

# Assessment of Reports Needed for WINNIE

UPDATED NOVEMBER 2024

| Report Name   | Current Report Source                        | Infoview or Other Version  | Deadline                 | Completed/Last Revision Date |
|---|--|--|--------------------------|------------------------------|
| Year-to-Date Participation and Outlays (FIN017)                                   | HuBERT State Office Module and State EOM     | <a href="#">YEAR-TO-DATE PARTICIPATION</a><br>Found in: INFOVIEW TEMPLATES >> Count >> Monthly Participation<br>Participation portion of report – recreated in Infoview.   | WINNIE Pilot or Roll-out | Revised 3/13/2023            |
| Year-to-Date Participation and Outlays (FIN017)                                   | HuBERT State Office Module and State EOM     | Outlays portion of report (can only be recreated for total participation by state, grantee, agency and clinic; not by WIC Type and BF Amount).   | WINNIE Pilot or Roll-out | Data Direct by request       |
| WIC Reported Participation - 798 (CLD022)   | HuBERT State Office Module                   | Will be available in WINNIE – Finance Module   | NA                       | Cycle 8                      |
| PC2020  | HuBERT State Office Module                   | Will be available in WINNIE – Clinic Services Module   | NA                       | Cycle 7                      |
| Weight Status   | Agency EOM/State EOM                         | <a href="#">Weight Status Annual Reports</a>   | NA                       | Annual Reports               |
| Benefit Pickup Report (CLN006)  | HuBERT Clinic Module                         | MISSED NUTRITION VISITS<br>Found in: INFOVIEW TEMPLATES >> Benefits  | NA                       | 6/27/2016                    |
| Initial Contacts Report (CLN040)  | Hubert Clinic and State Office Modules       | INITIAL CONTACTS<br>Found in: INFOVIEW TEMPLATES >> Initial Contacts   | NA                       | 9/12/2016                    |
| Initial and Close-out Participation by Clinic, Agency and Grantee Report (FDI103) | HuBERT State Office and State EOM/Agency EOM | <a href="#">YEAR-TO-DATE PARTICIPATION</a> BY AGENCY AND CLINIC – STATEWIDE<br>Found in: INFOVIEW TEMPLATES >> Counts >> Monthly Participation<br>Posted to the <a href="#">Monthly Participation</a> page after EOM each month. | NA                       | Completed 3/1/2023           |
| Upcoming Appointments (CLN020)  | HuBERT Clinic Module                         | DAILY APPOINTMENTS<br>Found in: INFOVIEW TEMPLATES >> Appointments   | NA                       | 4/15/2021                    |
| Participation vs. Enrollment Monthly (CLD029)                                     | HuBERT Clinic and State Office Modules       | PARTICIPATION vs. ENROLLMENT MONTHLY (INFOVIEW TEMPLATES >> Counts >> Monthly Participation)   | WINNIE Pilot or Roll-out | Completed 4/7/2021           |

ASSESSMENT OF REPORTS NEEDED FOR WINNIE

| Report Name  | Current Report Source                                   | Infoview or Other Version  | Deadline                 | Completed/Last Revision Date |
|--|---|--|--------------------------|------------------------------|
| <a href="#">Summary Statistics Report – Breastfeeding</a> (CLN032) | Agency EOM and State EOM                                | SummaryStatisticsBreastfeedingReport<br><a href="#">Guidance for Summary Statistics Report - Breastfeedingv</a><br>In Infoview: AGENCY EOM >> Year >> YYYYMM >> Minnesota Reports  | Release 2.40             | Completed April 2021         |
| Dual Enrollment (ENR001)   | HuBERT State Office Module                              | Oversight for dual enrollment is the responsibility of the State Office Food Delivery Unit. This does not need to be re-created for agencies.  | NA                       | NA                           |
| Agency Check Audit Detail and Summary Spreadsheets (FDI010)        | HuBERT State Office Module                              | Based on paper benefits – will not be re-created.  | NA                       | NA                           |
| Breastfeeding Duration – No Longer Breastfeeding (OPR033)          | HuBERT State Office Module                              | <a href="#">Breastfeeding Summary</a><br>BF STOPPED REASONS<br>Found in: INFOVIEW TEMPLATES >> Breastfeeding   | Annual                   | Annual Reports               |
| Summary Statistics Report (CLN031)                                 | Agency EOM  | Separated into 3 different reports:<br><ul style="list-style-type: none"> <li>▪ SummaryStatistics_DPE (<a href="#">Guidance for Summary Statistics Report – Documented Program Eligibility (DPF) Profile</a>)</li> <li>▪ SummaryStatistics_ICRF (<a href="#">Guidance for Summary Statistics Report – Currently Certified Infants and Children Risk Code Profile</a>)</li> <li>▪ SummaryStatistics_WomenRF(<a href="#">Guidance for Summary Statistics Report – Currently Certified Women Risk Code Profile</a>)</li> </ul> In Infoview: AGENCY EOM >> Year >> YYYYMM >> Minnesota Reports | Release 2.40             | Completed April 2021         |
| Participants for Chart Audit (OPR051)                              | HuBERT State Office Module                              | PARTICIPANTS FOR CHART AUDIT<br>Found in: INFOVIEW TEMPLATES >> Agency Management >> Audits/Chart Reviews  | WINNIE Pilot or Roll-out | Completed 4/12/2021          |
| View Appointments for Date Print Capability                        | HuBERT Clinic Module: View Appointments for Date Screen | DAILY APPOINTMENTS<br>Found in: INFOVIEW TEMPLATES >> Appointments<br>Output “Generate Clinic Schedule” on the Clinic Schedule page in WINNIE.   | NA                       | Completed 4/15/2020          |
| Missed Appointments Letters/Labels/Postcards                       | HuBERT Clinic Module                                    | MISSED APPOINTMENTS<br>Found in: INFOVIEW TEMPLATES >> Appointments  | WINNIE Pilot             | Completed 4/12/2021          |
| Participant High Risk Report (CLN030)                              | HuBERT Clinic Module                                    | PARTICIPANT HIGH RISK REPORT<br>Found in: INFOVIEW TEMPLATES >> High Risk  | WINNIE Pilot or Roll-out | Completed 4/27/2021          |

ASSESSMENT OF REPORTS NEEDED FOR WINNIE

| Report Name                                  | Current Report Source             | Infoview or Other Version   | Deadline                 | Completed/Last Revision Date       |
|--|-----------------------------------|---|--------------------------|------------------------------------|
| No Shows (CLN021)                            | HuBERT Clinic Module              | NO SHOWS BY DATE AND TIME<br>Found in: INFOVIEW TEMPLATES >> Appointments   | NA                       | Completed<br>8/8/2018              |
| Missed Appointments Follow-up                | HuBERT Clinic Module – Activities | <ul style="list-style-type: none"> <li>▪ MISSED APPOINTMENTS FOLLOW-UP BY APPOINTMENT TYPE</li> <li>▪ MISSED APPOINTMENTS FOLLOW-UP BY CURRENT WIC TYPE</li> </ul> Found in: INFOVIEW TEMPLATES >> Appointments<br><br>NOTE: Function is available in WINNIE (User Story 126841) but Print function generated the Missed Appt Follow-up report, which is not include in WINNIE scope. | NA<br>NA                 | Completed<br>3/8/2017<br>12/1/2016 |
| Potential Duplicate Participants             | HuBERT Central Admin Site Module  | WINNIE – Clinic Module  | NA                       | Completed<br>November 2024         |
| Kept vs. Missed Appointments Report (CLN019) | HuBERT Clinic Module              | KEPT VS. MISSED APPOINTMENTS<br>Found in: INFOVIEW TEMPLATES >> Appointments  | WINNIE Pilot or Roll-out | Completed<br>4/7/2021              |
| Formula Issued – Local Agency Breakdown      | Agency EOM                        | FORMULA ISSUED – LOCAL AGENCY BREAKDOWN & STATE SUMMARY<br>Found in: INFOVIEW TEMPLATES >> Food & Formula<br><br>NOTE: Combined LA Breakdown and State Summary into one template.   | Release 2.40             | Completed<br>11/24/2020            |
| Formula Issued – State Summary               | Agency EOM                        | FORMULA ISSUED – LOCAL AGENCY BREAKDOWN & STATE SUMMARY<br>Found in: INFOVIEW TEMPLATES >> Food & Formula<br><br>NOTE: Combined LA Breakdown and State Summary into one template.   | Release 2.40             | Completed<br>11/24/2020            |

## Reference – Complete Listing of Hyperlinks

[Year-to-Date Participation Infoview Guidance Document \(https://www.health.state.mn.us/docs/people/wic/localagency/infoview/ytdpptn.pdf\)](https://www.health.state.mn.us/docs/people/wic/localagency/infoview/ytdpptn.pdf)

[Weight Status Annual Reports \(https://www.health.state.mn.us/people/wic/localagency/reports/wtstatus/index.html\)](https://www.health.state.mn.us/people/wic/localagency/reports/wtstatus/index.html)

[Monthly Participation \(https://www.health.state.mn.us/people/wic/localagency/participation.html\)](https://www.health.state.mn.us/people/wic/localagency/participation.html)

[Guidance for Summary Statistics Report – Breastfeeding \(https://www.health.state.mn.us/docs/people/wic/localagency/reports/eom/summstatsbf.pdf\)](https://www.health.state.mn.us/docs/people/wic/localagency/reports/eom/summstatsbf.pdf)

ASSESSMENT OF REPORTS NEEDED FOR WINNIE

[Breastfeeding Summary \(https://www.health.state.mn.us/people/wic/localagency/reports/bf/annual.html\)](https://www.health.state.mn.us/people/wic/localagency/reports/bf/annual.html)

[Guidance for Summary Statistics Report – Documented Program Eligibility \(DPE\) Profile \(https://www.health.state.mn.us/docs/people/wic/localagency/reports/eom/summstatsdpe.pdf\)](https://www.health.state.mn.us/docs/people/wic/localagency/reports/eom/summstatsdpe.pdf)

[Guidance for Summary Statistics Report – Currently Certified Infants and Children Risk Code Profile \(https://www.health.state.mn.us/docs/people/wic/localagency/reports/eom/summstatschild.pdf\)](https://www.health.state.mn.us/docs/people/wic/localagency/reports/eom/summstatschild.pdf)

[Guidance for Summary Statistics Report – Currently Certified Women Risk Code Profile \(https://www.health.state.mn.us/docs/people/wic/localagency/reports/eom/summstatswomen.pdf\)](https://www.health.state.mn.us/docs/people/wic/localagency/reports/eom/summstatswomen.pdf)

*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.*