VOCs 1A – New Applicants/Participants – WINNIE Online Training Module

FEBRUARY 2024

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It provides an overview of VOCs, or out-of-state transfers, for applicants who have never participated in the Minnesota WIC Program before in WINNIE, the MN WIC Information System.

Overview 1

In WINNIE, a VOC is a transfer of an applicant or participant who has been certified by another state and is in a current certification period, or in other words, they have a Cert End Date in the future.

It is an out-of-state transfer of a WIC certification.

Overview 2

VOC is also a document, Verification of Certification, which is used to confirm a participant's cert status in another state.

It is also a document that we can provide as proof of their status in MN if they are moving to another state.

Overview 3

In some cases, we may have to obtain additional information from their previous state to ensure continuity of care or clarification of VOC information.

In other instances, we may just have to start a new certification if acceptable documentation of current eligibility cannot be obtained or if their Cert End Date expires soon.

Overview 4

Although we won't be addressing this in these modules, Medical Documentation for formula approvals can be transferred to MN WIC.

Families do not need to provide new documentation from a Minnesota provider as long as the Medical Documentation from the previous state is still valid.

Overview 5

Reference: MOM Section 3.3 – Transferring Participants

Overview 6

VOCs for applicants who are new to MN WIC are completed as part of the Prescreen.

VOCs for existing participants, or people who have participated in MN WIC before, are completed within the Participant Folder.

Date 1

All dates in this module are based on today's date being February 6, 2024.

<Transition Slide>

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

Scenario 1

In these training modules, our applicants and participants have VOC documents that have adequate information from the certifying state.

Here's our first scenario.

A mother, Roe Dio, and her baby, Rae and child Stu moved from the state of Virginia, where they participated in the WIC Program.

All three were certified on October 18, 2023, based on their VOC documents, which mom brought with her.

Roe also gave us her Virginia driver's license for proof of her identification and a piece of mail with her new address on it since like "regular" certifications, we must verify proof of ID for both mom and the children, along with proof of their new residence in MN.

WIC STAFF: Welcome to WIC! Thank you for bringing your cert documents. It says that you, Roe, your baby (so sweet!), Rae, and your 3-year-old, Stu, were all certified on October 18th in Virginia...

PARTICIPANT: Yes. I was also told when I called to make this appointment that I would need to bring my ID and something with my new address on it. Hope it's OK that it's my Virginia license and mail I got yesterday…

WIC STAFF: For sure. That all works! Thanks for remembering to bring that with you as well!

Scenario 2

For children, we can use the VOC documents as proof of their ID.

> PARTICIPANT: "They also said I could use these WIC papers from Virginia as proof for my kids…"
>
> WIC STAFF: Yep. That's all we need for Rae and Stu.

Scenario 3

Once we've verified that this is their first time living in Minnesota, or that they've never participated in the MN WIC Program before, we can start the VOC process by Prescreening them.

Go ahead and open that page. Click anywhere for a hint.

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

> WIC STAFF: So, is this your first time living in Minnesota?
>
> PARTICIPANT: "Yes. We've never lived here before and so far it hasn't been as half cold as I was warned it would be…"
>
> WIC STAFF (thought bubble): Since they are new to MN WIC, I'll need to prescreen them…

<Waiting>

<screen description – no audio> Spin icon displays.

VOC Document 1

VOC documents may differ from state to state, and for the sake of this training module, this is the VOC Roe provided from Virginia for each of them.

They should all provide the basics, such as name, date of birth, WIC Category, certification period, and potentially other useful information.

Prescreen 1

Let's complete the Prescreen.

Type Dio into the Last Name field.

Prescreen 2

Click or Tab into the First Name field and Type Roe.

Prescreen 3

<no audio> Click or Tab into the First Name field and Type Roe.

Prescreen 4

Click into the Date of Birth field and type 5/27/91.

Prescreen 5

<no audio> Click into the Date of Birth field and type 5/27/91.

Prescreen 6

Select Breastfeeding for the WIC Category.

Prescreen 7

<no audio> Select Breastfeeding for the WIC Category.

Prescreen 8

We are going to complete the rest of the prescreen behind the scenes.

<screen description – no audio> Slide transitions to completed demographic information.

Prescreen 9

<screen description – no audio> Slide transitions to lower half of Prescreen page and completed How Heard about WIC (Previously Participated).

VOC 1

We toggle on VOC Certification to indicate the applicant is currently certified by another state and that the required VOC documentation has been provided.

Toggle it on.

<no audio> Toggle on VOC Certification.

VOC 2

The Initial Contact button becomes disabled when we toggle on VOC because it is included in the VOC process as we'll see in a minute.

We will be adding two more members to the household.

Select Add Another Member from the On Completion dropdown.

VOC 3

<no audio> Select Add Another Household Member from the On Completion dropdown.

VOC 4

And save the Prescreen.

<no audio> Click the Save button.

VOC Category

The VOC Certification modal automatically opens after we save the Prescreen and the WIC Category we selected in Prescreen displays.

VOC Cert End Date 1

The Certification End Date is required.

Regardless of what the VOC document may show is the Cert End Date, we must enter a Cert End Date that reflects the MN WIC Program's certification periods, which is always until the last date of the month in which their cert ends based on their WIC Category.

<Transition Slide>

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

VOC Cert End Date 2

Some VOC documents may only provide the Cert Start Date, which means we need to be familiar with cert lengths.

We already reviewed certification periods in detail in the Certification training modules.

The following is a list of certification periods.

Review if you want and click the button to continue.

<screen description – no audio>
- INFANTS < 6 MONTHS = last date of month infant turns one year old (DOB = 3/15/24; 1-Yr DOB = 3/15/25; Cert End = 3/31/25)

- INFANTS $\geq$ 6 MONTHS = Cert Start Date + 6 months extended to last date of that month (DOB = 5/15/23; Cert Start = 12/15/23; Cert + 6 Mo = 6/15/24; Cert End = 6/30/24)

- CHILDREN = Cert Start Date + 1 year extended to last date of that month (Cert Start = 3/15/24; Cert + 1 Year = 3/15/25; Cert End = 3/31/25)

- CHILDREN > 4 YEARS OLD = Last date of month they turn 5.

- PREGNANT= Expected Delivery Date + 6 weeks extended to last date of that month
  (EDD = 3/15/24; EDD + 6 Weeks = 4/26/24; Cert End = 4/30/24)

- BREASTFEEDING = Infant's DOB + 1 Year extended to last date of that month
  (Infant's DOB = 3/15/24; Infant's DOB + 1 Year = 3/15/25; Cert End = 3/31/25)

- NON-BREASTFEEDING = Infant's DOB + 6 Months extended to last date of that month
  (Infant's DOB = 3/15/24; Infant's DOB + 6 Mo = 9/15/24; Cert End = 9/30/24)

VOC Cert End Date 3

Roe's infant was born on 10/13/23.

She was certified on 10/18/23.

Based on what we just reviewed, what is her Cert End Date?

10/13/24, 10/18/24, 10/31/24, 4/13/24, 4/18/24, or 4/30/24?

Click on the correct answer then click the button to continue.

VOC Cert End Date 4

Go ahead and click into the Cert End Date field and type her Cert End Date in the format of mm/dd/yy.

VOC Cert End Date 5

<no audio> Click into the Cert End Date field and type her Cert End Date in the format of mm/dd/yy.

VOC Date Fields 1

Since Roe is postpartum, the Expected Delivery Date and LMP Start Date are disabled.

<Transition Slide>

However, if she were pregnant…

<screen description> Slide transitions to VOC Cert modal with Pregnant as WIC Category…

VOC Date Fields 2

…they would be enabled.

The fields work together.

If we enter an Expected Delivery Date…

Go ahead and click into the field and type 5/15/24.

<no audio> Click into the Expected Delivery Date field and type 5/15/24.

VOC Date Fields 3

<no audio> Click into the Expected Delivery Date field and type 5/15/24.

VOC Date Fields 4

Click somewhere outside of the field or press the Tab key…go ahead…

<no audio> Click outside of the field or press the Tab key on the keyboard.

VOC Date Fields 5

…the LMP Start Date is automatically calculated.

It works in the other direction too.

If we enter or change the LMP, the EDD is re-calculated.

<Transition Slide>

<screen description> Slide transitions to back to VOC Cert modal for Roe.

VOC Date Fields 6

Since Roe is postpartum, the Actual Delivery Date, is required.

Let's click into the Actual Delivery Date field and enter her baby's birthdate, which was 10/13/23.

<no audio> Click into the Actual Delivery Date field and type 10/13/23.

VOC Date Fields 7

<no audio> Click into the Actual Delivery Date field and type 10/13/23.

VOC Date Fields 8

<no audio> Click Box.

VOC Date Fields 9

There are a number of validations to ensure the dates entered make sense relative to one another and are within parameters set on the backend.

However, it won't ensure that it's the last date of the month for the Cert End Date – so we will just have to remember that!

VOC BF Amount 1

Because she is breastfeeding, the Breastfeeding Amount is also required.

If she were non-breastfeeding…

<screen description> Slide transitions to VOC Cert modal for non-breastfeeding woman.

VOC BF Amount 2

…it would be disabled.

<screen description> Slide transitions back to VOC Cert modal for Roe.

VOC BF Amount 3

Go ahead and click the Breastfeeding Amount dropdown.

VOC BF Amount 4

Our options are Fully, Mostly and Some, which we'll define based on the amount of formula that WIC provides.

Fully means we aren't providing any formula.

Mostly means we are providing a partial amount of formula.

Some means we are providing more than the maximum allowed for a mostly-breastfed infant up to the same amount we would provide to a non-breastfeeding infant.

VOC BF Amount 5

When we talk with mom about how breastfeeding is going, and whether she is using any formula, we can usually get a good idea which amount is appropriate.

It's not written in stone though. We can always change it on the Health Information page if we need to.

Go ahead and select Mostly-Breastfeeding.

> WIC STAFF: How has breastfeeding been going for you…?
>
> PARTICIPANT: "Pretty good. I've been using formula since the beginning of the year but only when I really need to...usually about half a can a week."
>
> WIC STAFF (THOUGHT BUBBLE): Hmmm. It sounds like she's probably mostly-breastfeeding.

VOC Active Question

This grayed out question is always disabled in Prescreen because she's new and it's asking if she has an existing pregnancy record.

We'll take a closer look fin our overview of VOCs for existing participants.

VOC Priority 1

We saw Priority before when reviewing the Status Information modal.

It's typically auto-assigned by the system and a VOC is no different.

Priority is not required.

Let's open the dropdown.

<no audio> Click the Priority dropdown.

VOC Priority 2

Only the priorities that can be applied to the WIC Category display.

If we don't select a priority, the system will assign it based on the WIC Category and Risk Factors.

The system will assign 502-Transfer of Certification when we complete the VOC, which has a comparatively lower priority than other risk factors.

VOC Priority 3

WINNIE will never over-write the priority we select to assign a lower priority (or higher number).

It will only assign a new priority if upon risk factor assessment, the priority is higher than what we've selected.

Roe's VOC doc shows her priority as 1, which is our highest priority.

Go ahead and select it.

<no audio> Select 1 from the Priority dropdown.

VOC Initial Contact 1

As we know, WINNIE requires us to complete the Initial Contact as part of Prescreen.

This system requirement doesn't change now that it has been moved to the VOC modal.

However, **MN WIC does not require** an Initial Contact for VOCs because the applicant is already in a current certification. (Reference: MOM, Section 3.3)

So, although we have to create an Initial Contact record, we do not have to document anything else.

Go ahead and click the Initial Contact button.

VOC Initial Contact 2

All we do is click the OK button.

VOC Initial Contact 3

And the Initial Contact is done, as is the VOC.

Click the OK button.

<Waiting>

<screen description – no audio> Page returns to Prescreen the spin icon displays.

Infant 1

Since our focus is the VOC, we are going to complete the required fields for her baby, Rae.

<screen description – no audio> Last Name = Dio, First Name = Rae, Date of Birth = 10/13/23, WIC Category = Infant, Gender = Female.

We have a VOC document for Rae as well.

Her birth date is 10/13/23 and priority is also 1.

Click below the scroll bar, toggle on VOC, select Add Another Household Member, and save.

Infant 2

<no audio> Click below the scroll bar, toggle on VOC, select Add Another Household Member, and save.

VOC Infant 1

The requirements, if the fields are enabled, are the same for all WIC categories.

Let's start with the Cert End Date.

Rae's birth date is 10/13/23. Go ahead and enter Rae's Cert End Date in the format of mm/dd/yy.

<audio – hint> Click into the Cert End Date field.

VOC Infant 2

<no audio> Rae's birth date is 10/13/23. Enter Rae's Cert End Date in the format of mm/dd/yy.

<audio – hint> Infants are certified until the last date of the month they turn one year old. Type 10/31/24.

VOC Infant 3

Click the Breastfeeding Amount dropdown.

VOC Infant 4

The options are the same except that the infant's list includes Non-Breastfeeding, which means only formula fed.

We want to select the same as mom.

Select Mostly-Breastfeeding.

VOC Infant 5

Complete the VOC from here.

Select priority of 1, complete the initial contact requirement, and save the VOC.

<no audio> Complete the VOC. Select priority of 1, complete the initial contact requirement, and save the VOC.

VOC Infant 6-7

<no audio> Complete the VOC. Select priority of 1, complete the initial contact requirement, and save the VOC.

VOC Infant 8

<no audio> Complete the VOC. Select priority of 1, complete the initial contact requirement, and save the VOC.

<audio – hint> All we have to do is click the OK button.

<Waiting>

<screen description – no audio> Spin icon displays.

Child 1

Lastly, let's VOC Roe's son Stu.

As before, we are going to complete the required Prescreen fields behind the scenes.

Stu also has a VOC document.

He was certified on 10/18/23 and his priority was 3.

Go ahead and click below the scroll bar, toggle on VOC, this time select Return to Participant List, and save.

Child 2

<no audio> Click below the scroll bar, toggle on VOC, and save.

VOC Child 1

This time, we'll have the system assign a Priority.

Stu was certified on 10/18/23.

Enter his Cert End Date, complete the Initial Contact requirement, and save the VOC.

<audio – hint> Click or tab into the Certification End Date field.

VOC Child 2

<no audio> Stu was certified on 10/18/23. Enter his Cert End Date, complete the Initial Contact requirement, and save the VOC.

<audio – hint> Children are certified for one year, extended to the last date of the month. Type 10/31/24.

VOC Child 3

<no audio> Stu was certified on 10/18/23. Enter his Cert End Date, complete the Initial Contact requirement, and save the VOC.

<audio – hint> Click the Initial Contact button.

VOC Child 4

<no audio> Stu was certified on 10/18/23. Enter his Cert End Date, complete the Initial Contact requirement, and save the VOC.

<audio – hint> All we have to do is click the OK button.

VOC Child 5

<no audio> Stu was certified on 10/18/23. Enter his Cert End Date, complete the Initial Contact requirement, and save the VOC.

<Waiting>

<screen description – no audio> Spin icon displays.

MCA Due Date 1

Since we didn't have any search criteria before starting our Prescreen, our new family displays at the top of the Search Results.

After a VOC, as long the Cert End Date is more than 6 months in the future, WINNIE calculates an MCA Due Date.

For infants, the system calculates 9 months from their Date of Birth.

Click on Roe's card.

<no audio> Click on Roe's card to view her details.

MCA Due Date 2

The system subtracts 6 months from their Cert End Date if a breastfeeding woman or...

Click on Stu's card.

<no audio> Click on Stu's card to view his details.

MCA Due Date 3

...if a child.

There's a lot of other information we must complete in the Participant Folder as part of the VOC, which we'll take a look at in the next module.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

We don't have to create an Initial Contact record when completing a VOC because MN WIC does not require one if the participant is in a current certification period.

Answer #1

The answer is False.

Although MN WIC does not require an Initial Contact for VOCs, WINNIE does. We can create and complete the Initial Contact record in two steps: click the Initial Contact button then click the OK button on the Initial Contact modal.

T/F Q#2

True or False?

We cannot use Medical Documentation from the transferring state. The family must provide Medical Documentation from a Minnesota Provider to continue receiving the medical formula.

Answer #2

The answer is False.

We can use Medical Documentation from another state as long as the Medical Documentation from the transferring state is still valid.

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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