Participant Folder – WINNIE Online Training Module

MARCH 2023

Introduction

Intro

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

Open Folder

Date

All dates in this module are based on today's date being March 8, 2023.

<Transition Slide>

<screen description – no audio> Screen transitions from topic slide to Participant Search page.

Search

Once we find the participant's record, we can open their folder and provide and document WIC services.

Scenario

Here's our scenario.

Moe Ment is calling because she is having issues using the IVR, or customer service line, for her family's WIC Card.

We want to verify she is using the correct date of birth and zip code, which is information found in the folder.

Moe gave us her household ID, 2031787, which was written on the back of her WIC Card.

Search Scenario

Go ahead and search for Household ID 2031787 in our agency.

Click anywhere for a hint.

<hint – audio> Click inside the Household ID field.

HHID Search

<hint – audio> The Household ID is incorrect. Type 2031787 and press the Enter key or click the Search button.

<hint – audio> Type 2031787 and press the Enter key or click the Search button.

Quick Wait

<screen description – no audio> Number displays but no results yet.

Search Results

Our search found Ella and Linna in our agency.

To open a participant folder, we can either double-click on the participant card or click on the Open Folder icon in that card.

But what should we do first?

Click anywhere for a hint.

<screen description – no audio> What should we always do before opening a participant folder?

<hint – audio> Toggle on Show Details.

Show Details

Yep. We always want to checkout Show Details.

Click below the scroll bar.

Details 1

This is what we can glean from Ella's Details card.

She in a current cert, has an appointment in two days, and is really overdue for February benefits.

Hmmm. Depending on the appointment type and whether Moe has time, maybe we can help her with more than just the IVR today.

Let's take a look at Linna's Details card.

Go ahead. Click anywhere for a hint.

<hint – audio> Click anywhere on Linna's card to select it.

Details 2

Linna's cert ends in April because she's turning 5, same appointment, and she is also overdue for benefits.

Let's open **Ella's** participant folder using the icon on her card.

<no audio> Click the Open Folder icon on Ella's participant card.

<Waiting>

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

Transfer Msg

Right! We didn't double-check the clinic Ella and Linna belong to.

If the clinic the participant belongs to isn't the same as the clinic we are working in when we open the folder, WINNIE will ask if we want to transfer the participant to our current clinic.

Clinics are assigned based on the household's preference for location and hours.

The only reason to transfer them to another clinic, or change their clinic, is if the household's preferences change.

Otherwise, we just need to change the clinic we are **working in** to match the participant's clinic.

So, click No on this message.

Change Clinic

We already know how to change the clinic we are working in, so go ahead.

<screen description – no audio> Screen displays "Change the clinic we are working in to Ella and Linna's clinic."

Click anywhere for a hint.

<AUDIO – hint> Click the Clinic dropdown.

Select New Clinic

<AUDIO – hint> Select the same clinic that Ella and Linna currently belong to: Northwest.

Open Folder

Now that we are working in their clinic, let's **double-click** this time on Ella's card to open her folder.

\<Waiting\>

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

Alert

Whenever a folder is opened from the Search screen, if there are alerts, the Display Alerts modal shows first.

This includes both system and user alerts both of which will be reviewed in the Alerts training modules.

For now, press the Enter key or click the Close button.

\<Transition Slide\>

\<screen description – no audio\> Slide transitions from Demographics page in the Participant folder to a topic slide.

Participant Folder

\<Transition Slide\>

\<screen description – no audio\> Slide transitions from the topic slide to the Demographics page in the Participant folder.

Demographics

The Participant Folder always opens to Demographics, which has two sections: Member information that is specific to this person and household Information in the gray panel on the left, where the Household ID is listed, which is information shared by everyone in the same household.

Page Header

While in the folder, the page header stays the same no matter what page we navigate to.

The agency and clinic we are working in are read-only, or cannot be changed.

The Participant Menu, provides the Last Name, First Name, State WIC ID, and age (or weeks gestation if a pregnant woman) of the participant the folder belongs to.

Click the Participant Menu dropdown.

Participant Menu

This menu displays on **all** pages within the participant folder.

There are two sections to the Participant Menu: Actions, of which some options we will be reviewing in the next module and…

Other HH Mbrs

…the Other Household Members section, which only displays if there **are** other household members, and is where we can find the household ID when on other participant folder pages.

However, this means for households that only have one member, which is relatively rare, we can only see the Household ID on Demographics and the Manage eWIC Account page, which we will see later in this module.

Only One Folder

In WINNIE, only one folder can be opened at a time.

This ensures that no data syncing issues can occur.

When working with a household with multiple members, we can easily switch between them using the Other Household Members list.

All household members, except for children over the age of 5 who are categorically ineligible, are listed regardless of the agency or clinic they belong to.

Keeping this in mind, let's click on Moe.

Search Reminder

Remember our search results? Only Ella and Linna were found in our agency.

Transfer Msg

If a household member currently belongs to another agency or clinic, the system will initiate a transfer from within the participant folder.

We'll look at the whole transfer process in the Transfer training module, so for now, click No.

Other Mbr

We know Linna is in our agency and clinic so let's click on her info.

<Waiting>

<screen description – no audio> Spin icon displays.

Other Mbr 1

And now we are in Linna's folder.

We can move back and forth between household members' folders on every page within the participant folder.

Let's go back to Ella. Go ahead.

Click anywhere for a hint.

<hint – audio> Click the participant's information, or Participant Menu, in the top right corner of the page.

Go Back

<hint – audio> Click on Ella's information in the Other household Members section of the Participant Menu.

<Waiting>

<screen description – no audio> Spin icon displays.

<Transition Slide>

<screen description – no audio> Screen transitions from Participant Folder page to topic slide.

Folder Navigation

<Transition Slide>

<screen description – no audio> Screen transitions from topic slide to Participant Folder page.

PF Sidebar

The left sidebar has 5 sections and the options within each section are listed alphabetically.

The Participant List and Clinic Actions sections are the same as the Search page.

Close PF

To close the folder, we will most often click Search or if logging out or switching modules, we can also click the Toggle Applications icon to return to the Module Launcher.

However, clicking any of the Clinic Actions options closes the current participant folder by bringing us to a new functional page.

Let's take a tour of each option under Clinic Actions starting with Create New Household.

<no audio> Click Create New Household.

Create New HH

We know we are no longer in the participant folder because our sidebar reverted to the options we are familiar with from the Participant Search page and the participant menu no longer displays in the right corner.

Let's continue our tour, noticing the header and sidebar on each page, and setting our own pace.

One note: each of these pages is view-only.

Their functionality will be reviewed in a training module specific to each topic.

Click Documents.

<screen description – no audio> Applicant Prescreen page opens with no agency header and Participant List sidebar.

Documents

<screen description – no audio> Documents page opens with Multi-Purpose Affidavit Form listed and agency/clinic header and Participant List sidebar.

Click Lock Households.

Locked HHs

<screen description – no audio> Locked Households page opens with no agency/clinic header and Participant List sidebar.

Click Participant Transfer History

Xfer PPT Hx

<screen description – no audio> Participant Transfer History page opens with no agency/clinic header and Participant List sidebar.

Click Potential Duplicate Participants.

Pot. Dup. Ppts

<screen description – no audio> Potential Duplicate Participants page opens with no agency/clinic header and Participant List sidebar.

Click Work with On-Site Group.

Work w/On-site Grp

<screen description – no audio> Work with On-site Group page opens with agency/clinic header and Participant List sidebar.

<no audio> WAIT…

Did you notice? The Calendar option changed from Scheduler to Clinic Schedule once we exited the participant folder.

Click Clinic Schedule.

Waiting

<screen description – no audio> Spin icon displays for 1 second.

Clinic Schedule

<screen description – no audio> Scheduler (Clinic Schedule) page opens with agency/clinic header and Participant List sidebar.

<no audio> WAIT…

The Clinic Schedule has a page name of Scheduler but is a calendar of daily appointments.

Once any of these pages are opened, we have to return to Search to re-open our folder.

Click Search.

Re-Open Folder

Since our most recent search results remain until we clear them we can click the Open Folder icon on Ella's card.

Close Alert

Close the Alert.

Benefit Management 1

The rest of the sections provide navigation **within** the participant folder.

Continuing with the sidebar, and our view-only tour of the pages in the participant folder, the next section, Benefit Management provides navigation to pages for adding, adjusting and issuing benefits.

Add Set of Benefits allows us to extend a certification but has specific requirements that must be met and is often disabled.

In WINNIE, disabled links display a tooltip indicating why it's disabled.

Go ahead and hover over Add Set of Benefits.

Click the button to continue.

Benefit Management 2

Adjust Benefits is always enabled.

Click Adjust Benefits.

Adjust 1

It's always enabled but the participant must have benefits issued for the page to display.

OK. We started this module with a scenario in which we were assisting Moe using the IVR or customer service phone line.

But we also noticed that Ella and Linna both had appointments and were also due for benefits and said that if Moe had time, which, yay(!), she does, we could assist her further.

So, in partial keeping of our scenario, let's jump around a little and click on Appointments in the Participant Folder section of the sidebar.

Appointments

This is a household-level page that lists scheduled appointments for all household members.

Since both appointments are for nutrition education and benefit pickup, we can easily assist Moe further.

Best Practice would be to delete these appointments so that we could open the time slots for others.

However, we aren't going to review how to do that right now.

We'll cover that in the Schedule Appointments training modules.

Once we've completed the requirements for the appointments, we can issue their benefits.

Issue Benefits 1

Since this is basically a tour through all the pages in the participant folder, we'll just issue benefits behind the scenes.

Click the button to continue.

Aggregate

<screen description – no audio> Slide transitions from Issue Benefits page to Aggregated Issuance modal.

Again, click the button to continue.

Back to Demo

<screen description – no audio> Slide transitions from Aggregated Issuance modal to Demographics page.

Demo Again

Now let's check out Adjust Benefits.

<no audio> Click Adjust Benefits.

Waiting

<screen description – no audio> Spin icon displays for 3 seconds.

Adjust 2

Ella has current benefits so the Adjust Benefits page displays.

Let's jump around once more.

This time, click on Benefits History in the Participant Folder section of the sidebar.

<no audio> Click Benefits History.

Waiting

<screen description – no audio> Spin icon displays for 3 seconds.

Benefits Hx 1

The first record doesn't auto-expand on this page so let's toggle on the last set of benefits we just issued.

<no audio> Toggle on the 04/10/2023 - 05/09/2023 benefit set.

Benefits Hx 2

Click the button to continue.

Calendar

We'll jump around one more time.

When in the Participant Folder, the Calendar option is Scheduler.

Go ahead and click on it.

<no audio> Click Scheduler.

\<Waiting\>

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

Scheduler Page

Like the calendar page we opened earlier, this page is also called Scheduler.

But it opens in the participant folder, as indicated by the sidebar and the participant menu, which has been moved into the Schedule Appointment section.

This is the page we use to schedule appointments.

Scheduler Icon

It is the same page that opens when we click the icon on the participant card in Search.

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

\<Transition Slide\>

\<screen description – no audio\> Slide transitions back to Appointment Scheduler page.

PF List

The Participant Folder section includes all the different pages for documentation and continuity of care.

OK. Let's complete our tour of the Participant Folder without any more interruptions.

Go as quickly or slowly as you want, starting with Bloodwork.

\<screen only – no audio\>NOTE: Each of these pages is view-only. Their functionality will be reviewed in a training module specific to each topic.

\<no audio\> Click Bloodwork.

Bloodwork

Click Certification History.

Certification History

We've seen Demographics so let's skip to Document Imaging.

\<no audio\> Click Document Imaging.

Document Imaging

Click Food Prescription.

<Waiting>

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

Food Prescription 1

The Food Prescription page doesn't also auto-expand the first record so let's click on the link for the 6/2/23 food package.

<no audio> Click on the Effective Date for the 6/2/23 food package.

Food Prescription 2

Click Health Information.

<Waiting>

<screen description – no audio> Spin icon displays.

Health Info

Click Income.

Income

Click Length/Height/Weight.

Length/Ht/Wt

Click Manage Alerts.

Manage Alerts

Click Manage eWIC Account

Manage eWIC 1

Remember our scenario?

Well, this is the page we would look at to verify Moe is using the correct date of birth and zip code for the IVR/Customer Service Line.

Also, this is the other page, besides Demographics, that has the Household ID on the actual page and not just on the Participant Menu.

This page has a couple other pages tucked within it.

It opens to the eWIC Household Demographics page.

But also has links to Card History and Transaction History.

Click Card History.

<Waiting>

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

Card History

Click Transaction History.

<Waiting>

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

Transaction Hx1

Once again, this page doesn't display much at first.

But since we issued benefits today, to see the first level of information we can just click Search.

<no audio> Click Search.

Transaction Hx 2

Click Manage Notes.

<Waiting>

<screen description – no audio> Spin icon displays.

Manage Notes

Click Nutrition Assessment.

Nut Assess

Click Nutrition Education.

Nutrition Ed

Click Peer Counselor Contacts.

Peer Contact

To view the rest of the list, we could collapse the Clinic Actions section.

But we've done that.

So, this time, there is a tiny scroll bar we can use to view the rest of the list.

We can click and drag it or click below it.

We've highlighted where to click with a red box so click inside that red box to see the rest of the list.

<no audio> Click inside the red box below the tiny scroll bar.

More List

Let's continue our tour.

Click Referrals.

Referrals

Click Risk Factors.

Risk Factors

Click the button to continue.

Cert/MCA Option

The Certification/MCA section at the bottom is how we start an eligibility assessment, or certification, and a mid-certification assessment.

We'll see how that works in the Certification training module.

For now, we've completed our tour in, out, and around the participant folder using the sidebar.

Click the button to continue.

Test Your Knowledge

Multiple Choice Q#1 (multi-select)

Multiple Choice – select all that apply.

How do we close the participant folder?

    A. Click Search on the sidebar.

    B. Click the x in the top right corner of the Demographics page.

    C. Click any of the Clinic Actions menu options on the sidebar.

    D. Click Close in the Participant Folder section of the sidebar.

E. Click the Applications Toggle (Clinic Services) on the blue header.

Answer #1

The answers are A, C, and E.

We close the Participant Folder by navigating out of it when we click Search or click any of the options on the Clinic Actions menu, or if we click the Applications Toggle, which reads "Clinic Services" in the blue header.

T/F Q#2

True or False?

We can always find the Household ID in the Participant Menu.

Answer #2

The answer is False.

The Household ID does not display in the Participant Menu if there is only one member in the household.

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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