Certification 1B - WINNIE Online Training Module

SEPTEMBER 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It provides a continued overview of certification in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being September 5, 2023.

<Transition Slide>

<screen description – no audio> Slide transitions to Sallie Mander's Cert Mode – Demographics.

Cert Mode 1

We're continuing our review of Certification Mode for Sallie Mander.

Cert Mode 1A

Like the Participant Folder, Certification Mode always opens to Demographics.

The banner at the top displays Certification Mode and a red Close button on each page while in Certification Mode.

On the sidebar, the Participant Folder section has been collapsed and is locked, and it cannot be expanded while certifying.

Cert Mode 2

The Certification/MCA section lists all of the different pages associated with a certification.

The pages that must be completed while in Certification Mode, based on MN WIC requirements, have a red tab to the left of the checkbox.

The pages are listed in the general order they should be completed since some are dependent on other information being completed first.

Let's collapse the Clinic Actions to view the rest of our Certification/MCA section.

Cert Mode 3

At the bottom, we also have the option to Issue Benefits and Complete the Certification.

Since Issue Benefits is part of the certification, the Issue Benefits under Benefit Management is disabled while in Certification Mode or during a cert attempt.

Cert Mode 3A

Both of these options trigger the system to complete the certification.

If we click either of these prior to completing the required pages…go ahead and click the Complete Certification link…

<Waiting>

<screen description – no audio> Spin icon displays.

Review Errors 1

…the Review Certification for Errors modal opens, which lists all the required information that has not yet been completed (which in this case is all of them).

Go ahead and click the Close button.

Close Cert Mode 1

We can close the Certification Mode at any time during the cert by clicking the red Close button in the banner.

Keep in mind that a hard-and-fast rule with participant records in WINNIE is that only one staff person should be in a participant's folder at a time.

This ensures there is no accidental over-writing of records due to information not being synced.

So, the Close button allows more than one staff person to contribute to a certification.

Go ahead and click the Close button.

Close Cert Mode 2

When the Certification Mode is closed, pages that contribute to certification assessment are "locked", meaning all of its fields are disabled, as we can see with Demographics.

Functions that contribute to the cert are also locked, such as Proofs and Race Ethnicity.

Go ahead and click the Participant Menu and select Proofs.

Close Cert Mode 3

<no audio> Click the Participant Menu and select Proofs.

Close Cert Mode 4

Locked and disabled.

Click Cancel.

Close Cert Mode 5

Those pages or functions completely independent of cert assessment remain available, such as Document Imaging, Manage Alerts, eWIC Account and Notes, and Peer Contacts.

Go ahead and collapse the Clinic Actions again.

<no audio> Click to collapse.

Close Cert Mode 6

When we close the Certification Mode, our options change to Resume Certification or Remove Incomplete Certification.

If we want to start the cert again, we select Resume.

Go ahead and select it from the sidebar.

<no audio> Select Resume Certification.

<Waiting>

<screen description – no audio> Spin icon displays.

Close Cert Mode 7

When we resume the Certification Mode, our first checkbox has changed from Begin Certification to Resume Certification.

Close Cert Mode 7A

Otherwise, everything is exactly as we left it, and anything completed prior to closing is retained.

We should also note that navigating away from the certification by clicking any other pages on the sidebar, the Toggle Applications icon, or selecting other options from the Participant Menu, will also effectively close the Certification Mode.

Best practice, though, is to always click the Close button prior to navigating away from the cert.

Cert Mode 4

There are a few other things we should mention about the Participant Menu while in Cert Mode or if a cert is in progress.

Click the Participant Menu.

Add Member 1

First, the Add Member link is disabled.

If we hover over Add Member a tooltip displays indicating why.

Go ahead and hover then click the button to continue.

Add Member 2

If a new member needs to be added, such as when certifying a postpartum woman and her infant, in general, the infant should be prescreened before starting mom's cert.

However, a new member can also be added from another household member's folder, if there is one, or of course, added once the cert is completed.

Change Household ID 1

Change Household ID is also disabled while in Cert Mode or when a cert is in progress and displays the same tooltip.

Go ahead and hover to view it then click the button to continue.

<no audio> Hover over Change Household ID then click the button to continue.

Manage Alerts 1

We can create and manage alerts without closing Certification Mode.

Go ahead and select Manage Alerts.

Manage Alerts 2

We can also create and manage notes.

Go ahead and select Manage Notes from the Participant Menu.

Manage Notes 1

<no audio> Select Manage Notes from the Participant Menu.

\<Waiting\>

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

Manage Notes 2

Since SOAP Notes is one of the certification pages, the SOAP Note template opens by default when Manage Notes is selected while in Cert Mode.

However, we can write any type of note by clicking the Cancel button on the template.

Go ahead and do that.

\<no audio\> Click the Cancel button.

Manage Notes 3

\<screen description – no audio\> Red box highlights General Note, Add SOAP Note and Add BF Note options.

Although we used the Participant Menu to open the Notes page, we could have gotten the same result by clicking the SOAP Notes link under Cert/MCA, so we do not have to access notes using the Participant Menu.

\<screen description – no audio\> Slide transitions back to Sallie Mander's Demographics page in Cert Mode.

Household Members 1

Go ahead and open the Participant Menu again.

Household Members 1A

We can still switch to another household member's folder while in Cert Mode.

Go ahead and select Geri from the participant menu.

\<Waiting\>

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

Household Member 2

Selecting another household member closes the Certification Mode and opens the participant folder for the other member (even if both members have a cert in progress).

If both are being certified, we will need to resume the certification each time we switch between the household members.

Let's return to Sallie's folder and resume her certification.

Follow any cues provided. Click anywhere for hints.

<audio – hint> Click the Participant Menu.

Participant Menu 2

<no audio> Return to Sallie's folder and resume her certification. Follow any cues provided. Click anywhere for a hint.

<audio – hint> Select Mander, Sallie from the Other Household Members list.

<Waiting>

<screen description – no audio> Spin icon displays.

Collapse 1

<no audio> Return to Sallie's folder and resume her certification. Follow any cues provided. Click anywhere for a hint.

<no audio> Collapse the Clinic Actions section of the sidebar.

Resume 1

<no audio> Return to Sallie's folder and resume her certification. Follow any cues provided. Click anywhere for a hint.

<no audio> Select Resume Certification from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

End Slide 1

We'll continue our review of Certification in the next training module.

<Transition Slide>

<screen description – no audio>

Test Your Knowledge

Multiple Choice Q#1

Which statement is true?

A. We can start a cert at any time for all existing participants.

B. Once we start a cert, we must complete it.

C. Navigating to anywhere else in WINNIE, including other household members' being certified on the same date, always closes Certification Mode.

D. We should terminate certifications in order to sync household members' appointments.

E. If we are certifying a postpartum woman and infant, we should start mom's cert then select Add Member from the Participant Menu to prescreen the infant.

Answer #1

The answer is C.

Certification Mode will always close if we click anywhere other than the options listed within the Certification/MCA section of the sidebar.

Explanations for Other Answers:

A. For women, a cert can be started at any time, but for infants and children, they can only be started within 30 and 45 days of their Cert End Date, respectively.

B. We can close the Certification Mode at any point while certifying.

D. We should never terminate certifications to sync household members' appointments. That is a "nice to have", not a requirement.

E. The Add Member option in the Participant Menu is disabled while in Certification Mode or during a cert attempt. If certifying a mom and baby, best practice would be to prescreen the infant prior to beginning mom's certification.

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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