

Document Imaging 1 – WINNIE Online Training Module

APRIL 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It provides an overview of scanning documents and uploading files in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being April 21, 2023.

Document Imaging

Overview

Document imaging in WINNIE includes both scanning paper, or hardcopies, and importing electronic documents.

It can be used to insert a record into the participant folder that must be maintained for a member or entire household. For example, medical formula or food approval, release of information, signed waivers, etc.

Guidelines

Whether scanning or importing documents, there are a couple of guidelines to follow.

The document should be added to the participant or household's record as soon as possible.

It should not sit in a stack to be scanned at some time in the future nor stored in a folder to be imported with a bunch of other documents.

This ensures the information is readily available, the folder contains all the appropriate and pertinent documentation, and is complete if the participant or household requires further assistance in any capacity or is transferred to another agency.

Policy

Documents should NEVER be scanned or imported if they are submitted as proof of income, ID or residency.

All that is required is verification by an appropriate staff member and documentation in WINNIE.

It should never be used to document information we already document in the system in other ways.

Reference: MOM, Section 1.14 Record Retention.

Data Privacy

A reminder that any hardcopy or electronic document with private data must be destroyed or deleted from our browser and/or computer once inserted into the Participant Folder.

Reference: MOM, Section 1.7 Data Privacy

Scanners

Each agency has been provided at least one scanner by the State.

Information about installing and using the scanner can be found on the MDH WIC Technical How-To's webpage.

Only the WINNIE user physically attached to the scanner can scan hardcopies.

SWIPE must be "on" when scanning.

Any WINNIE user, though, can import electronic documents and this process does not require SWIPE.

Scan

<Transition Slide>

<screen description – no audio> Slide transitions from topic slide to Demographics page of Faye King's folder.

Scenario

Here's where we're at. We certified Faye King and her infant and child today.

We had her sign the Multipurpose Affidavit for Proof of ID, she had their MA number and a piece of mail, so was able to provide the other necessary proofs, and now we need to scan it into the household's folders.

We also have a Medical Formula approval for Faye's infant, but we'll get to that in a little bit.

SWIPe

SWIPe is on.

If it wasn't, the Error message displays that reads " The TWAIN service is not responding. Verify that the TWAIN service is connected, running, and unblocked within your local environment."

TWAIN is a protocol that allows a scanner to acquire the image and then save it directly into the software and we'll see the word TWAIN again in a minute.

But our SWIPe is on, and our scanner is connected to our computer, and we are ready to scan.

<screen description – no audio> Slide transitions to SWIPe modal and back to Demographics.

Link

Click the Document Imaging link on the sidebar.

Scan Button

The Scan button is enabled regardless of whether SWIPe is on, or we are connected to our scanner.

Click the Scan button.

Scanner Dropdown 1

Once a scanner has been selected, it will default populate.

Notice that TWAIN word again.

The first time we scan...

<no audio> Click the Scanner dropdown.

Scanner Dropdown 2

...there may be more than one scanner listed in the dropdown and we always want to select the Canon P-215II (**TWO**) TWAIN option.

Re-select the Canon P-215II (**TWO**) to close the dropdown.

Document Source

The Document Source is based on our scanner, is disabled, and displays the appropriate option.

The Scan Quality, click the dropdown...

<no audio> Click the Scan Quality dropdown.

Scan Quality

...has 3 options: Good, Better, and Best.

Every file we scan or import increases the size of our database and choosing a different quality increases the size of the document, taking up more space.

As a general rule, good is good enough.

Re-select Good to close the dropdown.

Scan in Color

The Scan in Color toggle allows just that.

Scanning in color also increases the size of the document and the size of our database, and it's really just a nice to have while not being necessary at all.

So, in general, we'll just keep it toggled off when scanning.

We've ensured the scanner is on inserted our waiver writing side down and title first into the scanner.

Click the Scan button.

Scanning

If there are issues when scanning, such as the paper not feeding correctly or SWIPE not being on, the system will display this message indicating "The scanning device may have opened additional windows in the background. Check for any messages needing attention."

If we see this, we should minimize the WINNIE browser tab, review the message displaying behind it, and resolve the issue it's indicating.

Scanned Doc

Once the document has successfully scanned, a thumbnail image of it displays.

Scanned files are PDFs.

The first icon, Contents, displays thumbnails of each page and may be helpful if there are multiple pages.

Click the first set of horizontal ellipses.

Tools

This is the Tools list.

Click the icon again to close the list.

Hover Icons

Hover over the next two icons then click the second set of ellipses.

<screen description> Hover over minus sign icon and tool tip displays that reads “Zoom Out (Ctrl + Minus key). Hover over plus sign icon and tool tip displays that reads “Zoom In (Ctrl + Plus key).

<Transition Slide>

If we put the document into the scanner with the bottom edge first, instead of the title edge...

<screen description – no audio> Slide transitions to upside-down image.

Rotate

...we can rotate it to display upright using the Rotate option in the View Options menu.

<screen description – no audio> Upside-down document rotates 90 degrees clock-wise, then 90- degrees to upright.

<Transition Slide>

<screen description – no audio> Slide transitions back to original scan image with the View Options menu open.

Fit to Width

We can also automatically increase the size to 100% by selecting Fit to Width.

<no audio> Select Fit to Width.

Find Icon

The Find icon isn't usable because it can't search for text on an image, which this currently is.

Hover over the last set of ellipses then click the button.

Settings

Just note that we can print from here.

The Save option saves to our computer, which we would never do.

Document Type

Once we've scanned a document, the document Details section displays with two additional fields.

Both fields are required before we can save the doc to the participant record.

Click the Document Type dropdown.

Document Type 1

The Document Type is the **subject** of the scanned document.

Since this was part of the Certification, let's select Cert Info/Nutrition Education.

Description 1

The Description field is a free-form text field with no character limit that accepts letters, numbers, spaces, and special characters, where we can explain what we are documenting.

There isn't really a standard, beyond common sense, for how to complete this field.

We just want to make it as clear and concise as possible.

Go ahead and click into the Description field...

Description 2

This is a Signed Waiver for Proof of Identity.

Let's type Signed Waiver<hyphen>ID.

<audio – hint> Make sure to type exactly: Signed Waiver-ID

Buttons

At any point, we can choose to Rescan our document before we Save it.

Once we've completed our required fields, we click Save.

<no audio> Click the Save button.

Waiting

<screen description – no audio> Spin icon displays with message "Working...please wait."

Scan Complete

The date and time, Document Type we selected and the Description we entered all display.

<Transition Slide>

<screen description – no audio> Slides transitions from Document Imaging page to topic slide.

Upload File

<Transition Slide>

<screen description – no audio> Slides transitions from topic slide back to Document Imaging page.

Upload Button 1

In WINNIE, we can also upload a file, or import it, from our computer into a participant's or household's records.

This process does not require SWIPE to be "on".

Uploaded File Types

Uploaded files are not converted to PDF and are imported as their original file type, such as PDF, Word, Excel, or images.

Upload Button 2

As we mentioned earlier, we also have a Medical Formula Approval for Finnick King, Faye's infant.

It was sent to us via a secure email.

We saved it to our Downloads folder, as best practice, so that we can delete all private data at the same time at the end of our workday.

Since we are in Faye's folder, we are just going to upload it to her folder.

Go ahead and click the Upload File button.

Upload File Modal

All three fields are required in the Upload File modal.

First, we have to select our file. Click the Choose File button.

Downloads Folder

Our browsing modal opened directly to our Downloads folder.

But, if it didn't, Downloads can be easily found on the sidebar.

We can either click to highlight our file and click Open or double-click the file.

Let's double-click it.

Document Type 2

Next, click the Document Type dropdown.

Document Type 3

This is the same list we saw when we scanned the Waiver.

This time, our document is an approval for Medical Formula. Select that option.

<audio – hint> Select Medical Documentation: Formula.

Description 3

All the same applies to this Description field: free-form text, no character limit, and allows all characters.

For this type of documentation, our agency might decide on a format.

We are going to type the name of the formula, Enfacare, and the approval end date, 7/18/23.

Click into the Description field.

Description 4

Type: Enfacare 7/18/23

<audio – hint> Make sure to type exactly: Enfacare 7/18/23.

Save Upload

Click the Save button.

Waiting

<screen description – no audio> Spin icon displays with message “Working...please wait.”

Upload Complete

The date and time, Document Type we selected, and the Description we entered all display.

In the next module, we will review how to move this document to the correct household member’s folder.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

Scanned documents are all PDFs while uploaded files maintain their original file type.

Answer #1

The answer is True.

Scanned documents are all PDFs while uploaded files maintain their original file type.

Multiple Choice Q#2 (single answer)

Multiple Choice – select the correct answer.

We must always keep a scanned or uploaded record of...

- A. Anything submitted electronically by an applicant or participant for appointments.
- B. Documents with signatures, such as Waivers, Release of Information, Medical Formula/Food Approvals, etc.
- C. Any documents, images, etc. providing proof of Identity, Residency, or Income submitted electronically.
- D. Documents providing referral (anthropometric) information from a medical provider.
- E. Anything we document as proof in the system as validation of that proof.

Answer #2

The answer is B.

Only documents with signatures, such as Waivers, Release of Information, formula and food approvals, etc. should be scanned or uploaded into WINNIE.

Otherwise, visual review by an appropriate WIC staff person and documentation in the system is all that is required for referral and “proof” information. We should never scan documents or upload files for anything that we already document in the system.

T/F Q#3

True or False?

We should always scan documents using the best quality.

Answer #3

The answer is False.

When scanning documents, in general, good is good enough. Increasing the quality or color increases the size of the document and the size of our database without really making much of a difference.

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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