

# Documents Overview 2 – WINNIE Online Training Module

MARCH 2023

## Introduction

### Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. This is an overview of the documents found in the Participant Menu in WINNIE, the MN WIC Information System.

### Date 1

All dates in the first sections of this module are based on today's date being March 27, 2023.

## Participant Menu Documents

### <Transition Slide>

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

### Open Folder

We are still working with Ella and Linna Ment.

We have reviewed Show Details a number of times so let's just open Ella's folder again.

### <Waiting>

<screen description – no audio> Spin icon displays along with "Working...please wait" message.

### Alert 1

Close the alert.

## Participant Menu

Once again, we are going to open our Participant Menu. Go ahead.

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

## Menu Documents

We're going to focus on the documents that automatically open in another tab in our default browser: Generate Appointment Notice and Schedule, Generate Official Notification, and Produce VOC document.

### Official Notification 1

We saw the Official Notification, or the Letter of Ineligibility, when we looked at the Manually Terminate Participant function.

Let's look at how it generates this time. Go ahead and select it.

<no audio> Select Generate Official Notification.

### Waiting

It can take a few seconds for the document to open.

### <Transition Slide>

<screen description – no audio> Clinic Services page slides down to show WINNIE browser tab.

### Official Notification 2

We don't usually print the Ineligibility Letter outside of the termination process, but we can if we need to.

Again, the documents that automatically open in the browser are PDFs and temporary, which means they are not downloaded by the browser.

### Official Notification 3

Also, since we opened this from the menu within Ella's folder, her State WIC ID is appended to the notice identifier in the browser tab.

Click below the scroll bar.

### Official Notification 4

Like all documents we may provide to participants, the federally required full non-discrimination statement is included.

<screen description – no audio> Current Non-discrimination Statement as of March 2023.

Let's leave this tab open and go back to WINNIE.

Click on the WINNIE tab.

## Open Menu 1

Open the Participant Menu.

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

## Appt Notice 1

Select Generate Appointment Notice

## Waiting 1

Be patient. As long as we've set our browser to allow pop-ups, it should open.

## Appt Notice 2

This document also provides private data, has Ella's State WIC ID in the browser tab, and is a PDF.

For now, this is just a quick overview of this document since we'll take a closer look at the Appointments Notice in the appointment training modules.

Click below the scroll bar.

## Appt Notice 3

Again, the notice has the full Non-discrimination Statement.

Let's close both document tabs.

<no audio> Click the x in this tab.

## Close Tab

<no audio> Click the x in this tab.

## <Transition Slide>

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

## Spanish Documents

## <Transition Slide>

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

## Spanish Versions

We saw previously that we can print the Multi-Purpose Affidavit on-demand in either English or Spanish.

We can also print Spanish versions of the Official Notification, Appointment Notice and Appointment Schedule, which we haven't looked at yet, by changing the Correspondence Preference.

Let's click below the scroll bar.

## Household Info

Click the Edit button.

<Waiting>

<screen description – no audio> Spin icon displays.

## HH Demo

The Household Demographics modal opens.

This is where all household-level information can be updated.

Click below the scroll bar.

## Correspondence 1

In the Language section, we have a Correspondence Preference dropdown.

This works independently of the selected languages and the read/spoken toggles.

Click the dropdown.

<no audio> Click the Correspondence Preference dropdown.

## Correspondence 2

There are only two options, and the default is English.

When the Correspondence Preference is Spanish, some WINNIE documents automatically generate in Spanish.

Go ahead and select Spanish.

## Correspondence 3

Click the Save button.

## Open Menu 2

With our Correspondence Preference now Spanish, let's re-open the Participant Menu and generate the Official Notification again. Go ahead.

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

## Spanish Official Not. 1

<hint – audio> Select Generate Official Notification.

## Waiting 2

Be patient.

## Spanish Official Not. 2

When the Correspondence Preference is Spanish, the Letter of Ineligibility is one of the documents that automatically generates in Spanish.

Notice, however, that the termination reason is still in English.

When the letter is generated, the system retrieves the description for the appropriate Termination Reason from within the database, which (at this time) is only stored in English.

Click below the scroll bar.

## Spanish Official Not. 3

Close this tab to continue.

<hint – audio> Click the x in the tab to close it.

## Open Menu 3

Let's open the Appointment Notice again. Go ahead.

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

## Spanish Appt Notice 1

<hint – audio> Select Generate Appointment Notice.

## Waiting

<screen description – no audio> Demographics page.

## Spanish Appt Notice 2

Another document that automatically prints in Spanish.

When ready, click below the scroll bar.

## Spanish Appt Notice 3

Close the tab to continue.

<hint – audio> Click the x in the tab to close it.

## <Transition Slide>

We'll look at the last Spanish document in the next section.

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

## Participant Menu Documents Continued

### Date 2

All dates in the next sections of this module are based on today's date being March 29, 2023.

## <Transition Slide>

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

## Appt Schedule 1

Since, by now, we should be very familiar with how to generate these documents, we may skip some of the steps...

For the next set of documents, a modal displays requiring some kind of input before it automatically opens in the default browser.

Select Generate Appointment Schedule.

## Appt Schedule 2

This modal allows us to enter a date range to include any scheduled appointments during that time period.

The Start Date defaults to today and the End Date is required.

We know Ella has an appointment in June, so let's generate a schedule until the end of June.

Click into the End Date field...

## Appt Schedule 2A

...and enter 6/30/23.

## Appt Schedule 3

We can print for just the participant whose folder we are in by toggling off All Household Members or include any appointments for the household.

Let's toggle it off.

<no audio> Toggle of All Household Members.

## Appt Schedule 4

Click the OK button.

## <Waiting>

<screen description – no audio> Spin icon displays.

## Spanish Appt Schedule

Remember, Ella has her Correspondence Preference set to Spanish and this is another document in our Participant Menu that prints in Spanish.

## English Appt Schedule

<screen description – no audio> Slide transitions from Spanish version to English version.

If her Correspondence Preference were set to English, the English version would automatically generate.

Click to Continue.

## Appt Schedule HH

We've opened the Participant Menu, selected the Appointment Schedule, and entered the date.

This time we're leaving the toggle on. Click OK.

<no audio> Click the OK button.

## <Waiting>

<screen description – no audio> Spin icon displays.

## Spanish Appt Schedule HH 1

The Appointment Schedule also prints in Spanish.

Take a gander at the output then click below the scroll bar.

## Spanish Appt Schedule HH2

Click the button to continue.

## English Appt Schedule HH 1

<screen description – no audio> Slide transitions from Spanish version to English version.

The English version.

Click below the scroll bar.

## English Appt Schedule HH 2

Click the button to continue.

## Open Menu 4

Open the Participant Menu.

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

## Ppt Summary 1

Our next document is the Participant Summary. Select it from the menu.

<no audio> Select Generate Participant Summary.

## Ppt Summary 2

The modal that opens displays the Start and End Date for all certification records in our database for this participant, the most recent cert at the top.

Its uses may include providing historical information, such as to verify a participant was on the WIC program during a certain time period, or to provide referral information to other programs or health care providers.

Any time we provide this type of information to someone other than the participant or proxy we must always follow our agency's procedures and Release of Information requirements.

Let's select the most recent certification.

<no audio> Click on the 11/22/2022 – 11/30/2023 row.



### Ppt Summary 3

Click OK.

<no audio> Click the OK button.

### Waiting

<screen description – no audio> Ella's Demographics page displays.

### Ppt Summary 4

The Participant Summary is a long document with a lot of private data and a comprehensive overview of the participant's selected certification period.

The first section after the agency and clinic where the participant currently belongs is information we collect in Demographics.

Next is their certification information.

Click below the scroll bar.

### Ppt Summary 5

The cert info is followed by their Authorized and Alternate Reps.

The next section is Anthropometric information, or blood and length/height/weight.

Risk Factors are next.

Followed by the contents of all food packages with an Effective Date during the cert period.

Click below the scroll bar.

### Ppt Summary 6

<screen description – no audio> Food packages with 12/7/22 and 11/22/22 are listed.

Click below the scroll bar.

### Ppt Summary 7

Next are the benefit sets issued during the cert period.

If the Nutrition Education tab is used, any individual and/or group contacts would be listed.

That's followed by the Income information used as proof of eligibility during the cert.

Click below the scroll bar.

## Ppt Summary 8

Lastly is the federally required Non-discrimination Statement.

Click below the scroll bar one more time.

## Ppt Summary 9

Done. Let's close the tab.

<hint – audio> Click the x in the tab to close it.

## Open Menu 5

Open the Participant Menu.

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

## Ppt Summary Note 1

Before we move on, let's select Manage Notes.

## <Waiting>

<screen description – no audio> Spin icon displays.

## Ppt Summary Note 2

When the Participant Summary is generated, WINNIE creates a system note.

Go ahead and re-open the Participant Menu.

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

## VOC 1

The last document that presents a modal before auto-generating is the VOC, or Verification of Certification.

Select Produce VOC Document.

## VOC 2

The statement reads: Clicking OK will produce the VOC Document, and terminating the participant is **optional**.

The MN WIC Program does NOT terminate participants when providing VOC information.

We allow the certification to be terminated by the system automatically for Failure to Pickup, categorical ineligibility or cert expired.

Click OK to generate the VOC doc.

<no audio> Click the OK button.

## Waiting

<screen description – no audio> Ella's Manage Notes page displays.

## VOC 3

The Verification of Certification document provides all the information a participant might need to transfer their current certification to another state's WIC Program.

We'll provide a more thorough review of the VOC doc in the VOC training module.

For now, take a look, click below the scroll bar, and close the tab.

## VOC 4

<no audio> Click the x to close the tab.

## Refresh

WINNIE also creates a System Note when the VOC Document is produced.

Since we are on the Manages Notes page, we may need to refresh it to see the new System Note.

Click the Refresh icon to the left of the address bar.

## <Waiting>

<screen description – no audio> Page darkens and clears.

## Alert 2

When we use the browser refresh, the alert will re-display.

Go ahead and close it.

## VOC Note

Once the page is refreshed, the new VOC Document system note displays.

Click the button to continue.

## Test Your Knowledge

## T/F Q#1

True or False?

Documents that automatically open in the default browser's tab are temporary and not downloaded to our computer.

## Answer #1

The answer is True.

Documents that automatically open in our default browser are temporary data and not downloaded by our browser.

## T/F Q#2

True or False?

If our Correspondence Preference in Household Demographics is Spanish, all documents will automatically print in Spanish.

## Answer #2

The answer is False.

Selecting Spanish for Correspondence Preference on the Household Demographic page will automatically print those documents with a Spanish template available, which currently are only the Official Notification and Appointment documents.

## 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.

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