

VOCs 1B – Documentation Requirements – WINNIE Online Training Module

FEBRUARY 2024 (REV. 5/24)

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is an overview of how to complete documentation requirements for VOC certified applicants who have never participated in the Minnesota WIC Program before in WINNIE, the MN WIC Information System.

Overview 1

For VOCs, we must verify proof of identity and residence just like any other certification.

For identity proof, the VOC Document can be used for infants and children only.

Adult participants must show another proof.

If the parent or guardian is not participating in WIC, they must show proof of ID and their name must be documented in the appropriate Representative fields.

Overview 2

We can document identity and residence for VOC participants using the Proofs modal found in the Participant Menu because the VOC begins a new certification period.

Overview 3

If the family is unable to provide proof at the time of the VOC, whether it is the adult who is unable to provide proof of their ID or they are unable to provide proof of their current residence and we **are** issuing benefits, we should issue only one month and create a priority alert to inform the next staff person what needs to be verified before more benefits can be issued.

If the family cannot provide proof at all of one or the other, we would complete the Multi-Purpose Affidavit.

Overview 4

Along with providing other WIC services we'll mention briefly later, we must also document the source of the transfer information in the Participant Folders of all VOC'd family members.

We can do this using the VOC documents, either by scanning each hard-copy or importing each electronic version (whichever is provided), or we can write a General Note with the subject of Transfer Information.

The note should document both the source of the VOC information as well as any other information necessary to facilitate continuity of care.

Policy Reference

Reference for this information is MOM, Section 3.3 Transferring Participants under the Out-of-State Transfers section.

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 with Dio family in results card.

Scenario 1

In the last module, we performed VOCs, or out-of-state transfers, for Roe, a breastfeeding woman, her infant Rae, and her child, Stu, none of whom had ever participated in the MN WIC Program before.

Roe had given us her Virginia driver's license for her proof of identification and a piece of mail with her new address on it, and we can use the VOC docs as ID proof for Rae and Stu.

Although we've technically completed the VOCs, there is still work that needs to be done in the Participant Folder, as well as some information we are going to take a look at.

Double-click on Stu's card to open his Participant Folder.

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...

VOC Alerts

The system alerts display for VOC'd participants to remind us to create a food prescription.

Go ahead and close the alert.

Document Proofs 1

Let's begin with our documentation requirements.

We can enter our proof of Identity and Residence into the Proofs modal because the VOC is a new certification record.

Go ahead and open it. Click anywhere for a hint.

<no audio> Open the Proofs modal. Click anywhere for a hint.

<audio – hint> The Proofs modal is found in the Participant Menu. Click the participant's name on the header.

Document Proofs 2

<no audio> Open the Proofs modal. Click anywhere for a hint.

<audio – hint> Select Proofs.

Document Proofs 3

The Dio's residence proof was mail with their new address on it.

Select the appropriate option from the Proof of Residence dropdown.

Document Proofs 4

<no audio> Select the appropriate option from the Proof of Residence dropdown.

Document Proofs 5

Click the Proof of Identification dropdown.

Document Proofs 6

The VOC document is our proof.

A VOC is an Out-of-State Transfer.

Select Out-of-State Transfer and save.

Document Proofs 7

<no audio> Click the Save button.

Document Proofs 8

Let's document the same proofs for the infant, Rae.

Go ahead. Click anywhere for a hint.

<audio – hint> Click the Participant Menu.

Document Proofs 9

<no audio> Document the same proofs for the infant, Rae. Click anywhere for a hint.

<audio – hint> Select Dio, Rae from the Other Household Members list.

Document Proofs 10

<no audio> Document the same proofs for the infant, Rae. Click anywhere for a hint.

<audio – hint> Click the Participant Menu.

Document Proofs 11

<no audio> Document the same proofs for the infant, Rae. Click anywhere for a hint.

<audio – hint> Select Proofs.

Document Proofs 12

Remember, Proof of Residence is household-level, so we only have to select it once.

Continue.

<no audio> Document the same proofs for the infant, Rae. Click anywhere for a hint.

<audio – hint> Click the Proof of Identification dropdown.

Document Proofs 13

<no audio> Document the same proofs for the infant, Rae. Click anywhere for a hint.

<audio – hint> Select Out-of-State Transfer.

Document Proofs 14

<no audio> Document the same proofs for the infant, Rae. Click anywhere for a hint.

<audio – hint> Click the Save button.

Document Proofs 15

Lastly, document Roe's ID proof, which was her driver's license.

Go ahead. Click anywhere for a hint.

<no audio> Document proof of ID (driver’s license) for Roe. Click anywhere for a hint.

<audio – hint> Click the Participant Menu.

Document Proofs 16

<no audio> Document proof of ID (driver’s license) for Roe. Click anywhere for a hint.

<audio – hint> Select Dio, Roe from the Other Household Members list.

Document Proofs 17

<no audio> Document proof of ID (driver’s license) for Roe. Click anywhere for a hint.

<audio – hint> Click the Participant Menu.

Document Proofs 18

<no audio> Document proof of ID (driver’s license) for Roe. Click anywhere for a hint.

<audio – hint> Select Proofs.

Document Proofs 19

<no audio> Document proof of ID (driver’s license) for Roe. Click anywhere for a hint.

<audio – hint> Click the Proof of Identification dropdown.

Document Proofs 20

<no audio> Document proof of ID (driver’s license) for Roe. Click anywhere for a hint.

<audio – hint> Select Driver’s License.

Document Proofs 21

<no audio> Document proof of ID (driver’s license) for Roe. Click anywhere for a hint.

<audio – hint> Click the Save button.

Document Transfer 1

We also need to document the source of the transfer information and any other info that might help provide continuity of care either by scanning or importing each VOC document or by writing a note.

We’re going to document these VOCs in a note.

We are going to use our shortcut of creating an alert and copying to a note for all household members.

Go ahead and get the alert started. Click anywhere for a hint.

<audio – hint> Select Manage Alerts.

<Waiting>

<screen description – no audio> Spin icon displays.

Document Transfer 2

<no audio> Get the alert started. Click anywhere for a hint.

<audio – hint> Click the Add button.

Document Transfer 3

We'll skip the subject because we aren't keeping this alert.

Let's click into the Alert Text field and we'll quickly type our note.

<screen description – no audio> We don't select a subject since it doesn't transfer to the note.

Document Transfer 4

We include the source of the transfer information and for whom, that we entered, or are going to enter, the risk factors provided by the VOC doc, and Stu's hgb measurement on 10/18/23 of 10.1, since that is worth noting.

<screen description – no audio> Alert/Note contents:

VOC documents from the state of Virginia WIC Program for Roe, Rae, and Stu. Entered risk factors provided by VOC doc. Stu had a hgb measurement on 10/18/23 of 10.1 – no other measurements worth noting.

Document Transfer 5

Go ahead and save the alert.

<no audio> Click the Save button.

Document Transfer 6

Copy to a note. Follow any cues that display. Click anywhere for hints.

<audio – hint> Click the Copy to Note button.

Document Transfer 7

<no audio> Copy to a note. Follow any cues that display. Click anywhere for hints.

<audio – hint> Click the Subject dropdown.

Document Transfer 8

Click below the scrollbar twice to find the correct subject.

<no audio> Copy to a note. Follow any cues that display. Click anywhere for hints.

<no audio> Click the scrollbar.

Document Transfer 9

<no audio> Copy to a note. Follow any cues that display. Click anywhere for hints.

<no audio> Click the scrollbar.

Document Transfer 10

<no audio> Copy to a note. Follow any cues that display. Click anywhere for hints.

<audio - hint> Select Transfer Information.

Document Transfer 11

<no audio> Copy to a note. Follow any cues that display. Click anywhere for hints.

<audio - hint> It's fewer clicks to toggle on Copy to select all members at once.

Document Transfer 12

<no audio> Copy to a note. Follow any cues that display. Click anywhere for hints.

<audio - hint> Click the Save button.

Document Transfer 13

Once again, the alert has served its purpose and we no longer need it.

Go ahead and delete it.

<Waiting>

<screen description – no audio> Spin icon displays.

Document Transfer 14

<no audio> Delete the alert.

Document Transfer 15

Since we're training, let's double-check the note.

Open the Notes page.

<no audio> Select Manage Notes from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Document Transfer 16

Yep. The note is in Roe's folder...

<screen description – no audio> Slide transitions to Rae's Notes page.

Document Transfer 17

...Rae's folder...

<screen description – no audio> Slide transitions to Stu's Notes page.

Document Transfer 18

...and Stu's folder.

<screen description – no audio> Slide transitions to Stu's Notes page.

We're going to stay in Stu's folder.

We still have a number of things to do in the Participant Folder to complete the VOCs, but first let's take a look at a couple of things.

Let's start with Certification History.

Select that from the sidebar.

<no audio> Select Certification History.

<waiting>

<screen description – no audio> Spin icon displays.

VOC Cert Info 1

VOCs do not display in Certification History because it is a snapshot of what occurs while in Certification Mode.

VOCs display on the Risk Factors page.

Collapse the Clinic Actions menu...

<no audio> Click Clinic Actions to collapse its menu.

VOC Cert Info 2

...and select Risk Factors from the sidebar.

<waiting>

<screen description – no audio> Spin icon displays.

VOC Cert Info 3

The VOC Certification Period begins today and ends with the cert end date we entered into the VOC modal.

Upon completion of a VOC, the system auto-assigns Risk Factor 502-Transfer of Certification, which is how we know a VOC was performed.

WINNIE also assigns a Priority if we didn't select one in the VOC modal.

Do you remember where to find the Priority? Go ahead. Click anywhere for a hint.

<audio – hint> Click the Participant Menu or the participant's name in the top right of the header.

Priority 1

<no audio> Do you remember where to find the Priority? Click anywhere for a hint.

<audio – hint> Select Status Information.

Priority 2

In the last module, we didn't select a Priority for Stu, so the system assigned a priority appropriate for his WIC Category and assigned Risk Factor 502.

If we select Roe from the Participant Menu in this modal...

<no audio> Select Roe from the Status Information Participant menu.

Priority 3

<no audio> Select Roe from the Status Information Participant menu.

Priority 4

...we can see that the system did not over-write our selected priority with a lower one despite only Risk Factor 502 being assigned so far.

Go ahead and close this modal.

<no audio> Click the Close button.

Conclusion

We'll complete our VOC tasks in the next training module.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

The VOC Document is a valid proof of identification for all family members.

Answer #1

The answer is False.

The VOC Document can only be used as proof of identity for infants and children. Adult participants must provide an alternative form of identification.

Multiple Choice Q#2

Which statement is NOT true for VOCs?

- A. We must document the source of the transfer information.
- B. We should document any information that helps provide continuity of care.
- C. We only have to review the proofs; we do not need to enter the proofs into the system.
- D. We should only issue one month of benefits if the family is unable to provide proof of ID or current residence at the time of the VOC.
- E. We can scan or import the VOC document to document the source of the transfer information.

Answer #2

The answer is C.

With VOCs we are transferring certification information, which means a new certification record is being created.

Proof of identity and residence are required for certifications and the proofs should be entered into the Proofs modal in the Participant Folder.

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.