Document Imaging 2 – 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 different document imaging functions 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 Functions

<Transition Slide>

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

View Document 1

If we need to view a scanned or uploaded document, we must first select it, then click the View Document button.

Go ahead and view the Signed Waiver.

<no audio> Click the Signed Waiver-ID row.

View Document 2

<no audio> Click the View Document button.

Waiting

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

<Transition Slide>

<screen description – no audio> Page slides down to display browser tab.

Downloads 1

To view a document, we must first download it.

Depending on our browser, either the Microsoft Edge Downloads message or the Google Chrome Downloads bar displays.

We should be familiar with downloading files, and the requirements for deleting them from our browser and computer, after reviewing the Documents training modules.

For this module, we are using Microsoft Edge, but the concepts are the same if we use Google Chrome.

Click the file to open it.

<no audio> Click the file button.

Downloads 2

The downloaded document displays in another browser tab in our default browser.

If we hover over the tab…

<no audio> Hover over the browser tab.

…we can see that this isn't a temporary file.

Click the Continue button.

Downloads 3

We can also see it's pulling it from our Downloads folder, and we know that as a downloaded file, it will need to be deleted from our browser and computer by the end of our workday.

We also know that this document must be scanned into the record for all applicable household members.

So far, we've only scanned it into Faye's folder, but we also certified her infant, Finnick and child, Caye so we still need to insert it into their folders as well.

Let's close this tab.

<no audio> Click the x in the browser tab.

<Transition Slide>

<screen description – no audio> Page slides up to hide browser tab.

\<Transition Slide\>

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

Copy Documents

\<Transition Slide\>

\<screen description – no audio\> Slide transitions from Topic slide to Document Imaging page in Faye King's folder.

Copy 1

We also have the Medical Formula approval that belongs in Finnick's folder.

We are going to take care of moving both of these documents to the appropriate folders by using Copy Document.

Copy Documents is used to move documents within **a household**.

As we'll see a bit later, Reassign is for moving documents to **another household.**

The Waiver is still selected, so let's click the Copy Document button.

Waiting

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

Copy 2

All members that currently belong to the household, and haven't been purged, display in the Copy Document list.

We can select all of them at one time by toggling on Copy.

 Go ahead and do that.

\<no audio\> Toggle on Copy.

Copy 3

And we can individually add or remove them by toggling each row.

Let's remove May since she wasn't certified today. Go ahead.

\<audio – hint\> Toggle off Copy in the KING, MAY row.

Save Copy 1

Click Save.

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

Copy 4

We also want to copy the Medical Formula approval to Finnick's folder.

Go ahead and do that. Click anywhere for a hint.

<audio – hint> Click the Medical Documentation: Formula row to select it.

Copy 5

<audio – hint> Click the Copy Document button.

Waiting

<screen description – no audio> Spin icon displays.

Copy 6

<audio – hint> Toggle on Copy in King, Finnick's row.

Save Copy 2

<audio – hint> Click the Save button.

Delete 1

Since the Medical Formula approval doesn't belong in Faye's record, let's delete it.

Since the row is already selected, we simply click the Delete button.

Delete 2

We are sure. Click Yes.

<no audio> Click the Yes button.

Waiting

<screen description – no audio> Little spin icon displays.

Verify 1

Let's verify everything worked as it should.

Open Caye's folder.

<audio – hint> Click the participant information in the top right corner of the page.

Verify 2

<audio – hint> Select King, Caye in the Other Household Members section of the Participant Menu.

Verify 3

Yep. Signed Waiver in Caye's folder.

Next, let's verify Finnick has the correct documents. Go ahead.

<audio – hint> Click the participant information in the top right corner of the page.

Verify 4

<audio – hint> Select King, Finnick in the Other Household Members section of the Participant Menu.

Verify 5

As expected, both the Waiver and the Formula Approval are in Finnick's folder.

<Transition Slide>

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

Reassign

<Transition Slide>

<screen description – no audio> Slide transitions from Topic slide to Document Imaging page in Finnick King's folder.

Reassign Button

As we mentioned earlier, the Reassign button can be used to move a document to another household.

For instance, we were scanning another document and accidentally scanned it into Finnick's folder instead of the correct household's folder.

We could delete it, but we're tired of scanning and it's easier to reassign it!

Let's select the Release of Information file and click Reassign.

<no audio> Select the Release of Information row.

WIC Staff: Shoot! That was NOT the right folder.

WIC Staff: Hmmm. Could delete it…more scanning…or could reassign it!

Reassign 1

<no audio> Click the Reassign button.

Validation

If we were to enter a State WIC ID from the same Household, such as Caye's State WIC ID, a validation message immediately displays that reads: You cannot reassign this document to the same Household ID as the current record.

Reassign 2

Records can be reassigned regardless of the agency or clinic the participant or household currently belongs to.

We can either reassign the file to a specific member of another household or **all members** of another household**,** including any existing members that aren't currently active and are in Agency 88.

We are going to enter the Free family's household ID because we meant to scan the Release of Information into their records.

Click the Household ID radio button.

WIC Staff: OK This ROI belongs in the Free family's folders.

No Zeroes

We don't have to type preceding zeroes when entering IDs in either of these fields.

Reassign 3

Let's type the Household ID: 1000038.

<audio – hint> Double-check that the Household ID is correct: 1000038.

Save Reassign

Click the Save button.

Waiting

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

Deleted File

The file is automatically deleted from the original **household**…

<Transition Slide>

<screen description – no audio> Page transitions to Arya Free's Demographics page.

Other HH 1

…and if we open Document Imaging in the participant folder one of the Free Household's members… go ahead…

<audio – hint> Click Document Imaging under Participant Folder on the sidebar.

Other HH 2

We can see it's been added to Arya's folder.

Let's check the other member's folder…go ahead…

<audio – hint> Click the participant information in the top right corner of the page.

Other HH 3

<audio – hint> Select Free, Bea under Other household Members.

Other HH4

We can see the Release of Information has also been added to Bea's folder.

Click the button to continue.

Test Your Knowledge

Multiple Choice Q#1 (single answer)

Multiple Choice – select the correct answer.

When we view documents in Document Imaging…

A. They will always automatically open in a default browser tab.

B. Only the scanned documents (PDFs) are downloaded.

C. They are downloaded to both our computer and our browser and must be deleted by the end of each workday.

D. They are all downloaded to our computer, but not our browser, and must be deleted from our computer by the end of each workday.

E. They are temporary files and don't have to be deleted by the end of each workday.

Answer #1

The answer is C.

All files when viewed in WINNIE, regardless of file type, are downloaded to both our computer and browser. Once downloaded, they must be deleted from both our browser and our computer by the end of each workday.

Multiple Choice Q#2

Which statement is correct? (single answer)

A. When we copy documents, the system automatically deletes them from the original folder.

B. If we select Household ID when reassigning, they will only be added to folders of household members who are currently active.

C. We can reassign to other members of the same household.

D. When we copy document, it automatically saves to all other members of that household.

E. None of these are true.

Answer #2

The answer is E.

None of those statements are true.

When we copy documents, we can select which members of the same household we want to copy it to (D) and should delete them from the original folder if we don't want them in that folder (A).

When we reassign, they can only be reassigned to members of a **different** household (C) and if we select Household ID, the document will be added to the folder of all other household members, active or inactive (including those members in Agency 88) (B).

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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