

Initial Contacts 1A – WINNIE Online Training Module

MARCH 2024

Introduction

Intro

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

Date

All dates in the first section of this module are based on today's date being March 11, 2024.

Overview 1

The Initial Contact allows us to document whether the Processing Standards, which are federal requirements, are being met when we schedule appointments for new applicants or existing participants that meet the criteria.

Overview 2

There are two different Processing Standards.

The first ensures applicants or participants considered at special nutritional risk, which includes pregnant women, infants less than 6 months old, and migrant families are offered an appointment within 10 calendar days.

Overview 3

The second standard ensures all other applicants and existing participants whose Cert End Date is before today's date are offered an appointment within 20 calendar days.

Overview 4

The 10 and 20-day criteria are the number of calendar days between the date the appointment is first requested and the date the first appointment is offered regardless of whether it is scheduled.

<Transition Slide>

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

Open IC 1

We can open the Initial Contact using an icon on the participant card on the Search page...

Double-click to open Polly's folder...

<Waiting>

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

Open IC 2

...and by clicking the Initial Contact buttons on the Demographics page in the Participant Folder or Certification Mode, and most importantly...

Select Scheduler from the sidebar.

<Waiting>

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

Open IC 3

...the Appointments page...

Double-click on 8:30 AM in the EA11 column and select the Schedule for Household button.

<Waiting>

<screen description – no audio> Spin icon displays.

Open IC 4

<no audio> Double-click on 8:30 AM in the EA11 column and select the Schedule for Household button.

Open IC 5

...as well as when scheduling individual and household appointments.

We say most importantly because most of our Initial Contacts will be completed when scheduling appointments.

Click the Cancel button.

Open IC 6

As we've already learned in other modules, the Initial Contact is also required as part of Prescreen.

Let's start there.

Go ahead and open the Prescreen page. Click anywhere for a hint.

<audio – hint> Select Create New Household from the sidebar.

Scenario 1

Here's our scenario.

We received an online application for a new child applicant, Dewey Hafta, last Friday, March 8th and have called and are talking with mom to schedule the appointment.

We've already completed most of Prescreen.

Click below the scroll bar.

IC Modal 1

Click the Initial Contact button.

IC Modal Date

The Initial Contact modal opens.

The first 3 fields are required by the system and auto-populate.

The Date defaults to today.

Since it should represent the date an appointment was first requested, it can be changed to a date within the past 30 days.

This is the Initial Contact Date that starts the clock for the Processing Standards.

IC Modal Type 1

The Type is how the request for an appointment was made and defaults to Phone, which tends to be the most common.

Go ahead and click the dropdown.

IC & Application 1

The other options are Walk-In, Mail, and Electronic/Internet.

Many of our agencies receive online applications and we should select Electronic/Internet for these since an online application is considered a request for an appointment.

When we receive the online application, we must change the date to reflect the date the application was received by our agency.

IC & Application 2

Remember our scenario?

Select the appropriate Type then use the Calendar Control icon in the Date field to select the Initial Contact Date.

<audio – hint> Select Electronic/Internet for the Type.

Scenario: We received an online application for a new child applicant last Friday, March 8th. The application is for Dewey Hafta for whom we've already completed most of Prescreen.

IC & Application 3

<no audio> Select the appropriate Type then use the Calendar Control icon in the Date field to select the Initial Contact Date.

<audio – hint> Click the calendar icon in the Date field.

IC & Application 4

<no audio> Select the appropriate Type then use the Calendar Control icon in the Date field to select the Initial Contact Date.

<audio – hint> Select March 8.

IC Modal Category

When Initial Contact is opened in Prescreen, the WIC Category is the same as the category we selected when completing the Prescreen page.

There are no validations on this field, which means the system will allow us to select an incorrect WIC Category.

In general, in Prescreen, there should be no reason to change this.

IC Modal Appt 1

To meet the Processing Standards requirements, we must record the first date that has an available viable appointment.

The applicant or participant does not have to accept it for us to record it.

This field is not required since we might now know appointment availability yet.

We don't know, so we'll leave it blank.

IC Modal Migrant

Lastly, we should toggle on the Migrant at Initial Contact for families that have seasonal agricultural employment.

IC & EOD 1

All of the fields we've looked at so far can be edited on the date the Initial Contact record is created.

However, once End-of-Day is run, the Date, Type, WIC Category, First Appointment Offered, and the Migrant toggle are locked and cannot be changed.

Because of this, we also have a Comments field.

IC Modal Comments

We can use the Comments field to explain why no appointments are available, such as may occur with same-day or flexible scheduling, or to enter the first appointment offered if we are unable to enter it on the same day we create the Initial Contact record.

The free-form text field allows letters, numbers, and special characters, and has a limit of 500 characters.

IC Record 1

A new Initial Contact record is only good for 60 days.

When an applicant or participant is certified within 60 days of the date we created the Initial Contact record, which may be different from the Initial Contact date, as is the case with Dewey, WINNIE links the Initial Contact to the Certification.

The Comments field is editable until the Initial Contact is linked to the completed Certification.

IC Record 2

If an applicant or participant is not certified within 60 days of the Initial Contact create date, it is deleted, and a new Initial Contact will need to be created.

We'll talk about creating a new Initial Contact in a couple of minutes.

For now, let's save Dewey's Initial Contact.

<no audio> Click the OK button.

Save Prescreen

And save the Prescreen.

<no audio> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

IC & Scheduler 1

Next, we want to schedule an appointment for Dewey.

Select Scheduler from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

IC & Scheduler 2

The system does not require us to complete the Initial Contact and WINNIE will not remind us, so we will need to remember to complete it when scheduling the appointment.

Best practice is that whoever schedules the appointment should complete the Initial Contact.

Let's select INITIAL CERTIFICATION as our Appointment Type.

<no audio> Select INITIAL CERTIFICATION from the Appointment Type dropdown.

IC & Scheduler 3

<no audio> Select INITIAL CERTIFICATION from the Appointment Type dropdown.

IC & Scheduler 4

We need an hour for our cert.

We know there is nothing left today but earlier we still had appointments open tomorrow.

Click the forward icon.

WIC STAFF (thought bubble): I know there nothing left today but earlier we still had appointments open for tomorrow...

IC & Scheduler 5

<waiting> <screen description – no audio> Spin icon displays.

Let's collapse the Schedule Appointment card for some more screen real estate.

IC & Scheduler 6

Nothing available.

Click below the inner scroll bar.

IC & Scheduler 7

Same.

Click below the inner scroll bar again.

IC & Scheduler 8

We do have 15 minutes at the end of the day, but we generally don't overbook this late, so it isn't really a viable appointment.

Let's go forward one more day.

IC & Scheduler 9

<waiting> <screen description – no audio> Spin icon displays.

Here we go.

We can offer an appointment and document the Initial Contact even if this date doesn't work for them.

However, in this case, it does work.

Go ahead and schedule the appointment for 10:00 AM in the EA1 column. Click anywhere for a hint.

<audio – hint> Double-click the 10 AM cell in the EA1 column.

WIC STAFF: Does Wednesday, March 13th work for you?

PARTICIPANT: "Do you have anything around 10:00 in the morning?"

IC & Scheduler 10

<waiting> <screen description – no audio> Spin icon displays.

<audio – hint> Click the Schedule for Hafta, Dewey button.

IC & Scheduler 11

We can complete the Initial Contact while scheduling the appointment.

Click the button.

<no audio> Click the Initial Contact button.

IC & Scheduler 12

The Initial Contact record that we created during Prescreen displays.

The modal now includes both a Participant Menu that can be used when there are multiple household members and Dewey's IDs and name.

To complete the Initial Contact, we must either enter a First Appointment Offered date if we have one or a Comment as to why we don't.

Using the calendar control icon, go ahead and select 3/13 for the First Appointment Offered.

IC & Scheduler 13

<no audio> Using the calendar control icon, select 3/13 for the First Appointment Offered.

IC & Scheduler 14

The Initial Contact is done, and the record is good for 60 days.

Click Save & Close and complete scheduling the appointment.

IC & Scheduler 15

<no audio> Click Save & Close and complete scheduling the appointment.

IC & Scheduler 16

<waiting> <screen description – no audio> Spin icon displays.

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

Date 2

All dates in this section of the module are based on today's date being March 12, 2024.

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

IC & EOD 2

It's the day after we completed Dewey's Initial Contact.

Click on the Thumbprint icon in Dewey's card.

IC & EOD 3

As we mentioned earlier, once End-of-Day runs, all fields are disabled except for Comments, and we'll take a look at how and when to use this feature a little bit later.

<Slide Transition> <screen description – no audio> Slide transitions to Search page with Tory family.

Scenario 2

Let's take a look at another scenario.

Mandy Tory has walked into our clinic.

She just found out she's pregnant and was wondering if we could see her today.

Since our last two appointments were no-shows we are more than happy to help her.

We've looked her family up and her children are currently participating in WIC.

As of last October, she was also participating as non-breastfeeding.

Our agency doesn't add walk-ins to the schedule, so we have to remember to complete the Initial Contact since it's required for all pregnant women, even though we are not scheduling an appointment.

Let's do that now.

Open Mandy's Initial Contact. Click anywhere for a hint.

<audio – hint> Click the Thumbprint icon on Mandy's card.

New IC 1

The most recent Initial Contact record displays.

A New Contact button displays when there is an existing Initial Contact already linked to a cert.

As we saw with Dewey, this button will not display if an Initial Contact has been created within the last 60 days and is not yet linked to a cert.

<Slide Transition> <screen description – no audio> Slide transitions back to Dewey's Initial Contact.

New IC 2

<Slide Transition> <screen description – no audio> Slide transitions back to Mandy's Initial Contact.

We need to create a new Initial Contact record.

Go ahead and click the New Contact button.

New IC 3

The fields become enabled and the participant information and our usual defaults display.

Notice, however, that the WIC Category is blank.

For children, new contacts will default display their category since it will be correct.

For women and infants, whose categories can change, we can't assume their next certification will be as the same WIC Category, so we must select the category that matches what they are going to be when certified.

Go ahead and select her category from the dropdown.

<no audio> Select Mandy's WIC Category from the dropdown.

New IC 4

<no audio> Select Mandy's WIC Category from the dropdown.

<audio – hint> Select Pregnant.

New IC 5

Are both these default values correct?

Go ahead and select the correct value. Click anywhere for a hint.

<no audio> Select the correct value for Date or Type. Click anywhere for a hint.

<audio – hint> The Type is incorrect. Click the Type dropdown.

New IC 6

<no audio> Select the correct value for Date or Type. Click anywhere for a hint.

<audio – hint> Mandy is a walk-in. Select Walk-In.

New IC 7

We need the First Appointment Offered date or a comment to complete it.

Our First Appointment Offered is today.

Use the Calendar Control to select 3/12.

<no audio> Use the Calendar Control to select 3/12 for the First Appointment Offered.

New IC 8

<no audio> Use the Calendar Control to select 3/12 for the First Appointment Offered.

New IC 9

Save the Initial Contact.

<no audio> Click the Save & Close button.

New IC 10

Three things to note.

One. The only way to know if the Initial Contact has been completed is to re-open it.

Never assume it has been completed. It takes two clicks to double-check.

Two. We could've completed Mandy's Initial Contact on the Demographics page of the Participant Folder or while in Certification Mode.

<Slide Transition> <screen description – no audio> Slide transitions to Initial Contact modal while in Certification Mode.

New IC 11

Three. Whether the fields are all enabled or only the Comment field is, enabled fields do not disable until the cert and initial contact are linked, which occurs when the certification has been completed.

<Slide Transition> <screen description – no audio> Slide transitions to Initial Contact modal while in Certification Mode for the next day with fields disabled (except for Comments).

New IC 12

Once the cert is completed, all fields are disabled, and the New Contact button once again displays.

We'll take a look at another scenario in the next module.

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

Test Your Knowledge

Y/N Q#1

Yes or No?

Today is March 12. At our agency, we schedule appointments 3 months out. We are scheduling an appointment for a child in June whose cert ends 6/30. Do we need to create an Initial Contact when scheduling the appointment?

Answer #1

The answer is No.

We only have to create an Initial Contact if the Cert End Date is before today's date when scheduling a subsequent certification for an existing participant.

Y/N Q#2

Yes or No?

Today is March 31. We are scheduling a certification appointment in two days, on April 2nd, for Sully whose current Cert End Date is today. Do we need to create an Initial Contact when scheduling the appointment?

Answer #2

The answer is No.

We only have to create an Initial Contact if the Cert End Date is **before** today, the date we are scheduling the appointment.

Y/N Q#3

Yes or No?

Today is March 12. We are scheduling a certification appointment on June 13 for Millie who is turning one year old on 5/27. Her Cert End Date is 5/31. Do we need to create an Initial Contact when scheduling the appointment?

Answer #3

The answer is No.

We only have to create an Initial Contact if the Cert End Date is before today, not if the Cert End Date is before the appointment we are scheduling.

Y/N Q#4

Yes or No?

Today is March 12. We are scheduling a certification appointment on March 15 for a breastfeeding woman who is now pregnant and whose Cert End Date is 7/31. Do we need to create an Initial Contact when scheduling the appointment?

Answer #4

The answer is Yes.

We must create an Initial Contact for **all** pregnant women, regardless of whether they are in a current cert or not.

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.

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