE <b>MUST</b> review this information for transition issues. ....	8
Incomplete Mid-Certification Assessments.....	8
Incomplete Certifications .....	8
Difference in measurement calculations.....	9
9/30/24 - Child Food Package Issued Before the Age of 1.....	9
Correspondence Preference in Household Demographics .....	10
Print Note option in Manage Notes .....	10
9/30/24 - Risk Factors Not Displaying the Correct Assignment Date.....	10
NEED ASSISTANCE? .....	11
MN WIC Help Desk .....	11
WINNIE Open Issues.....	12
This section contains open issues within WINNIE. ....	12
BENEFITS .....	12
Able to Adjust Benefits when Homeless Verified Date is greater than 30 days in the Past (URB# 198880). ....	12
Cannot Issue Benefits on Cert End Date (URB# 240270 & 240271).....	12
Direct Shipped Benefits Assumed Returned by System during Change Household ID Process (URB# 239616). ....	12
In Adjust Benefits, the Message that Displays after Voiding Current Benefits can be Misleading (URB# 199694). ....	13
9/30/24 - Unable to Issue Benefits Because Income Entered in HuBERT is Blank in WINNIE (URB# 243303). ....	13

## WINNIE TRANSITION GUIDE

Unable to Issue Benefits to a NBF Participant Turning 18 Years Old and Receiving Error Message: An Error Loading the Data Occurred (URB# 237962).....	13
10/9/24 – WINNIE Suggesting Two Sets of Benefits When Only One Set Toggled On (URB# 244195). .....	14
Wrong User Linked to Benefit Issuance (URB# 226398).....	14
BLOODWORK .....	14
Age at Measurement Displaying Invalid Gestational Age for Pregnant Women in Certification Mode (URB# 233625). .....	14
CALENDAR/RESOURCE SCHEDULE.....	14
11/5/24 – Cannot Save Recurring Holiday/Event (URB# 240362) .....	14
10/22/24 – Calendar Doesn’t Consistently Open with Default Scheduler Configuration of 30 Minutes and 2 Slots (URBs# 243208 & 224592) .....	15
9/30/24 - Appointments Do Not Transfer to New Household after Household ID Change (URBs# 242800 & 199618). .....	15
Appointments Scheduled in HuBERT Displays an Incorrect Staff Member (URB# 224691). ..	15
Cannot Reschedule and/or Delete Appointments Scheduled for “Today” (URB# 224477). ..	15
Household Appointment Blocks Do Not Indicate Appts Scheduled Within by Color (URB# 181417). .....	16
Legend on Clinic Schedule Incorrectly Displays Blue for an “Event” and Pink for a “Holiday” (URB# 209993). .....	16
9/30/24 - Unable to Change Clinic Include Toggle for Appointment Types (BUG# 238695). .....	16
CAPTURE SIGNATURE.....	16
Message Explaining What the Participant is Signing Does Not Display when Capturing a Signature (URB# 239106). .....	16
Signature Captured on Sig Pad Does Not Fully Display (URB# 241946).....	17
When Capturing a Signature for a Current Certification, an Existing Signature Displays that was Captured Prior to the Current Date (URB# 232674).....	17
CERTIFICATION.....	17
Certification End Date Incorrect for Children with a Birthday on 1 <sup>st</sup> of Month When Certifying for the Last Time Before Turning 5 Years Old (URB# 236464).....	17
DISPLAY .....	17
Mother’s WIC Category Change Modal Occasionally Not Displaying Upon First Save on Demographics Screen (URB# 197031).....	18
Sidebar Menu: Collapse/Expand Function Does Not Work as Expected (URB# 180989).....	18

WINNIE TRANSITION GUIDE

DOCUMENTS ..... 18

    The Appointment Reminder and Official Notification Documents Display the Incorrect Address (URB# 242070)..... 18

DOCUMENT IMAGING ..... 18

    Copy Documents Does Not Consistently Copy the Document to Other Selected Household Members’ Folders (URB# TBD)..... 18

    Documents Scan in Color Regardless of Color Toggle (URB# 199805)..... 19

DUPLICATE PARTICIPANT ..... 19

    Duplicate Participant Criteria is Case Sensitive (URB# 240307)..... 19

    State Defined Comparison Results Grid Not Displaying Compare Criteria Correctly in the Columns (URB# 241375) ..... 19

GROWTH GRID ..... 19

    Must Toggle “Do Not Plot” for Unknown Entries to View Pregnant Growth Grid (URB# 234875)..... 19

    Premature Grids Do Not Display for Premature Infants (URB# 227821)..... 19

    Pre-pregnancy Growth Chart Default Grid Lines Incorrect for Normal BMI 18.5-24.9 Range (URB# 238698)..... 20

HEALTH INFORMATION..... 20

    Inconsistently Receiving an Error Message When Attempting to Save Health Info Page for a Non-Breastfeeding (NBF) Woman (URB# 218645)..... 20

INCOME..... 20

    Able to Delete Itemized Income After Completing Certification from Within the Participant Folder (URB# 197531)..... 20

    Created Date for Adjunctive Eligibility Displays the Current Date Instead of Original Income Contact Date (URB# 226276)..... 21

    9/30/24 - Hourly Income Created in HuBERT Displays Incorrectly in WINNIE (URB# 233380)..... 21

    No Option to Add a Duration for All Income Frequencies (URB# 220778)..... 22

    Resolving an Adjunct Eligibility Pending Proof on the Same Day as the Certification, when there are Multiple Members Certified, is Not Updating the Proof when Edited (URB# 197826)..... 22

    Unable to Generate Account Balance if LDTU is Today and No Future Benefits (URB# 208217)..... 22

LOGIN ..... 22

    Forgot/Change Password does Not Work once the Account is Locked (URB# 209032)..... 23

WINNIE TRANSITION GUIDE

When the Reset Password Link in the Reset Password Email has Expired an "Invalid token" Message Incorrectly Displays (URB# 203556). ..... 23

MANAGE ALERTS/NOTES ..... 23

    ALERTS: The Pregnant and Breastfeeding System Alert Should Display for all Household Members Regardless of whose Folder is Opened (URB# 219163)..... 23

    Updated 9/30/24 - Copy to Note Function Does Not Properly Copy the Alert in other Household Members Notes (URB# 239373)..... 23

MATERIALS GIVEN..... 24

    Save Button for Materials Given does not Display (URB# 197480). ..... 24

MID-CERTIFICATION ASSESSMENT ..... 24

    Mid-certification Due & Complete Dates Do Not Display in Show Details (URB# 240596).. 24

    Remove Incomplete MCA is Deleting the Proofs Collected at Certification (URB# 217398). ..... 24

NUTRITION ASSESSMENT ..... 25

    Error Message if Adding Nutrition Assessment Before Completing Health Information for a BF Woman Does Not Accurately Reflect What the User Must Do (URB# 237021). ..... 25

*No Records to Display* Error Message for Child on Nutrition Assessment Page (URB# 224665). ..... 25

    Questions that are Skipped or Not Answered when Completing a Nutrition Assessment Contact Display with "Not Answered" in the Comments (URB# 217769). ..... 26

NUTRITION EDUCATION ..... 26

    10/30/24 – Previously Deactivated Goal Results Displaying in Dropdown (URB# 245293). 26

PARTICIPANT FOLDER..... 27

    Unable to Open Participant Folder if Currently Income Ineligible (URB# 226457 & 239747). ..... 27

PARTICIPANT SEARCH/TRANSFER ..... 27

    DOB Displays Incorrectly When Transferring Participant (URB# 242414). ..... 27

    Gender is Incorrect on the Participant Search Page when Searching by Appointments (URB# 224670). ..... 27

    If the Participant has an Appointment in a Clinic other than Current Selection, Results Display the Appointment Clinic, Not the Participant's Assigned Clinic (URB# 224499 & 238556). ..... 27

PEER PROGRAM ..... 28

    Staff Names are Not Consistently Displaying in the Peer Counselor Contacts (URB# 240597). ..... 28

WINNIE TRANSITION GUIDE

REPORTS.....28

- 11/6/24 – Staff IDs Not Displaying Username for New WINNIE Staff in Infoview Reports..28
- 11/6/24 - New Cert/Recert Counts Incorrect in Infoview Reports (URB# 244989).....28
- 11/6/24 – Incorrect Participants Displaying for Income Infoview Reports (URB# 245292) .29
- 11/6/24 – Local Use Question Information Not Displaying or Incorrectly Displaying in Infoview Reports .....29

RISK FACTORS.....29

- Occasionally Adding CPA Assigned Risk Factors that are High Risk Causes Non-High-Risk CPA Assigned Risk Factors to Display High Risk Asterisk (URB# 199262).....29
- Risk Factor 114 Resolves and Sometimes Removed when Health Information Page is Saved (URB# 232231). .....30
- Risk Factor 201 Incorrectly Assigned for a NBF Participant when Bloodwork and “Refused to Answer” or “Unknown” Cigarette Usage per Day is Entered (URB# 236773). .....30

VOC .....30

- Validation Message "No Pregnancy Record Found" Missing from VOC Certification Modal (URB# 197876). .....30

Version Control .....31

- Document Revision History Table .....31

## Overview

### Purpose of the Document

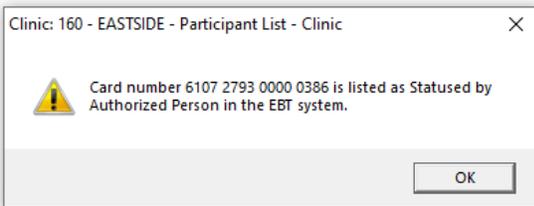
This document provides information specific to the transition from HuBERT to WINNIE.

### HuBERT TRANSITION

Agencies using HuBERT during the WINNIE Pilot & Rollout **MUST** review the information in this section for transition issues.

### Participant Search

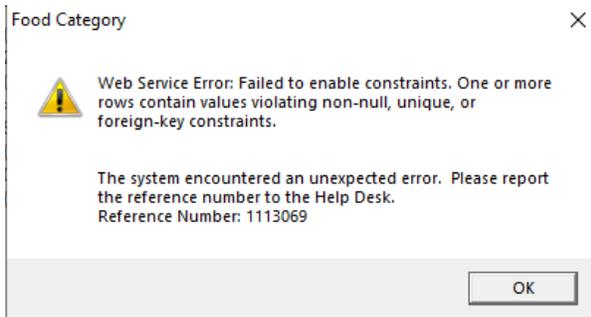
**Issue:** Unable to search for a household by card number using the PAN field for a participant issued the card in WINNIE. You will receive an incorrect message that the card has been “Stated” by Authorized person.



**What to do:** Use an alternate way to search for the household; Household ID, State WIC ID, or name.

### Direct Ship

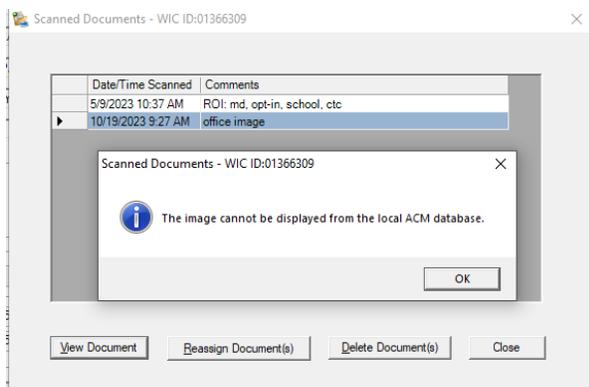
**Issue:** Benefits that are **partially** direct shipped and **partially** issued the eWIC card at the same time in WINNIE **cannot be adjusted or voided** in HuBERT, the following error is received.



**What to do:** Agencies should not issue more than 1 month of formula via Direct Ship. If you need to change a formula that was issued in WINNIE as part direct ship/part issued to the card, you must call the MN WIC Help Desk.

## Unable to view Documents uploaded/scanned in WINNIE.

**Issue:** When a document is scanned or uploaded in WINNIE you cannot view the document in HuBERT. WINNIE stores these documents differently, so they can be displayed in the browser. If you attempt to open one of these documents, you will receive the error below.



**What to do:** If you need to view a document that was scanned/uploaded in WINNIE while using HuBERT, you will need to call the MN WIC Help Desk.

## WINNIE TRANSITION

Agencies using WINNIE **MUST** review this information for transition issues.

### Incomplete Mid-Certification Assessments

**Issue:** WINNIE only allows users to remove, not resume, incomplete MCAs started in HuBERT.

**What to do:**

1. If you would like to complete an MCA for the participant, select to Remove the Incomplete MCA and start a new one in WINNIE.
  - a. Due to URB# 217398, remember to note the proofs before removing the incomplete MCA and reenter the proofs during MCA.
2. If you want to start a recertification, select the Remove Incomplete MCA for the participant and then select Start a Certification.

### Incomplete Certifications

**Issue:** In WINNIE, participant folders with an incomplete Certification that was started in HuBERT will display the option in the left navigation pane to Resume Incomplete Certification or Remove Incomplete Certification. However, if the user clicks either of these options the message, “The current certification attempt was started in SPIRIT Desktop and cannot be removed in WINNIE.” will display.



**What to do:** To resolve this issue, the user will need to call the MN Help Desk to have the current certification attempt removed.

## Difference in measurement calculations

**Issue:** WINNIE saves data to two decimal places, rather than only one decimal place as was previously done in HuBERT. The two decimal places make the values more accurate, however in some instances they are slightly different than the HuBERT calculations. These differences could, in some instances, trigger a Risk Factor recalculation to either add or remove a Risk Factor based on the new values. An example is below.

MEASURES		
AGE	HEIGHT	WEIGHT
2	34 4/8	30 # 0 oz
2 ½	36 1/8	33 # 3 oz

SYSTEM	LEGACY	WEB	LEGACY	WEB
HEIGHT	34.5"	34.5"	36.1"	36.13"
WEIGHT	30.0 #	30.0 #	33.2 #	33.19 #
BMI	17.70	17.72	17.90	17.88
BMI %	79.13%	79.45%	88.51%	88.25%

**What to Do:** Staff should be aware if a Risk Factor was added/removed or if they are now high risk because of the recalculation and provide the correct education if needed.

## 9/30/24 - Child Food Package Issued Before the Age of 1

**Issue:** If a child’s food package was issued to an infant in HuBERT, the food items cannot be adjusted in WINNIE until the infant’s one year birthdate.

**What to do:** Once the infant turns one, the child’s food package can be adjusted if redemption has occurred. A message will display when Adjust Benefits opens that will ask if you want to use the infant or child max limits. Select child on the message and the child max limits will display. The user can then adjust the child food items as needed.

If there have been no redemptions, best practice would be to void the incorrect set, update the food package, and reissue in Issue Benefits.

## Correspondence Preference in Household Demographics

**Issue:** In HuBERT, the Correspondence Field was not required. If left blank the default was English. In WINNIE, this field cannot be left blank; a value is required.

**What to Do:** If you are updating the Household Demographics this field will now be required, your options are English or Spanish. You should select English from the drop-down for participants whose correspondence preference is anything other than Spanish.

## Print Note option in Manage Notes

**Issue:** In WINNIE, if staff need to print a SOAP note that was created in HuBERT, the SOAP note displays with extra characters.

```
#XX#
#XX#O
#XX#03/24/2023 UnknownUnknown weight. Height for age percentile: N/A Weight for age percentile:
N/A
#XX#03/24/2023 HGB:0 HCT: 0 Lead:0 E.P.:0
#XX#
#XX#Risk Factors Assigned on 03/24/2023
#XX#-----
#XX#4:5H Inadequate Vitamin/Mineral Supplements- no further risk found
#XX#9:4 Environmental Tobacco Smoke Exposure
#XX#
#XX#A
#XX#
#XX#P
#XX#
```

**What to do:** This is a display issue only affecting SOAP notes originally created in HuBERT when printed. SOAP notes created in WINNIE display with no issues.

## 9/30/24 - Risk Factors Not Displaying the Correct Assignment Date

**Issue:** If risk factors have been assigned in HuBERT resulting in a pseudo-cert, all assigned risk factors including those originally assigned at certification are displaying the date of the pseudo-cert as the Assignment Date on the Risk Factors page in WINNIE.

**What to do:** This is a display issue during the HuBERT to WINNIE transition. All assignment dates are stored correctly in the database. Risk Factors assigned at certification are also listed on the Certification History page.

## NEED ASSISTANCE?

### MN WIC Help Desk

The MN WIC Help Desk is always your first call for assistance with HuBERT or WINNIE and are available Monday through Friday from 7:00 AM to 7:00 PM by phone or email:

**Phone: 1-800-488-8799** – press 2 for Minnesota, then

Press 2 - for regular help line

Press 1 - if urgent (unable to issue benefits or serve participants)

**Email:** [mnhelpdesk@gainwelltechnologies.com](mailto:mnhelpdesk@gainwelltechnologies.com)

## WINNIE Open Issues

This section contains open issues within WINNIE.

At the end of each title is a series of number that identifies the User Reported Bug (URB).

### BENEFITS

#### Able to Adjust Benefits when Homeless Verified Date is greater than 30 days in the Past (URB# 198880).

**Issue:** For a Participant whose Homeless Verified Date was more than 30 days in the past, the message stating, “Benefits cannot be adjusted because the household’s homeless verified date is not within 30 days of today’s date” does not display when attempting to adjust benefits. The user can successfully adjust benefits.

**What to do:** Update Homeless Verified date when reviewing Demographic Information with Participant prior to adjusting benefits.

#### Cannot Issue Benefits on Cert End Date (URB# 240270 & 240271).

**Issue:** Participants are automatically terminated on their Cert End Date during End of Day or may already be terminated for Failure to Pick-up. If you need to issue benefits on their Cert End Date, they must first be reinstated. However, in WINNIE, there is an issue, and **you are unable to reinstate them.**

**What to do:** Contact the MN Help Desk: **1-800-488-8799** – press 2 for Minnesota, then press 1. The Helpdesk will reinstate on the back end which will allow for the last month of benefit issuance.

#### Direct Shipped Benefits Assumed Returned by System during Change Household ID Process (URB# 239616).

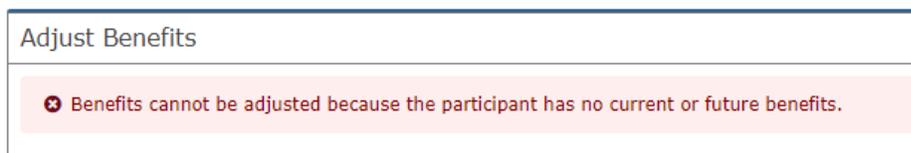
**Issue:** If a participant had any direct shipped benefits for the current month and their Household ID is changed, the system will automatically return all of the direct shipped formula cans and reissue them regardless of whether any benefits are direct shipped during Change Household ID mode.

**What to do:**

1. Since you cannot indicate if any of the cans of direct shipped formula were returned when changing the Household ID, if **all cans were not returned**, you should document in a note the actual number of cans that were returned (or if none were returned).
2. Use Adjust Benefits to return the extra cans of formula that were automatically direct shipped by the system when Change Household ID was completed.

## In Adjust Benefits, the Message that Displays after Voiding Current Benefits can be Misleading (URB# 199694).

**Issue:** After voiding all current and future benefits, WINNIE displays the following message:



**What to do:** No further action needed. This message displays to notify users that no benefits are available to adjust.

## 9/30/24 - Unable to Issue Benefits Because Income Entered in HuBERT is Blank in WINNIE (URB# 243303).

**Issue:** It appears that a few income records entered in HuBERT are not showing in WINNIE. When attempting to issue benefits, WINNIE is displaying the *“participant has a pending proof and has already received one benefit set”* message.

**What to do:** Use the income information in the SOD note to create a new income record in WINNIE and document that this was re-entered due to an issue.

This has only occurred twice and is being researched.

## Unable to Issue Benefits to a NBF Participant Turning 18 Years Old and Receiving Error Message: An Error Loading the Data Occurred (URB# 237962).

**Issue:** The error message "error loading the data" encountered by users when issuing benefits to NBF participants turning 18 is misleading. It fails to communicate the actual issue: the absence of a food prescription for the participant's food benefit set with an FDTU *after* they turn 18 years old.

In WINNIE, unlike the Pregnant and Breastfeeding categories, the Non-Breastfeeding WIC category requires a distinct food prescription for each of its two age groups to properly issue benefits; this system behavior differs from HuBERT.

The error message will eventually be updated to accurately reflect the situation: *“Benefits cannot be issued because a food prescription for age category Non-BF 18 years thru 65 years is not available to generate the benefit set for mm/dd/yyyy - mm/dd/yyyy.”*

**What to do:** Add a food prescription with an Effective Date of the participant’s 18<sup>th</sup> birthday.

## 10/9/24 – WINNIE Suggesting Two Sets of Benefits When Only One Set Toggled On (URB# 244195).

**Issue:** For some late benefit issuance, if only the late set of benefits is toggled on, WINNIE is still issuing the next month's set of benefits even though future months were toggled off. When this occurs, it appears to be working correctly until the user clicks the Issue Benefits button. The future set displays on the Aggregated Issuance modal and will be issued if the user clicks the Send eWIC Data button.

**What to do:** If the future set is suggested after being toggled off, click the Close button on the Aggregated Issuance modal. For each household member being issued only one set, change the Issuance Frequency (found in the Participant Menu) to Monthly.

## Wrong User Linked to Benefit Issuance (URB# 226398).

**Issue:** When CPA 1 attempts to issue benefits and the issuance fails due to an unforeseen glitch/loss of connection, the benefits go into a pending state and the CPA receives the following message: *"Benefits cannot be issued because an issuance is pending for this household that must be resolved."* When connection is restored and any other CPA (CPA 2) successfully issues benefits to any household, that successful issuance unlocks the benefits that were in a pending state and those pending benefits get issued. However, CPA 2 is listed as the CPA who issued the benefits, when it should be CPA 1.

**What to do:** Nothing, this will be resolved in the next WINNIE update.

## BLOODWORK

### Age at Measurement Displaying Invalid Gestational Age for Pregnant Women in Certification Mode (URB# 233625).

**Issue:** For pregnant women being certified, the Age at Measurement in the Bloodwork modal is displaying an invalid gestational age when it's completed, as appropriate, prior to Health Information. It should display their current age in years, months, and days until Health Information has been completed.

**What to do:** This is a display issue. If you return to the Bloodwork page once Health Information has been completed, the correct calculated Gestational Age will display.

## CALENDAR/RESOURCE SCHEDULE

### 11/5/24 – Cannot Save Recurring Holiday/Event (URB# 240362)

**Issue:** An error message displays when trying to save a recurring holiday or event if a non-recurring holiday or event already exists for the same day at the same clinic or another clinic within the agency.

**What to do:** Select a date a Start Date before the recurring event. For instance, if the Day and Weeks of Month are the 4th Friday for the recurring holiday/event and the Start Date is 11/22/24, enter 11/**21**/24 for the Start Date. Since this date falls outside of the Day and Weeks of Months selected, no holiday or event will be created on that date, the error message will not display, and the system will save the recurring holiday/event.

**Resolution:** Included in Release 3.5.0.

## 10/22/24 – Calendar Doesn’t Consistently Open with Default Scheduler Configuration of 30 Minutes and 2 Slots (URBs# 243208 & 224592)

**Issue:** The default Scheduler Configuration on the Clinic Schedule and Scheduler pages for all users is an Interval of 30 minutes and a Slot Count of 2. For some clinics, the calendar will not open with this setting, but will open when the Slot Count is manually changed to 6.

**What to do:** Call the Help Desk if you have this issue. They can change your default settings to a Slot Count of 6.

## 9/30/24 - Appointments Do Not Transfer to New Household after Household ID Change (URBs# 242800 & 199618).

**Issue:** When an individual appointment is scheduled prior to a HH change and then a HH change occurs, the appointment data does not update. The Appointment Details displays the old HH ID and phone number. Additionally, WINNIE does not recognize that an appointment exists for the participant in either the Appointment section in the participant’s record, or when attempting to generate the Appointment Notice.

**What to do:** Delete existing future appointment before starting HH Change. Schedule a new appointment after HH Change is complete, if needed.

## Appointments Scheduled in HuBERT Displays an Incorrect Staff Member (URB# 224691).

**Issue:** The Staff Member on the Appointments page in the Participant Folder is not displaying the correct staff person if the appointment was scheduled in HuBERT.

**What to do:** This is a display issue and will be fixed in the next release.

## Cannot Reschedule and/or Delete Appointments Scheduled for “Today” (URB# 224477).

**Issue:** In HuBERT, as long as it was still “today”, users could reschedule/delete appointments that were missed earlier in the day. WINNIE does not allow this function.

In addition, once the appointment time has passed, the appointment information will no longer display in the Show Details on the Participant Search page.

**What to do:** You will need to schedule **new** appointments for any appointments that were missed. If the new appointment is scheduled for later the same day and benefits are issued, WINNIE will mark both appointments as Kept. For accurate no-show rates, you may want to manually remove the checkmark for the appointment that wasn't kept.

### Household Appointment Blocks Do Not Indicate Appts Scheduled Within by Color (URB# 181417).

**Issue:** When a household appointment is scheduled, there is no indicator, by color for the types of appointments within the household block.

**What to do:** This is a display issue. Open the appointment to view the details.

### Legend on Clinic Schedule Incorrectly Displays Blue for an "Event" and Pink for a "Holiday" (URB# 209993).

**Issue:** The color Legend on the calendars display pink "Holiday" and blue "Event". However, it is showing pink for a full day Holiday or Event and blue for a partial day Holiday or Event.

Mon	Tue	Wed	Thu	Fri
Jan 1 12:00 AM - 11:59 PM New years holiday	2 12:00 AM - 11:59 PM New Event	3	4 12:00 PM - 4:00 PM Staff meeting	5
8	9	10	11	12

**What to do:** Display issue only, ignore Appointment type legend colors for Holidays/Events.

### 9/30/24 - Unable to Change Clinic Include Toggle for Appointment Types (BUG# 238695).

**Issue:** In WINNIE, users can specify whether an Appointment Type displays in the dropdown when scheduling for a certain clinic. All Appointment Types are included at all clinics by default. However, if the user toggles off Include for a clinic, it reverts back to its original position (toggled on) when the user clicks the Update button.

**What to do:** This issue is fixed in the upcoming release.

## CAPTURE SIGNATURE

### Message Explaining What the Participant is Signing Does Not Display when Capturing a Signature (URB# 239106).

**Issue:** When attempting to capture a signature for both the R&R's and issuing a card, the message explaining what the participant is signing for does not display on the signature pad.

**What to do:** This is a display issue and will be fixed in the next release.

## Signature Captured on Sig Pad Does Not Fully Display (URB# 241946).

**Issue:** In some occurrences, if the user maximizes/crosses over the far-right line when capturing a signature, the signature appears complete/correct on the signature pad but only half of the signature displays in WINNIE once the Okay button is selected on the signature pad.

**What to do:** Click the Capture Electronic Signature button again to obtain a new signature. If you are re-capturing a participant/proxy's signature, let them know that it works better if they stay within the lines of the signature box.

## When Capturing a Signature for a Current Certification, an Existing Signature Displays that was Captured Prior to the Current Date (URB# 232674).

**Issue:** Upon completion of a certification when attempting to capture a signature, an existing signature displays on the signature pad that was captured prior to the current certification. This issue does not occur often, and more research is needed. However, this existing signature issue has occurred during a pregnant and breastfeeding certification.

**What to do:** To ensure the current certification has the most up-to-date signature, click on the "Capture Signature" button to capture a fresh signature for the new certification. This step replaces the previous certification's signature, thereby maintaining the integrity and validity of the certification process.

## CERTIFICATION

### Certification End Date Incorrect for Children with a Birthday on 1<sup>st</sup> of Month When Certifying for the Last Time Before Turning 5 Years Old (URB# 236464).

**Issue:** When completing a certification or recert for a participant who will turn 5 years old within the cert period, and with a DOB that falls on the 1<sup>st</sup> of the month, the system sets the certification end date to the last day of the month prior to the 5<sup>th</sup> birthday instead of the last day of the month when the participant turns 5.

**What to do:** When issuing the last set of benefits prior to the child turning 5, manually terminate the participant and then complete a VOC Certification with the correct certification end date.

## DISPLAY

## Mother's WIC Category Change Modal Occasionally Not Displaying Upon First Save on Demographics Screen (URB# 197031).

**Issue:** The Mother's WIC Category Change modal should display when the user changes the WIC Category in the Demographics screen for a woman who is less than 6 months postpartum (Bf to NBF or vice-versa) the first time the Save button is selected.

**What to do:** Click the Save button again.

## Sidebar Menu: Collapse/Expand Function Does Not Work as Expected (URB# 180989).

**Issue:** The sidebar does not retain a user's choice to keep the menu options collapsed. Any screen changes result in the sections re-expanding.

**What to do:** Display only, select to collapse again.

## DOCUMENTS

### The Appointment Reminder and Official Notification Documents Display the Incorrect Address (URB# 242070)

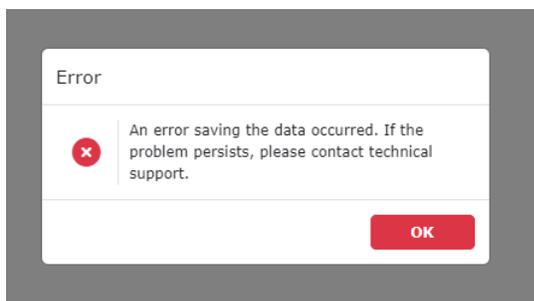
**Issue:** WINNIE incorrectly displays the household's Physical Address instead of their Mailing Address when printing the Appointment Reminder or Official Notification letters.

**What to Do:** For Appointment Reminder letters, you can print the letters in WINNIE then use the DAILY APPOINTMENTS Infoview report to print household labels.

## DOCUMENT IMAGING

### Copy Documents Does Not Consistently Copy the Document to Other Selected Household Members' Folders (URB# TBD).

**Issue:** WINNIE does not always copy the scanned and/or uploaded document when using the Copy Documents button to add a document to multiple household members' folders. The following error message is received.



**What to do:** Scan/Upload into each participant's folder separately.

## Documents Scan in Color Regardless of Color Toggle (URB# 199805).

**Issue:** Document scans and displays in color whether toggle is on or off.

**What to do:** No action to be taken.

## DUPLICATE PARTICIPANT

### Duplicate Participant Criteria is Case Sensitive (URB# 240307)

**Issue:** When the first/last name matching criteria is set to "Exact Match", WINNIE does not identify a capitalized HuBERT record and a lower-case WINNIE record with the same spelling as a match.

**What to do:** When prescreening a participant in WINNIE, use the Caps Lock Key to capitalize the entire name.

### State Defined Comparison Results Grid Not Displaying Compare Criteria Correctly in the Columns (URB# 241375)

**Issue:** When searching for Potential Duplicate Participants, WINNIE has First Name and Last Name as compare criteria, but only up to 3 characters. In the Results grid, the columns are displaying the full first and last names of one of the duplicate participant listed. However, it should display just the first 3 letters of each name (the actual Character Match Limit) like HuBERT does.

**What to do:** This is a display issue only; the functionality is not compromised.

## GROWTH GRID

### Must Toggle "Do Not Plot" for Unknown Entries to View Pregnant Growth Grid (URB# 234875).

**Issue:** If there is an Unknown height/weight entered during the current certification, the growth grid does not display even if there are other height/weight values entered after the unknown value.

**What to do:** Select "Do Not Plot" for the Unknown height/weight value to allow the grid to display.

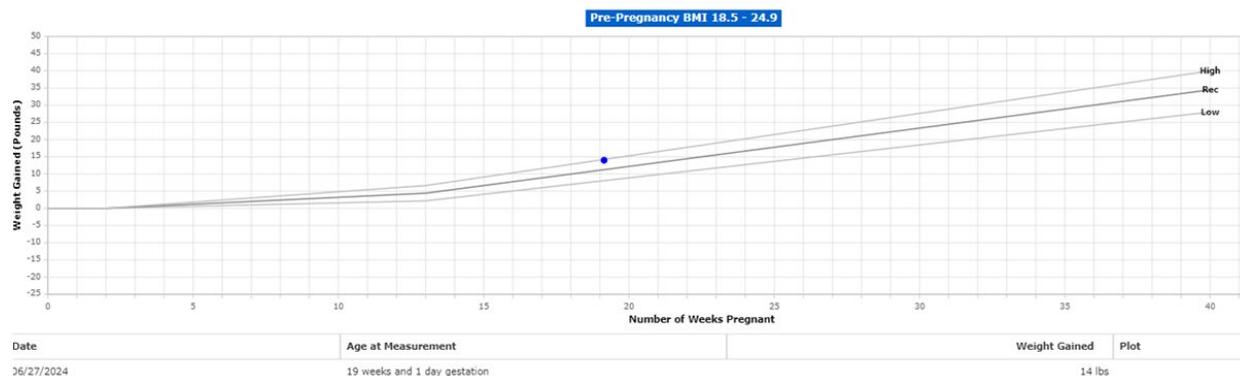
### Premature Grids Do Not Display for Premature Infants (URB# 227821).

**Issue:** The growth grids for premature infants do not display.

**What to do:** This is a defect with no current work-around.

### Pre-pregnancy Growth Chart Default Grid Lines Incorrect for Normal BMI 18.5-24.9 Range (URB# 238698).

**Issue:** There is a discrepancy in the pregnancy weight gain grid for participants with a pre-pregnancy BMI of 18.5 – 24.9, the recommended weight gain is between 25-35 pounds. However, the grid is showing the guidelines for an underweight pre-pregnancy BMI, which is less than 18.5, and the grid displays the weight gain range of 28-40 pounds.



**What to do:** CPAs may need to assign specific risk factors, such as 131 or 133, when a participant's weight gain or loss would typically deviate from the standard grid. Risk factor 131 pertains to low prenatal weight gain, while risk factor 133 relates to high maternal weight gain.

## HEALTH INFORMATION

### Inconsistently Receiving an Error Message When Attempting to Save Health Info Page for a Non-Breastfeeding (NBF) Woman (URB# 218645).

**Issue:** When certifying a Pregnant woman as NBF, we are inconsistently receiving the message: *An error occurred. If problem persists, please contact tech support.*

**What to do:** Select the Save button again and ensure the green “Changes saved.” message displays.

## INCOME

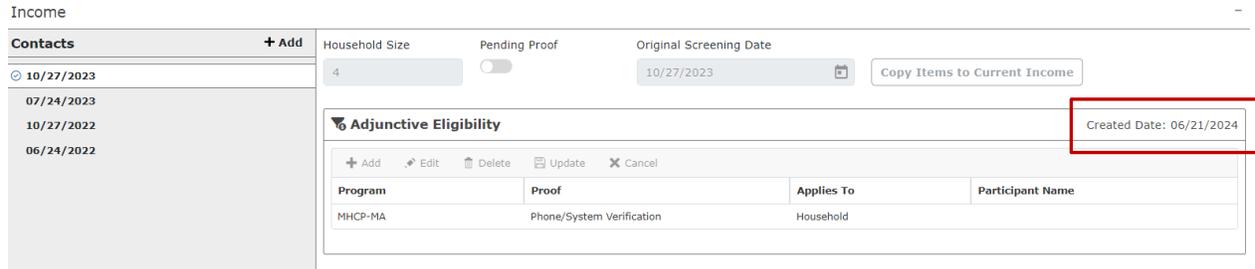
### Able to Delete Itemized Income After Completing Certification from Within the Participant Folder (URB# 197531).

**Issue:** System allows user to delete the itemized income contact the same day that the certification was complete.

**What to do:** Staff should **never** delete an income contact from within the folder on the same date as the certification. This income is part of the certification record and should not be altered.

### Created Date for Adjunctive Eligibility Displays the Current Date Instead of Original Income Contact Date (URB# 226276).

**Issue:** When viewing the available list of Income Contacts, regardless of which Income Contact date is selected, the Created Date is today's (current) date for Adjunctive Eligibility option.



**What to do:** This is a display issue only, ignore the created date.

### 9/30/24 - Hourly Income Created in HuBERT Displays Incorrectly in WINNIE (URB# 233380).

**Issue:** Hourly income contacts entered into HuBERT are displaying incorrectly in WINNIE. It appears to be calculating hourly income by dividing HuBERT's Amount per Hour by the Hours per Week and displaying that as the \$/Hourly in the Description column in WINNIE. The Amount column and the Weekly Income Total are both displaying the Amount per Hour.

EXAMPLE: Amount per Hour = \$20; Hours per Week = 25.20/25 = 0.80. WINNIE displays \$0.80/Hourly and \$20.00 as the Amount and Weekly Income Total.

Itemized Income Information				Created Date: 07/30/2024
+ Add Edit Delete				
Frequency ↑	Description	Proof of Income	Amount	
Hourly	\$0.80/Hourly	Pay Stub	\$20.00	
			Weekly Income Total: \$20.00	

**What to do:** This is a display issue only. The income entered previously in HuBERT is in the database. There is no current workaround, and it is currently being researched.

## No Option to Add a Duration for All Income Frequencies (URB# 220778).

**Issue:** In HuBERT, there is an option to enter the number of weeks, number of months, or number of periods to obtain an accurate attempt calculating household income for families that may not work year-round. In WINNIE, that option does not currently exist.

**What to do:** For families that do not work year-round, staff will have to calculate income separately and then add the appropriate amount in the proper Income Line Item.

## Resolving an Adjunct Eligibility Pending Proof on the Same Day as the Certification, when there are Multiple Members Certified, is Not Updating the Proof when Edited (URB# 197826).

**Issue:** If you certify multiple participants in a family on the same date with an income contact that is pending proof of one of the adjunctive eligibility options, and then the participant returns the same day with proof, the income is updated in one of the participant's folders. However, the Pending Proof will toggle off for all the members in the household, but the new proof of income does not update.

**What to do:** If proof of an adjunctive eligibility pending proof is provided the same day as the certifications, you will need to go into each household member's folder to update the proof field to the appropriate value.

## Unable to Generate Account Balance if LDTU is Today and No Future Benefits (URB# 208217).

**Issue:** If staff attempt to Generate Account Balance for a Household with benefits that expire today (LDTU is today) and do not have any future benefits, the following error message pops up:

Information



This document cannot be generated because the household does not have benefits with an LDTU in the future.

OK

**What to do:** Participants can still view the benefits via the MN WIC App, calling the Customer service line 1-833-566-5248 number on back of WIC card, view via the EBTedge portal, or ask the store to run an account balance.

## LOGIN

## Forgot/Change Password does Not Work once the Account is Locked (URB# 209032).

**Issue:** Once a user's account is locked due to Invalid login attempts being exceeded, trying to use the Forgot/Change Password link does not currently work.

**What to do:** If the user account becomes locked, call the MN WIC Help Desk to have it unlocked/reset your password.

## When the Reset Password Link in the Reset Password Email has Expired an "Invalid token" Message Incorrectly Displays (URB# 203556).

**Issue:** If the link on a Reset Password email, that is more than 24 hours old is clicked, once the user enters the New Password and the Confirm Password then clicks Save, a red "Invalid token" message is displaying.

**What to do:** If your Reset Password email is more than 24 hours old, select the "Forgot/Change Password?" link again and reset it immediately.

## MANAGE ALERTS/NOTES

### ALERTS: The Pregnant and Breastfeeding System Alert Should Display for all Household Members Regardless of whose Folder is Opened (URB# 219163).

**Issue:** The Pregnant and Breastfeeding system alert only displays when the Pregnant participant's record is opened. It does not display when the Infant's record is opened. Any System Alert should display for all household members when any household member's record is opened.

**What to do:** When opening a household with multiple members that contains a Pregnant participant, open the folder of the Pregnant participant first.

### Updated 9/30/24 - Copy to Note Function Does Not Properly Copy the Alert in other Household Members Notes (URB# 239373).

**Issue:** It appears there is a functionality issue with the 'Copy to Note' feature. When attempting to copy an alert to multiple household members' notes, the alert only saves in the note of the currently opened participant, despite other members being selected. Toggling-on 'Copy' under Household Members will save in all Household members' Notes. However, the 'Copy' option does not exclude members that may be deselected.

**What to do:** If an Alert can be copied in a Note for all household members, toggle-on Copy under Household Members.

However, if the Alert should not be saved in a Note for all household members:

1. The Alert can be copied in each participants' folder Note separately.
2. Copy to all other household members. Users can **choose whether to delete** the note from any members to whom it doesn't apply (NOTE: notes can only be deleted on the same date they are created).

## MATERIALS GIVEN

### Save Button for Materials Given does not Display (URB# 197480).

**Issue:** In some occurrences, when attempting to add a Materials Given Contact, users have encountered two issues:

1. The WIC Category is grayed out.
2. Save Button does not display, and users cannot save the contact.

This issue occurs inconsistently in both the Chrome and Edge browser.

**What to do:** Refresh the page or close out of WINNIE and then attempt to add it again. If that did not resolve the issue, document the Materials Given in a note.

## MID-CERTIFICATION ASSESSMENT

### Mid-certification Due & Complete Dates Do Not Display in Show Details (URB# 240596).

**Issue:** In some occurrences, the MCA information does not display in the Show Details section on the Participant Search page even though the Mid-cert has been completed.

<b>Certification Effective</b>	<b>Certification End</b>
01/25/2024	01/31/2025
<b>Mid-certification Due</b>	<b>Mid-certification Complete</b>
N/A	N/A

**What to do:** This is a display issue. The Mid-Certification Assessment Information is viewable in the Certification History in the Participant Folder.

### Remove Incomplete MCA is Deleting the Proofs Collected at Certification (URB# 217398).

**Issue:** When an attempted MCA is removed, the system deletes the saved Proofs of ID and Address that were obtained during the previous Certification.

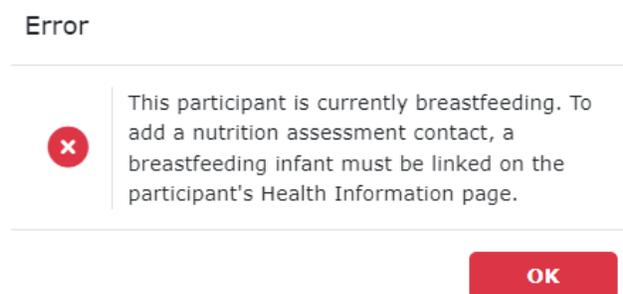
**What to do:** If an MCA cannot be completed, prior to selecting the Remove Incomplete MCA. View the Proofs in the Participant Action Menu dropdown and note the values that are saved.

After removing the Incomplete MCA, if the Proofs have been removed, re-enter the Proofs back into the Proofs Modal.

## NUTRITION ASSESSMENT

### Error Message if Adding Nutrition Assessment Before Completing Health Information for a BF Woman Does Not Accurately Reflect What the User Must Do (URB# 237021).

**Issue:** If a user attempts to add a Nutrition Assessment for a Breastfeeding woman *before* completing the Health Information, the following message displays:



**What to do:** The above message is misleading. The Health Information screen, the Infants Born from This Pregnancy modal **MUST** be completed prior to adding a Nutrition Assessment. This is needed to determine which set of Nutrition assessment questions are displayed.

### No Records to Display Error Message for Child on Nutrition Assessment Page (URB# 224665).

**Issue:** Due to an unresolved bug in HuBERT, some children have a Breastfeeding Amount other than Non-Breastfeeding. When this occurs, WINNIE is unable to populate the Nutrition Assessment questions because there aren't any questions created for children with a Breastfeeding Amount other than Non-Breastfeeding.

Users receive the following error message when attempting to update the Nutrition Assessment page:



**What to do:** The following steps will update the mis-matched data and allow the user to Add a new Nutrition Assessment Contact:

1. Click Cancel on the message.

2. Go to Health Information.
3. Toggle-On Breastfeeding Beyond One Year.
4. Save.
5. Confirm Yes to Food Prescription message (if applicable).
6. Toggle-Off Breastfeeding Beyond One Year. Update Breastfeeding End Date. Update Reason(s) Stopped.
7. Save.
8. Go back to Nutrition Assessment Contact to Add a new contact.

## Questions that are Skipped or Not Answered when Completing a Nutrition Assessment Contact Display with “Not Answered” in the Comments (URB# 217769).

**Issue:** When completing a Nutrition Assessment contact, if a question is skipped and then a question is answered after it, the questions in between the two answered questions will display with “Not Answered” in the comments.

**What to do:** This is a display issue for unanswered questions.

## NUTRITION EDUCATION

### 10/30/24 – Previously Deactivated Goal Results Displaying in Dropdown (URB# 245293)

**Issue:** Goal results that were made inactive in 2011 now display in the Goal Results dropdown because users were unable to open the Nutrition Education page (the blue spin icon spun and spun, and the page never opened) for participants who had one of these goal results previously selected. In order to resolve this issue, these goal results had to be made active again.

**What to do:** Do **not** select these goal results. They are easily identifiable because they display at the bottom of the dropdown list and have (*Deact. 2011*) at the end of the goal result. They have only been added to ensure Nutrition Education contacts can be created for all participants.



## PARTICIPANT FOLDER

### Unable to Open Participant Folder if Currently Income Ineligible (URB# 226457 & 239747).

**Issue:** You are unable to open the Participant Folder if a participant was determined income ineligible at their last certification.

**What to do:** Contact the MN Help Desk: **1-800-488-8799** – press 2 for Minnesota, then press 1. The Helpdesk will reinstate on the backend.

## PARTICIPANT SEARCH/TRANSFER

### DOB Displays Incorrectly When Transferring Participant (URB# 242414).

**Issue:** The Date of Birth on the Transfer Participant(s) modal sometimes displays a date one day before the participant's actual DOB.

**What to do:** This is a display issue and is currently being researched.

### Gender is Incorrect on the Participant Search Page when Searching by Appointments (URB# 224670).

**Issue:** After searching by Appointments, the gender on the participant card does not always match the gender listed in the participant's folder.

**What to do:** This is a display issue and will be fixed in the next release.

### If the Participant has an Appointment in a Clinic other than Current Selection, Results Display the Appointment Clinic, Not the Participant's Assigned Clinic (URB# 224499 & 238556).

**Issue:** When a participant's folder is opened from the Appointment Search page, the participant appears to be in that clinic. Edits and information can be entered. However, upon completion of the certification, when the CPA attempts to issue benefits, they cannot because the participant was never transferred into the same clinic as the CPA.

**What to do:** Go back to the Participant Search page, search for the participant using Statewide, and transfer participant into the correct clinic. Verify all edits/information saved correctly. Issue benefits.

## PEER PROGRAM

### Staff Names are Not Consistently Displaying in the Peer Counselor Contacts (URB# 240597).

**Issue:** Before Peers were assigned a HuBERT username, HuBERT allowed the user to type in a staff member's name which resulted in no User ID (username) linked to that Peer. Therefore, in WINNIE, there is no User ID to populate, and the Staff Member field is blank.

**What to do:** This is a display issue only. Staff names are in the database. There is no current work-around. It will be fixed in the next release. However, for staff concerned that some peer clients are not appearing on the PEER ACTIVE CLIENT LIST can try a new version of the report, PEER ACTIVE CLIENT LIST by STAFFID. The original version pulls clients by the peer counselors' ID numbers, while the new version pulls clients by the staff ID of the staff person who entered the peer data.

## REPORTS

### 11/6/24 – Staff IDs Not Displaying Username for New WINNIE Staff in Infoview Reports

**Issue:** WINNIE automatically generates user IDs that begin with SWEB and end with 11 random digits for new users. This is used as the Staff ID instead of the username, which was used in the Legacy system and is still used for staff who used the Legacy system.

**What to do:** Infoview reports can be revised to use display the staff person's name instead of the Staff ID. Submit a [Local Agency Reports & Data Request](#) if you are **currently using** a report that is displaying SWEB IDs in the Staff ID column(s). Enter the **exact name** of the Infoview report that needs to be revised in the *What Information are you trying to collect* field and "NA" into the *How will this information be used* field.

### 11/6/24 - New Cert/Recert Counts Incorrect in Infoview Reports (URB# 244989)

**Issue:** WINNIE is incorrectly updating the MEMBER.Createdttm when measurements are added. This date/time is used to determine if a certification was for a new participant or an existing participant.

**What to do:** Infoview reports can be updated to use different criteria to determine the type of certification. Submit a [Local Agency Reports & Data Request](#) if you **are currently using** a report that is providing incorrect information. Enter the **exact name** of the Infoview report that needs to be corrected in the *What Information are you trying to collect* field and "NA" into the *How will this information be used* field.

## 11/6/24 – Incorrect Participants Displaying for Income Infoview Reports (URB# 245292)

**Issue:** In order to ensure backwards compatibility with HuBERT, and in order to see all household income records when a new member is added, WINNIE adds/creates income records that match all other existing household income records. The Create Date/Time for these records are when the income records were added for the new member, not when the income record itself was created. Infoview reports use the Create Date/Time to determine the date an income contact occurred, which is no longer correct for these participants.

**What to do:** Infoview reports can be revised to use different criteria to determine when the income record was created. Submit a [Local Agency Reports & Data Request](#) if you are **currently using** a report that is providing incorrect information. Enter the **exact name** of the Infoview report that needs to be corrected in the *What Information are you trying to collect* field and “NA” into the *How will this information be used* field.

## 11/6/24 – Local Use Question Information Not Displaying or Incorrectly Displaying in Infoview Reports

**Issue:** In HuBERT, Local Use Questions were assigned a position (1-6). In WINNIE, the order a question displays in Demographics is now based on the Sort Order field and every question is assigned its own distinct sort order number. When an answer was selected in HUBERT, a record was created and stored in the table based on the question’s position (1-6). This was the most recently selected answer for that participant. In WINNIE, answers are stored based on the unique Question ID associated with the Local Use Question and their Answer Date is stored in a different table. Infoview reports that used the Local Use Question position will no longer work for any answers collected in WINNIE.

**What to do:** Infoview reports can be revised to use the Question ID and the date the answer was selected to identify responses to Local Use Questions. Submit a [Local Agency Reports & Data Request](#) if you are currently using a report that is providing incorrect information. Enter the **exact name** of the Infoview report that needs to be revised or corrected in the *What Information are you trying to collect* field and “NA” into the *How will this information be used* field.

## RISK FACTORS

### Occasionally Adding CPA Assigned Risk Factors that are High Risk Causes Non-High-Risk CPA Assigned Risk Factors to Display High Risk Asterisk (URB# 199262).

**Issue:** Occasionally, when a user adds a CPA-assigned Risk Factor that is high risk along with RFs that are CPA-assigned and NOT high risk, the ones that are not high risk display the high-risk asterisk.

**What to do:** This does not happen consistently and is a display issue only.

### Risk Factor 114 Resolves and Sometimes Removed when Health Information Page is Saved (URB# 232231).

**Issue:** For participants currently assigned RF 114, once the Health Information page is saved, RF 114 may incorrectly be resolved or removed from the Risk Factor modal.

**What to do:** Should RF 114 be resolved or removed; it should be reassigned.

### Risk Factor 201 Incorrectly Assigned for a NBF Participant when Bloodwork and “Refused to Answer” or “Unknown” Cigarette Usage per Day is Entered (URB# 236773).

**Issue:** Risk Factor 201 automatically assigns even if a bloodwork value that is within the normal limits is entered, if the “Refused to Answer” or “Unknown” option for cigarette usage per day in the Health Information modal is selected for a NBF participant.

**What to do:** If possible, enter a value in the Cigarette Usage Per Day in Health Information or add an explanation in a SOAP of the incorrect assignment of Risk Factor 201.

## VOC

### Validation Message "No Pregnancy Record Found" Missing from VOC Certification Modal (URB# 197876).

**Issue:** The "No Pregnancy Record Found" validation message is missing from the VOC Certification screen. This occurs when “Yes” is selected for the “Was this participant active in your WIC program during her most recent pregnancy?” for a new Household or a participant with a very old record that was not on WIC during her previous pregnancy.

**What to do:** Only select “Yes” to the question if the participant was in fact on WIC during the previous pregnancy in the State of Minnesota.

## Version Control

### Document Revision History Table

Version	Date	Description	Summary of Changes
1.0	10/25/2023	Draft for pilot	
1.1	12/28/2023	Update	November Release Version 3.1.0
1.2	06/26/2024	Update	May Release Version 3.3.0 – removed resolved bugs and added new bugs found by Maine & Montana pilots.
1.3	07/29/2024	Update	Added new bugs identified during Dakota’s pilot.
1.4	08/19/2024	Update	Added new bugs identified during St. Paul – Ramsey’s pilot.
1.5	08/29/2024	Update	Added new bugs.
1.6	09/3/2024	Update	Additional bugs added.
1.7	09/9/2024	Update	Added additional bugs identified during Hennepin’s pilot.
1.8	9/30/2024	Update	Additional bugs identified since Hennepin’s pilot.
1.9	10/9/24	Update	Added URB 244195
1.10	10/22/24	Update	Added URBs 243208/224592 (same issue)
1.11	10/24/24	Update	Added URB 242070
1.12	10/30/24	Update	Added URB 245293
1.13	11/6/24	Update	Added URB 240362 and Reports section detailing issues with Infoview reports

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.*