

Potential Duplicate Participants – WINNIE Online Training Module

OCTOBER 2024

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It provides an overview of Potential Duplicate Participants in WINNIE, the MN WIC Information System.

Date 1

All dates in this module are based on today's date being October 30, 2024.

<Transition Slide>

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

Overview

Overview 1

In this module, we'll review how to identify when more than one record exists for a single participant and how to designate one of those records as a duplicate.

We use the Potential Duplicate Participants function to do this...

Overview 2

...This option is listed under Clinic Actions for staff with WINNIE Agency Admin (role 10).

Click the button to continue.

Overview 3

Select Potential Duplicate Participants from the sidebar.

Overview 4

Most duplicate participant records are created accidentally.

But, upon occasion, we may have intentional duplicate participation.

To minimize this risk, we should monitor our agency's potential duplicates at least weekly or bi-weekly.

If we do find evidence of duplicate participation in which the two records have overlapping certification and benefit issuance, we should gather as much information as possible to determine what has occurred, involve other agencies if the duplicate belongs somewhere else, and contact your WIC Consultant and State WIC Program Integrity Specialist for assistance.

Overview 5

There are two different methods for identifying duplicates: by State WIC ID and using the automated State-Defined Comparison.

Overview 6 - Agency

There isn't an agency in the header on this page and the agency in the dropdown is only relevant when using the State Defined Comparison.

State WIC ID

SWID 1

We use the State WIC ID method, which is toggled on by default, when a participant record is known to be a duplicate.

Since we don't want the incorrect participant record to be used, best practice is to resolve it as a duplicate as soon as possible.

Let's take a look at the State WIC ID search first.

<Transition Slide>

<screen description – no audio> Slide transitions back to Search page with Stone, Gray and Stone, Graye listed.

Here's our scenario.

SWID 2

One of our co-workers who doesn't have admin rights accidentally created a duplicate record for Graye Stone whom she prescreened as pregnant.

She asked if she should put DO NOT USE or something behind the name.

In general, we don't want to do this.

POTENTIAL DUPLICATE PARTICIPANTS

It's easy enough just to take note of the records and resolve the appropriate one as a duplicate as soon as possible.

Co-worker: Hey! So sorry but I accidentally created a duplicate when I prescreened Graye Stone. Can you correct that for me?

Admin Staff: No worries! It happens. Thanks for letting me know. I'll get it taken care of.

Co-worker: Should I put DO NOT USE or DUPLICATE in the name?

Admin Staff: No. We don't want to do that. Just let me know ASAP so that I can mark it as a duplicate right away.

SWID 3

We're going to jot down the two State WIC IDs and indicate which one we want to keep.

And return to Potential Duplicate Participants. Go ahead.

<no audio> Select Potential Duplicate Participants from the sidebar.

SWID 1: 1426021 and SWID 2: 916702 (keep)

SWID 4

We enter the two State WIC IDs for comparison.

Click into the State WIC ID field.

SWID 5

We can type the State WIC IDs without the preceding zeroes.

Type our first ID: 1426021.

<no audio> Type: 1426021

SWID 6

Hot key shortcut is to press the Enter key. Do that.

SWID 7

The ID is listed beneath the field, and we can enter our second ID right away.

Go ahead and type 916702.

<no audio> Type: 916702

SWID 8

Obviously, we can also click the Add button.

Do that this time.

SWID 9

Notice when we click add, we have to click inside the field again.

Things that make you go hmmm.

We can actually add more than two IDs if we need to.

We can click the X to remove the ID.

To compare the IDs, we click the Search button.

Go ahead and do that.

<no audio> Click the Search button.

<Waiting>

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

State WIC ID Results Grid

SWID Results 1

The Results grid lists the smallest ID number for Participant 1, so not in the order we entered the IDs.

The first column is how much of the participants' information is the same followed by each participants ID and name.

We need to compare the records and as with all grids in WINNIE, we must first select the row before clicking the button.

Go ahead and do that.

Click the row in the Results grid then click the Compare button.

SWID Results 2

<no audio> Click the row in the Results grid then click the Compare button.

Compare Modal

SWID Compare 1

The Compare Potential Duplicate Participants modal opens.

The two IDs display again at the top of the grid with 4 columns: what is being compared, the first participant's info, the second participant's info, and whether it is the same.

The Yes rows, meaning the data matches, are highlighted in yellow.

Go ahead and click below the scrollbar to see the information being compared.

SWID Compare 2

We can export this grid to Excel and we'll take a look at that later.

Until we make changes, the User and Date display based on End-of-Day processing, which we'll talk about in a couple of minutes.

We resolve duplicate records by toggling on "Keep" for the participant record we want to continue using.

Rule of thumb: Always keep the participant record with the most recent cert or benefit records.

SWID Compare 2A

In instances like this where we know they are duplicates, it's easy.

Our coworker told us she had just created this duplicate, and we marked the one to keep.

Toggle on "Keep" for Participant 1 then save our resolution.

<no audio> Toggle on Keep for Participant 1 then click the Save button.

SWID Compare 3

<no audio> Toggle on Keep for Participant 1 then click the Save button.

SWID Compare 4

This message doesn't only confirm that we're keeping the appropriate State WIC ID, but also let's us know that the other record will be system-terminated as a duplicate.

Click the Yes button.

<Waiting>

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

After Resolving Duplicates

SWID After 1

Let's take another look at the two participant records on the Search page.

<no audio> Select Search from the sidebar.

SWID After 2

The participant we did not keep now displays Duplicate Participant in their card on the Search page.

Although she used to belong to the Eastside clinic, WINNIE has assigned her to Agency 88.

If we toggle on Show Details...go ahead...

SWID After 3

...we can see that the system has terminated the duplicate record.

If we try to open the duplicate participant's folder...go ahead and double-click to open it...

SWID After 4

...a message displays with the ID of the participant record that we kept.

When we click the OK button...

SWID After 5

...the folder does not open.

Go ahead and open, by double-clicking, the folder we kept.

<no audio> Double-click STONE, GRAYE's participant card to open her folder.

<Waiting>

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

<Transition Slide>

<screen description – no audio> Slide transitions from transfer confirmation message to Demographics page.

We're just going to complete the transfer and open Demographics behind the scenes.

View Duplicate Participant Record

View Duplicate 1

As we learned in the Demographics module, we can see the record for the duplicate in the folder of the participant we kept.

Click below the scrollbar.

View Duplicate 2

The grid has the duplicate's SWID, name, who assigned the duplicate status, and when.

Click the View button.

View Duplicate 3

All fields are disabled but all pages are viewable in Duplicate Participant Mode.

Click the Close button.

View Duplicate 4

Let's go back to the Potential Duplicate Participants page.

<no audio> Select Potential Duplicate Participants from the sidebar.

State WIC ID Search (Again)

State WIC ID Search 1

Enter the same IDs without preceding zeroes in the same order as before, using the Enter key instead of the Add button, then open the Compare modal.

<audio – hint> Click into the State WIC ID field.

State WIC ID Search 2

<no audio> Enter the same IDs without preceding zeroes in the same order as before, using the Enter key instead of the Add button, then open the Compare modal.

<Waiting>

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

State WIC ID Search 3

<no audio> Enter the same IDs without preceding zeroes in the same order as before, using the Enter key instead of the Add button, then open the Compare modal.

<audio – hint> Select the row first.

State WIC ID Search 4

<no audio> Enter the same IDs without preceding zeroes in the same order as before, using the Enter key instead of the Add button, then open the Compare modal.

Toggle Off Keep

Toggle Off Keep 1

The last resolution we made is maintained if we open the Compare modal again for the same two IDs.

The User and Date now show who resolved the duplicates and when.

If we toggle off Keep for Participant 1...go ahead...

Toggle Off Keep 2

...WINNIE automatically toggles on Keep for Participant 2.

Since we've told the system these are duplicate records, it'll toggle back and forth between the two State WIC IDs.

Go ahead and toggle off Keep for Participant 2.

Undo Duplicate Resolution

Undo 1

Once we've designated a participant record as a duplicate, an Undo button displays, which is what we must use if we want to toggle off both Keeps and remove the duplicate resolution.

Go ahead and click the button.

Undo 2

A confirmation message displays.

If we were to click Yes to undo the resolution...

Undo 3

<screen description – no audio> Slide transitions back to Compare modal.

...both keeps are toggled off...

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

...the Duplicate Participant designation is removed, and we can now open that folder and transfer it back from Agency 88...

Undo 4

...and the Duplicate Participant grid no longer displays in the folder.

<screen description – no audio> Slide transitions back to the undo confirmation message.

Undo 5

But we're going to keep our duplicate resolution and click No.

<no audio> Click the No button.

Undo 6

Click the Cancel button to close this modal.

State Defined Comparison Criteria

State Defined 1

Our other option is the State Defined Comparison.

Toggle this on.

<no audio> Toggle on State Defined Comparison.

Criteria 1

For this option, records are added to a DUPLICATEPARTICIPANTS table in the database during End-of-Day processing, if they meet the State-specified criteria, which we can see by clicking the View Duplicate Participant Criteria button.

Go ahead and do that.

Criteria 2

The Duplicate Participant Criteria modal opens.

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This is a view-only grid that tells us what fields are compared, which ones show in the Compare modal and their row order, if it is compared, how much of it is compared, how much it can differ by, if we change the data at all before comparing, and whether it is an exact match or if it's a sounds like match.

Criteria 3

Of note is that there are only a couple of fields that are actually compared during End-of-Day processing.

Potential duplicate records must have the same date of birth, the same first three letters of the first and last name, as well as...click below the scroll bar...

Criteria 3

...the same gender.

Click the Close button.

Show Top

Show Top 1

The Show Top field defaults to 100.

This is the maximum number of duplicate records it will display from the End-of-Day processing whereby one of the participants belongs to our agency, which is default populated in this section.

As mentioned before, best practice is for agencies to continuously monitor duplicate participants, at least weekly or bi-weekly, so we can just leave this number at 100, ensuring without a doubt that all potential duplicates for our agency will display.

Agency Dropdown

Agency 1

The agency we are currently working in shows in the Agency dropdown, but this remains read-only.

It can only be changed by returning to the Search page and selecting another agency (assuming we work at multiple agencies).

We simply click Search to generate the list of potential duplicates where at least one of the participants belongs to our agency.

Click the Search button.

<Waiting>

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

State Defined Results Grid

State Grid 1

The rows in the grid are ordered by most alike to least, and the first 5 columns are the same as the State WIC ID search results.

However, it has additional columns that display the information based on our state-defined criteria, including same birth date, first three letters of the first and last name, and gender.

Export to Excel

Excel Export 1

We mentioned before we can export this to Excel.

This time let's take a look.

Go ahead and click the button.

<no audio> Click the Excel Export button.

Excel Export 2

And click the download button.

<no audio> Click the Potential Duplicate Participants download button.

Excel Export 3

Click the button to continue.

State Defined Compare

State Compare 1

Go ahead and compare the participants in the first row.

State Compare 2

<no audio> Compare the participants in the first row.

State Compare 3

The same exact modal opens.

Since we don't know if these are duplicates for certain, we should carefully review all of the criteria to see what matches and what doesn't.

Click below the scroll bar.

State Compare 4

In this instance, only one of these participants belongs to our agency.

If we were to run this for agency 241, these same participant records would display.

Only one agency has to resolve the duplicate records.

Once resolved, these potential duplicate participants will no longer display for either agency.

State Compare 5

Notice the blank fields equal Yes as well, so we always need to actually look at the information.

If we were to determine these participants are the same person, we would want to follow our rule of thumb and keep the participant record with the most recent certification or benefit issuance.

And we would do this in the exact same way, toggle on "Keep" for that participant.

Not Duplicates

Not Duplicates 1

In this instance though, it's pretty clear these records are not the same person, and we can toggle on Participants Not Duplicates to indicate this.

Go ahead and do that.

<no audio> Toggle on Participants Not duplicates.

Not Duplicates 2

And save the change.

<no audio> Click the Save button.

Not Duplicates 3

The confirm message asks if we are sure the participants aren't duplicates.

We are. Click Yes.

POTENTIAL DUPLICATE PARTICIPANTS

<no audio> Click the Yes button.

<Waiting>

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

Not Duplicates 4

Our two non-duplicate participants (Merry Thoe and Merrie Thonne) are then removed from the Results list.

If we were to realize this was a mistake, we can always enter their State WIC IDs...

Not Duplicates 5

...and compare them.

Not Duplicates 6

The Participants Not Duplicates toggle is disabled but once again, the Undo button displays, which allows us to change them back to potential duplicates by removing the resolution.

End Slide 1

This concludes our review of Potential Duplicate Participants.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

When using State WIC IDs to identify duplicates, at least one of the participants must currently belong to the agency in the Agency dropdown for the participants to show in the Results grid.

Answer #1

The answer is False.

The participants can belong to any agency when identifying duplicates using State WIC IDs.

T/F Q#2

True or False?

POTENTIAL DUPLICATE PARTICIPANTS

When using the State Defined Comparison, at least one of the participants must currently belong to the agency in the Agency dropdown for the participant to show in the Results grid.

Answer #2

The answer is True.

The State Defined Comparison is specific to the agency listed in the Agency dropdown and at least one of the potential duplicate participants must belong to that agency for the potential duplicates to display in the Results grid.

T/F Q#3

True or False?

If the two potential duplicate participants don't belong to the same agency, both agencies will have to address or resolve the participant records.

Answer #3

The answer is False.

Only one of the agencies needs to resolve the potential duplicate participants. Once resolved, they will no longer display in the State Defined Comparison results for either agency once End-of-Day is run again.

End

End Slide 2

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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