

Certification 1C - WINNIE Online Training Module

SEPTEMBER 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It provides a continued overview of certification in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being September 5, 2023.

<Transition Slide>

<screen description – no audio> Slide transitions from topic slide to Sallie Mander's Demographics page in Certification Mode.

Continue 1

Let's continue our review of Certification mode for Sallie Mander, starting with obtaining checkmarks for some of these requirements.

Race Ethnicity 1

We already reviewed, in detail, the functionality behind Race/Ethnicity and Proofs in the Participant Menu 2 training module.

As far as obtaining a checkmark for Race/Ethnicity during Certification Mode, the Race/Ethnicity modal must **only be opened** if it's **never been completed**.

To open Race/Ethnicity, we can simply click the link in the Certification/MCA section; we do not have to use the Participant menu.

Go ahead and click on Race/Ethnicity.

<no audio> Select Race/Ethnicity from the sidebar.

Race Ethnicity 2

The Race/Ethnicity modal opens.

<screen description – no audio> Slide transitions back to demographics page in Cert Mode.

Race Ethnicity 3

Although it's required to complete a cert, if Race/Ethnicity has already been collected, WINNIE will recognize this, so we **do not need** a checkmark to display for it.

We can document Race Ethnicity at any time; we do not have to wait to open Certification Mode.

Proofs 1

Unlike Race/Ethnicity, Proofs do require a checkmark but like Race/Ethnicity, we can click the link on the sidebar to open the Proofs modal.

Go ahead and do that.

<no audio> Select Proofs from the sidebar.

Proofs 2

As mentioned before Residence is household-level and auto-populates for any other household member being certified within 92 days of being verified.

For new participants, we can document the Proofs at any time because there is no previously existing record.

However, for existing participants anything documented in the Participant Folder will be cleared when Certification Mode is opened because the current record is over-written when we start a cert, so we must document Proofs for existing participants only after opening Certification Mode.

<Transition Slide>

<screen description – no audio> Slide transitions from Proofs modal back to Demographics page.

Income 1

If multiple household members are being certified on the same date, the income only has to be entered for one household member.

But in order for the income record to be recognized for any other members being certified, we must open the income page to get the checkmark.

Risk Factors 1

Risk Factor assessment and assignment occurs automatically during the cert once the participant's WIC Category and BF Amount are known but to receive the checkmark, we must open the Risk Factors page.

(This should occur anyway since all participants being certified, over four months of age, being certified should be assigned a dietary risk factor.)

Food Prescription 1

A Food Prescription is required to complete the cert and we must open the Food Prescription page to receive the checkmark.

Once clicked, WINNIE will auto-generate the food prescription (and any future food prescriptions for age category changes that may occur during the certification period) based on WIC Category, BF Amount, and age.

eWIC Account 2

As an honorable mention, Manage eWIC Account is not required as part of the cert.

The assumption is that assignment of a card may have already occurred or is part of our clinic flow, for instance, we always assign the card at the beginning of our appointment, during the cert, or before issuing benefits to new participants.

Since the system does not require that a card be assigned to issue benefits, best practice is to ensure a card is assigned before issuing.

Remove Incomplete 1

We are able to remove most records associated with a certification before it's completed.

We are going to complete some of the required information: Demographics, Race/Ethnicity, Proofs, Income, Health Information and Height/Weight.

Now, go ahead and close Cert Mode.

<no audio> Click the Close button in the Certification Mode banner.

Remove Incomplete 2

Collapse the Clinic Actions and click Remove Incomplete Certification.

Remove Incomplete 3

<no audio> Collapse the Clinic Actions section and click Remove Incomplete Certification.

Remove Incomplete 4

The message that displays informs us that the current cert attempt will be removed, and any information collected will not be saved.

This message is close to the truth but not exactly true, as we'll see in a minute.

Go ahead and click Yes.

<Waiting>

<screen description – no audio> Spin icon displays.

Remove Ht/Wt/Blood

Let's take a look at our completed pages in reverse, beginning with height/weight, which we can see has been deleted.

If we had completed bloodwork, that would have deleted also.

Remove Health Info

Health Information records are removed for women.

For infants and children, any changes are retained.

Remove Income

Income is removed as long as it has not been shared with any other household members being certified on the same date.

Remove Proofs

Both Residence and Identification proofs are removed.

Remove Race Ethnicity

Race, Ethnicity, and Tribe (if selected) are retained.

Remove Demographics

For Demographics and Household Demographics, the only changes that are reverted are the Physically Present status and the Local and State Use Questions.

Remove Others

Other information that will be removed or reverted include Food Prescription, Nutrition Assessment, Nutrition Education, which includes all types of contacts, Referrals, Risk Factors, and SOAP Notes.

Unlock PF 1

Removing the cert attempt also unlocks the participant folder.

Start New Cert 1

Once we've removed the incomplete cert, we can just immediately start a new one if we need to.

For example, maybe we started a cert as the incorrect WIC Category and Sallie is actually non-breastfeeding.

We can remove the cert before we complete it and just start a new one.

Go ahead and do that for Sallie, our newly prescreened **non**-breastfeeding woman.

Collapse the Clinic Actions and start a new cert. Click anywhere for a hint.

<audio – hint> Collapse the Clinic Actions section on the sidebar.

WIC STAFF: Shoot! She is actually non-breastfeeding, I misunderstood...she isn't breastfeeding anymore...

WIC STAFF: Luckily, WINNIE will let me remove an incomplete cert and just start a new one!

Start New Cert 2

<no audio> Start another cert for Sallie, our newly prescreened non-breastfeeding woman. Collapse the Clinic Actions. Click anywhere for a hint.

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

<Waiting>

<screen description – no audio> Spin icon displays.

Start New Cert 3

<no audio> Start another cert for Sallie, our newly prescreened non-breastfeeding woman. Collapse the Clinic Actions. Click anywhere for a hint.

<audio – hint> Click the WIC Category dropdown.

Start New Cert 4

<no audio> Start another cert for Sallie, our newly prescreened non-breastfeeding woman. Collapse the Clinic Actions. Click anywhere for a hint.

<audio – hint> Select Non-Breastfeeding.

Start New Cert 5

<no audio> Start another cert for Sallie, our newly prescreened non-breastfeeding woman. Collapse the Clinic Actions. Click anywhere for a hint.

<audio – hint> Click the No button.

<Waiting>

<screen description – no audio> Spin icon displays.

Start New Cert 6

And her WIC Category is now non-breastfeeding.

<screen description – no audio> Slide transitions to message that another cert cannot be started on the same date as the most recently completed cert.

Start New Cert 7

We should note that once a certification has been completed, we cannot start a new cert on that same date.

So, if we had finished our cert for the wrong WIC Category, we would have had to wait at least one day before starting a cert for the correct category.

<Transition Slide>

<screen description – no audio> Slide transitions from unable to start cert message back to Sallie's Demographics in Cert Mode.

Demo Requirements 1

Let's talk about some of the cert requirements found on the Demographics page, starting with Physically Present.

Physically Present 1

Physically Present is only enabled in Certification Mode.

If the participant being certified is not at the appointment, in person, we must indicate why by selecting an option from the Reason Not Present dropdown.

Go ahead and click the dropdown.

<no audio> Click the Reason Not Present dropdown.

Physically Present 2

Options include Referral Data Used, which means the participant was able to provide measurements that meet MN WIC requirements for height, weight, and hemoglobin from their Health Care Provider, Measurements Deferred meaning referral data for height, weight and hemoglobin measurements from the participant's Health Care Provider will be obtained within accepted timeframes, a number of reasons why the participant may be unable to attend, and Other – See Notes, which we should select if none of these options apply, writing a General Note with the Subject of Physical Presence Exception.

Click the dropdown to close it.

<no audio> Click the Reason Not Present dropdown.

Physically Present 3

Once we touch this field, notice that if the toggle is off, the dropdown has a validation indicating it's required.

If the participant is able to attend the appointment in person, we simply toggle on Physically Present.

Go ahead and toggle it on.

<no audio> Toggle on Physically Present.

Save Demo 1

Let's click the Demographics Save button.

Save Demo 2

If we don't get a green banner indicating our information has saved, we need to review our page for the red validation messages under fields indicating they are required.

Agency Required Demo 1

Our agency can require that we complete certain fields on Demographics.

These include the Medical Clinic, Medical Provider and Local Use Questions.

Medical Clinic and Medical Provider lists are created and managed by our agency to provide options that are specific to our geographic area.

If required, they must be answered, whether we are saving Demographics while in Cert Mode or in the Participant Folder.

Agency Required Demo 2

No Selection is not an option that meets the requirement.

Agencies may choose to provide an option such as UNKNOWN that can be selected if saving Demographics and unable to obtain the information at that time.

Agency Required Demo 3

Local Use Questions can be used by agencies to collect information of interest to them.

The questions are specific to the agency and to WIC Category.

We won't go into a lot of detail now, except to mention that agencies can, again, choose to make these questions required while in Cert Mode.

Existing Participants 1

We're going to switch gears a little and talk about certifying existing participants again.

<screen description – no audio> Slide transitions from Sallie Mander Cert Mode to Search page.

Existing Participants 2

We're going to take a look at Beau Vine.

His cert ends this month, his midcert was completed in May, and his last set of benefits issued was for July, so he hasn't been issued benefits for August yet.

Go ahead and double-click on his card to open the Participant Folder.

<Waiting>

<screen description – no audio> Spin icon displays.

Enter PF 1

Unlike new participants, or those **not** in a current cert, we are able to enter information usually associated with certification into the Participant Folder prior to starting a cert.

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

Enter PF 2

However, sometimes clinic flow, or Separation of Duties requirements, lends itself to entering some information into the Participant Folder before entering certification mode.

In WINNIE, if certain information is entered **on the same date as the cert is started**, the system will recognize the record as meeting the certification requirement.

Enter PF 3

We may expect to see this most often with bloodwork and measurements, which are sometimes performed by another staff person or are provided as referral information, and income, which is necessary to meet Separation of Duties requirements, so we'll look at these as examples.

Go ahead and select Bloodwork from the sidebar.

Bloodwork 1

We have added a hemoglobin record into the Participant Folder today.

Select Length/Height/Weight from the sidebar.

Height/Weight 1

We have added a height and weight measurement into the Participant Folder today.

Select income from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Income 1

And our coworker verified and added the income into the Participant Folder today, in order to meet Separation of Duties requirements.

Collapse Clinic Actions and start a cert for Beau.

WIC STAFF 1: I just verified their income and entered it into the Participant Folder, so you should be good to go...

WIC STAFF 2: Great! Thanks!

Enter PF 4-6

<no audio> Collapse Clinic Actions and start a cert for Beau.

Enter PF 7

If we enter information into the Participant Folder on the same date as we start the cert, we must click on those pages for the certification to recognize them.

Let's do that.

Click the link for Bloodwork.

Bloodwork 2

The checkmark displays as soon as we open the page, and that's all we have to do.

<Transition Slide>

There is one caveat.

<screen description – no audio> Slide transitions to record with Measurement Date of 9/1/23.

Measurement Date 1

If we are using referral data for measurements (height/weight or blood), and the measurement date is not today's date, we can still enter it into the Participant Folder.

However, the system will not automatically add the checkmark when we open the page.

If the Measurement Date does not match the current date but is entered into the Participant Folder on the date the cert is started, we have to prompt the system to recognize it by clicking the Edit icon and clicking Save.

Once we do that, the checkmark will display indicating the cert recognizes the measurement.

<Transition Slide>

<screen description – no audio> Slide transitions to record with Measurement Date of 9/5/23.

Bloodwork 2A

OK. Let's finish this.

Go ahead and click the links for Length/Height/Weight and Income to get the checkmarks.

Height/Weight 2

<no audio> Click the links for Length/Height/Weight and Income.

<Waiting>

<screen description – no audio> Spin icon displays.

Income 2

We'll look at completing the cert in the next training module.

<Transition Slide>

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

Test Your Knowledge

True/False Q#1

We always have to click the Race/Ethnicity link under Certification/MCA on the sidebar to ensure we get a checkmark since it's required for certs.

Answer #1

The answer is False.

Once Race/Ethnicity has been completed, we do not have to click the link. The system will automatically recognize that it's already been completed.

True/False Q#2

We cannot enter measurements with a different Measurement Date into the Participant Folder on the same date as the cert because the system will not recognize it as a valid record that meets the requirement.

Answer #2

The answer is False.

We **can** enter height/weight and hemoglobin into the Participant Folder, even if it has a different Measurement Date.

However, the system doesn't automatically recognize it as meeting the requirement when the page is first opened. We have to click the Edit button then resave the record to get the checkmark to display.

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.

This institution is an equal opportunity provider.