VOCs 2A – Existing 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 is an overview of VOCs, or out-of-state transfers, for existing MN WIC participants in WINNIE, the MN WIC Information System.

Date 1

All dates in this module are based on today's date being February 13, 2024.

<Transition Slide>

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

Scenario 1

In this module, we will review completing VOCs from within the Participant Folder for existing MN WIC participants.

This is our scenario.

Polly Ester and her sons, Terry and Wash Clauth, have moved back to Minnesota after having lived in Maine for the past few years.

We asked Polly if she or her sons had ever participated in the MN WIC Program before and Polly told us they had before they moved.

She also told us she was pregnant and they all three just had appointments in Maine and that she brought the documents they gave to her at their last appointment.

> WIC PARTICIPANT: "We just moved back to Minnesota after having lived in Maine for the past year…"
>
> WIC STAFF: Were you and your sons part of the MN WIC Program when you lived in Minnesota before?
>
> WIC PARTICIPANT: "Yep. We got WIC here in Minnesota before we moved."

> WIC PARTICIPANT: "I'm pregnant and we all just had appointments in Maine before we moved back. They gave me these papers as proof."

Scenario 2

We will need a different proof of identity for Polly since we can only use the VOC Documents as proof of ID for the children.

We also need to verify proof of their current residence.

Polly has her Social Security card but forgot to bring anything with her current address on it, which means we will only be able to issue one month of benefits and will need to write an alert.

> WIC STAFF: Great! We can use those as proof of ID for Terry and Wash, but we'll need another form of ID for you as well as something with your current address on it.
>
> PARTICIPANT: "When I called WIC to make this appointment, she told me I needed to bring ID for me and proof of my new address. I have my social security card but forgot anything with my address on it."
>
> WIC STAFF: No worries. You can bring it in or use our App to send it to us. We will issue one month of food benefits today and the rest once we are able to see something with your address on it.
>
> WIC STAFF (thought bubble): I'll need to remember to write an alert…

Search 1

We are going to search for Polly by Last Name (Ester) and her Date of Birth, 5/27/00 (using m/dd/yy format).

Go ahead. Click anywhere for a hint.

<audio – hint> Polly hasn't participated in MN WIC for a couple of years, which means she'll be in Agency 88. Click Statewide.

Search 2

<no audio> Search for Polly by Last Name (Ester) and her Date of Birth, 5/27/00 (using m/dd/yy format). Click anywhere for a hint.

<audio – hint> Click into the Participant Last Name field.

Search 3

<no audio> Search for Polly by Last Name (Ester) and her Date of Birth, 5/27/00 (using m/dd/yy format). Click anywhere for a hint.

<audio – hint> Type Polly's last name: E-s-t-e-r.

Search 4

<no audio> Search for Polly by Last Name (Ester) and her Date of Birth, 5/27/00 (using m/dd/yy format). Click anywhere for a hint.

<audio – hint> Click into the Participant Date of Birth field.

Search 5

<no audio> Search for Polly by Last Name (Ester) and her Date of Birth, 5/27/00 (using m/dd/yy format). Click anywhere for a hint.

<audio – hint> Type Polly's birth date in the format month-slash-day-day-slash-year-year: 5/27/00.

Search 6

<no audio> Search for Polly by Last Name (Ester) and her Date of Birth, 5/27/00 (using m/dd/yy format). Click anywhere for a hint.

<audio – hint> Click the Search button or press the Enter key.

Search 7

Find the rest of her household. Click anywhere for a hint.

<audio – hint> Click the Household ID link on Ester's card.

Transfer 1

VOCs for existing participants are completed while in the Participant Folder, which means we will first need to transfer our family out of Agency 88 and into our agency.

Double-click on Terry's card and complete the transfer.

Transfer 2-3

<no audio> Double-click on Terry's card and complete the transfer.

Transfer 4 (Alert)

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

The alert is from 2020 so let's delete that.

Delete the alert, close the modal, and complete the transfer.

Transfer 5-6 (Alert)

<no audio> Delete the alert, close the modal, and complete the transfer.

Transfer 7

<no audio> Delete the alert, close the modal, and complete the transfer.

<audio – hint> We must click the Send eWIC Data button to complete the transfer.

<waiting>

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

Update Demo 1

Transfer completed.

Since we performed an in-state transfer, we need to update their address and may need to update their representatives.

We also need to assign a WIC Card.

So that we don't forget, let's begin by updating their Physical Address and Mailing Address, which we jotted down earlier.

The contact number is the same.

Select Demographics from the sidebar.

Update Demo 2

Click below the scrollbar.

Update Demo 3

Click the Edit button.

Update Demo 4-5

Click three times in the address field to highlight the current address.

Update Demo 6

Type Polly's new address: 456 Nowhere Street.

Update Demo 7

We have to select our county before selecting our city.

Click the County dropdown.

Update Demo 8

Click below the scrollbar and select Hennepin.

<no audio> Click below the scrollbar.

Update Demo 9

<no audio> Select Hennepin.

Update Demo 10

Finish the address.

Click the City dropdown, click below the scrollbar, select Minneapolis, click the Zip Code dropdown, and select 55407.

Update Demo 11

<no audio> Click the City dropdown, click below the scrollbar, select Minneapolis, click the Zip Code dropdown, and select 55407.

Update Demo 12

Like in Prescreen, we can copy the Physical Address.

Click the button then save our changes.

<no audio> Click the Copy Physical Address button.

Update Demo 13

<no audio> Click the Save button.

Update Demo 14

The mailing address won't update until we communicate the change with the WIC Processor.

To do that, which page do we open? Go ahead. Click anywhere for a hint.

<no audio> Which page do we open to communicate the Mailing Address change with the WIC Processor? Click anywhere for a hint.

<audio - hint> Select Manage eWIC Account from the sidebar.

Update Demo 15

No matter which page we are attempting to open, a message reminding us that we must communicate the Mailing Address change always displays when we try to leave the Demographics page.

Click OK.

<no audio> Click the OK button.

Manage Account 1

Before we click the Send eWIC Data button, let's add her alternate representative, Ray Ohn, a family friend, and assign her WIC Card number 6107279300000121, both of which we've jotted down.

Click the Add Representative button.

Manage Account 2

Click into the First Name field, type Ray, click into the Last Name field, type Ohn, select Family Friend from the Relationship dropdown, and save.

<no audio> Click into First Name, type Ray, click into Last Name, type Ohn, select Family Friend from Relationship dropdown, and save.

Manage Account 3

<no audio> Click into First Name, type Ray, click into Last Name, type Ohn, select Family Friend from Relationship dropdown, and save.

Manage Account 4

Now let's do what we need to do to assign a card to Polly.

We don't have a card reader, so we will have to type the card number manually.

Go ahead. Click anywhere for hints.

<no audio> Do what we need to assign a WIC Card to Polly. Click anywhere for hints.

<audio – hint> Click the Authorized Rep row to select it.

Manage Account 5

<no audio> Do what we need to assign a WIC Card to Polly. Click anywhere for hints.

<audio – hint> Click the Set Primary button.

Manage Account 6

<no audio> Do what we need to assign a WIC Card to Polly. Click anywhere for hints.

<audio – hint> Click the Primary Cardholder row to select it.

Manage Account 7

<no audio> Do what we need to assign a WIC Card to Polly. Click anywhere for hints.

<audio – hint> Click the Assign Card button.

Manage Account 8

<no audio> No card reader. Type the card number manually.

<no audio> Do what we need to assign a WIC Card to Polly. Click anywhere for hints.

<audio- hint> Type: 6107279300000121 (make sure there are 5 zeros between the 3 and 1).

Manage Account 9

<no audio> Do what we need to assign a WIC Card to Polly. Click anywhere for hints.

<audio- hint> Click the Save button.

Manage Account 10

Our SWIPe is open.

Let's Send eWIC Data and capture Polly's signature.

<no audio> Click the Send eWIC Data button and capture Polly's signature.

Manage Account 11

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

<no audio> Click the Send eWIC Data button and capture Polly's signature.

VOC Overview 1

OK. We're done managing the eWIC account, which we could have done later but just kind of made to sense to do now.

Again, it all depends on our own clinic flow.

Next, let's actually complete the VOCs.

Open the Participant Menu.

VOC Overview 2

VOC Certification is only available if the participant does not have a current certification record in WINNIE.

Select it from the menu.

<no audio> Select VOC Certification.

VOC Overview 3

The same VOC modal we saw when VOC certifying new applicants in Prescreen displays.

The WIC Category defaults based on their current WIC Category or the category that displays on their Demographics page.

For infants and children this will be correct.

For women, we may need to select the appropriate WIC Category.

All of the other fields work exactly the same.

The Certification End Date is always the last date of the month the cert ends and is always required.

The other date fields and Breastfeeding Amount enable as appropriate, and when they are enabled, they are required.

Priority is optional and will be assigned by the system if left blank.

If we select a priority based on VOC documentation, the system will not over-write a higher priority even if not supported by assigned risk factors as long as they are VOC certified.

Since this isn't Prescreen, Initial Contact is NOT required as part of the VOC.

VOC Child 1

We're VOC certifying Terry and fun fact…Maine uses SPIRIT just like we do, so their VOC document looks just like ours.

Let's jot down his Risk Factor for later.

VOC Child 1A

It doesn't appear that Maine certifies until the end of month, which we always do.

Since Terry is 4 years old, his Cert End Date is going to be the last date of the month in which he turns 5 or May 31, 2024.

Go ahead and enter his Cert End Date of 5/31/24.

VOC Child 2

<no audio> Enter Terry's Cert End Date of 5/31/24.

VOC Child 3

We are going to leave his Priority blank because the system will assign it for us.

Click the OK button to complete the VOC.

<waiting>

<screen description – no audio> Spin icon displays.

VOC Child 4

Next, Wash. We need to be in his folder to VOC him.

Go ahead and open Wash's folder.

<audio – hint> Click the Participant Menu.

VOC Child 5

Now that Terry has been VOC certified, and is in a current cert period, the VOC Certification option is disabled and a new option, Produce VOC Document, displays.

Finish opening Wash's folder.

<no audio> Open Wash's folder.

VOC Child 5A

Here's Wash's VOC document.

First, let's jot down his risk factors.

VOC Child 6

Wash is certified for one year.

His Cert End Date is one year from the Cert Start Date and to the end of that month, so 12/31/24.

Wash's priority is a 3, which is a higher priority than the 5 assigned with Risk Factor 502.

Go ahead and complete Wash's VOC.

Enter 12/31/24 for his Cert End Date and select a Priority of 3. Click anywhere for hints.

<audio – hint> Click the Participant Menu.

VOC Child 7

<no audio> Complete Wash's VOC. Enter 12/31/24 for his Cert End Date and select a Priority of 3. Click anywhere for hints.

<audio – hint> Select VOC Certification.

VOC Child 8

<no audio> Complete Wash's VOC. Enter 12/31/24 for his Cert End Date and select a Priority of 3. Click anywhere for hints.

<audio - hint > Click into the Certification End Date field.

VOC Child 9

<no audio> Complete Wash's VOC. Enter 12/31/24 for his Cert End Date and select a Priority of 3. Click anywhere for hints.

<audio - hint> Type 12/31/24

VOC Child 10

<no audio> Complete Wash's VOC. Enter 12/31/24 for his Cert End Date and select a Priority of 3. Click anywhere for hints.

<audio - hint> Click the Priority dropdown.

VOC Child 11

<no audio> Complete Wash's VOC. Enter 12/31/24 for his Cert End Date and select a Priority of 3. Click anywhere for hints.

<audio - hint> Select 3.

VOC Child 12

<no audio> Complete Wash's VOC. Enter 12/31/24 for his Cert End Date and select a Priority of 3. Click anywhere for hints.

<audio - hint> Click the OK button.

<waiting>

<screen description – no audio> Spin icon displays.

VOC Woman 1

One more VOC: Polly.

Go ahead and open Polly's folder then open the VOC modal.

VOC Woman 2

<no audio> Open Polly's folder then open the VOC modal.

VOC Woman 3

We're going to VOC certify Polly until the end of August, so 8/31/24.

Her Priority is one but this time we'll leave it blank since we intend to assign risk factors, which we'll jot down.

Lastly, her WIC Category is Pregnant, and her baby is due on 7/13/24.

VOC Woman 4

Remember, her WIC Category defaults based on her most recent MN WIC record, which displays in Demographics and on the Search page.

<screen description – no audio> Slide transitions to Search page with Breastfeeding indicated for Polly then transitions back to VOC modal.

VOC Woman 5

If the WIC Category is Breastfeeding or Non-Breastfeeding, the question "Was this participant active in your WIC program during her most recent pregnancy?" is enabled.

We saw this before when starting Certification Mode and it works exactly the same.

If we click Yes, the system will check whether a pregnancy record exists that has an Expected Delivery Date within the last 58 weeks for breastfeeding and 32 weeks for non-breastfeeding.

If a record exists, a link between that pregnancy record and this new postpartum VOC record will be created.

Polly, though, is Pregnant and we need to select the correct WIC Category.

Go ahead and do that.

<no audio> Select Pregnant from the WIC Category dropdown.

VOC Woman 6

<no audio> Select Pregnant from the WIC Category dropdown.

VOC Woman 7

Go ahead and complete Polly's VOC.

Enter her Cert End Date of 8/31/24 and her Expected Delivery Date of 7/13/24.

Leave her Priority blank and click OK.

<no audio> Complete Polly's VOC: Cert End Date 8/31/24; Expected Delivery Date 7/13/24; leave Priority blank and click OK.

VOC Woman 8-11

<no audio> Complete Polly's VOC: Cert End Date 8/31/24; Expected Delivery Date 7/13/24; leave Priority blank and click OK.

Conclusion

We will continue completing information in the Participant Folder as part of the VOC in the next module.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

Although the Initial Contact isn't required by the MN WIC Program for VOCs, the system does require us to create an Initial Contact record when VOC certifying existing participants.

Answer #1

The answer is False.

Initial Contacts are **not** required as part of the VOC for existing participants.

The system only requires it for new applicants who are being VOC certified because it is a required part of the Prescreening process.

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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