

WINNIE Important Functionality

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The following list was initially developed by St. Paul-Ramsey.

Use ctrl + F to “find” key words. TOC = Table of Contents.

Function	Concept	Notes	Training Reference	Where to Find in Training
Account Balance	Current balance (real-time)	<ul style="list-style-type: none"> Open the Participant Menu. Select Generate Account Balance. <p>NOTE: The Account Balance displays aggregated household food benefits by First Date to Use (FDTU). This may cause food items for the same family to be separated if some are issued on a different date (ex: 7/7/24-8/6/24 and 7/30/24-8/6/24).</p> <p>This is unlike the App, which displays all aggregated food items by Last Date to Use.</p>	<ul style="list-style-type: none"> Managing Downloads in: Google Chrome or Microsoft Edge Issue Benefits 1C - Overview 	<ul style="list-style-type: none"> Chrome/Edge TOC: Documents that Download 1C - TOC: Account Balance
Adjust Benefits	Change formula when some redemption	<ul style="list-style-type: none"> If BF or FP III, update Verified Date in Health Information. Select Adjust Benefits from sidebar. Proration? <ul style="list-style-type: none"> Available will show an amount before any is returned or recovered. Note this amount. (Ex: 2 Available) Unopened cans brought to clinic to exchange? <ul style="list-style-type: none"> Double-click into the Returned field in the Cans row. Enter the number of unopened cans brought to clinic. Press the Tab key. Double-click into the Recovered field in the Cans row. Enter the number of cans of the original formula you are taking off the card. Press the Tab key. Click the Add Formula button. Select the formula, max allowed will default into quantity. Click OK. 	<ul style="list-style-type: none"> Adjust Benefit 1A – Formula Scenario 1: New Medical Formula Adjust Benefits 1B – Formula Scenario 2: Increase Formula 	<ul style="list-style-type: none"> 1A – TOC: Adjust Formula, Add New Formula, Void Future Benefits, Food Prescription, Issue Benefits. 1B – TOC: Adjust Benefits Continued, Add Formula, Update Future Months, and Food Prescription.

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Adjust Benefits CONTINUED	Change formula when some redemption	<ul style="list-style-type: none"> ▪ Proration? <ul style="list-style-type: none"> ▪ Adjust amount in the Additional Qty field so that the same number that first displayed in the Available column displays again. (Ex: 2 Available) ▪ Toggle on Void for future months (can use Update Future Months to adjust and reissue if comfortable doing so). ▪ Click Send eWIC Data button. ▪ Select Food Prescription from the sidebar. ▪ Verify formula and quantity. ▪ If appropriate, create new food prescription(s) for the next set(s) of benefits that will be reissued. ▪ Reissue <i>voided</i> benefits in Issue Benefits. <p>NOTE: Available is the number of cans WINNIE will allow you to provide. If prorated, a number will display before any changes are made. This is the quantity that was not issued due to proration. Since MN WIC policy requires any changes in formula follow the initial issuance's proration, the Additional Qty must be adjusted so that this same number continues to display in the Available column before sending eWIC data.</p>		
Adjust Benefits	Change issued milk when some redemption	<ul style="list-style-type: none"> ▪ Select Adjust Benefits from sidebar. ▪ Proration? <ul style="list-style-type: none"> ▪ Available will show an amount before any is recovered. Note this amount. (Ex: 1 Available) ▪ Double-click into the Recovered field in the Milk row. ▪ Enter the number of gallons from: <ul style="list-style-type: none"> ▪ The Amt Issued column if Amt Issued \leq HH Balance ▪ The HH Balance column if Amt Issued $>$ HH Balance ▪ Press the Tab key. ▪ Click the Add Food Item button. ▪ Select Milk and the new Food Item. ▪ The Quantity will default to the maximum allowed. If Remaining in Calculator is a negative number, decrease the quantity until Remaining = 0. ▪ Click OK. 	Adjust Benefits 2A – Food Scenario 1	TOC: Recover, Add New Food Item

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Adjust Benefits CONTINUED	Change issued milk when some redemption	<ul style="list-style-type: none"> Proration? <ul style="list-style-type: none"> Adjust amount in the Additional Qty field so that the same number that first displayed in the Available column displays again. (Ex: 1 Available) Toggle on Void for future months (can use Update Future Months to adjust and reissue if comfortable doing so). Click Send eWIC Data button. Select Food Prescription from the sidebar. Verify food items and quantities. If appropriate, create a new food prescription for the next set(s) of benefits that will be reissued. Reissue <i>voided</i> benefits in Issue Benefits. <p>NOTES: Available is the quantity of the food item WINNIE will allow you to provide. If prorated, a number will display before any changes are made. This is the quantity that was not issued due to proration. Since MN WIC policy requires any changes follow the initial issuance's proration, the Additional Qty must be adjusted so that this same number continues to display in the Available column before sending eWIC data.</p>		
Breastfeeding Amount	Change BF Amount to different BF Amount	<ul style="list-style-type: none"> Change infant's Breastfeeding Amount in Health Information and adjust formula as appropriate in Adjust Benefits. Leave mom's current benefits as-is if any redemption, void future benefits, and reissue new food package (if impacted by BF Amount change) 	<ul style="list-style-type: none"> Adjust Benefits 1B – Formula Scenario 2: Increase Formula Adjust Benefits 1C – Formula Scenario 3: Change BF Amount & Add Formula 	<ul style="list-style-type: none"> Modules review entire process. <p>Reviews when appropriate to adjust mom's benefits:</p> <ul style="list-style-type: none"> 1B – TOC: What Should We Do? 1C - TOC: Breastfeeding Dyad
Bugs/Issues	NA	This is a working document, and the electronic version should be bookmarked (instead of printing).	Transition Guide	Local Agency page >> Staff Resources Section >> Information System dropdown >> WINNIE Information System page
Cert/MCA	Start cert or MCA	Last or bottom section on the left sidebar in the participant folder.	Certification 1A	TOC: Start Certification Messages

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Clinic Schedule	Differences from Scheduler	<ul style="list-style-type: none"> Cannot open from within the Participant Folder. Cannot schedule new appointments. Cannot reschedule appointments at a different clinic. 	<ul style="list-style-type: none"> Scheduler 5A – Clinic Schedule Scheduler 5B – Clinic Schedule 	<ul style="list-style-type: none"> 5A TOC – Clinic Schedule >> Search 1 5B – TOC: Reschedule in Clinic Schedule
Direct Ship	Issuing a partial or full package by direct ship	<ul style="list-style-type: none"> In Issue Benefits, toggle on Direct Ship for the current month of benefits. The Direct Ship Items card opens at the bottom of the page. Select In Stock from the Ship To dropdown. Enter the number of cans being direct shipped into the Direct Ship Quantity field (can be some or all – any cans not direct shipped will be added to the card). NOTE: You can also change issued benefits to direct shipped benefits or vice-versa in Adjust Benefits. 	<ul style="list-style-type: none"> Issue Benefits 3B – Direct Ship Adjust Benefits 1G – Direct Ship Scenario 1 Adjust Benefits 1H – Direct Ship Scenario 2 	<ul style="list-style-type: none"> 3B – TOC: Direct Ship 1G – TOC: Direct Ship in Adjust Benefits 1H – TOC: Direct Ship Review, Return Cans, and Add New Formula
Download Folder	Delete contents daily	<ul style="list-style-type: none"> Click the folder icon (File Explorer) on taskbar. Click on Downloads in left panel. Click on files to be deleted (CTRL + A to select all). Click the dropdown arrow under Delete in the toolbar. Select Permanently delete. Click Yes on the “Are you sure...?” message 	Managing Downloads in: Google Chrome or Microsoft Edge	TOC: Managing Downloads
Income	Document accurate household income for families that don’t work year-round (non-standard income)	<p>Staff will have to calculate non-standard calculations outside of the system.</p> <ul style="list-style-type: none"> Calculate the income based on the appropriate number of weeks, months, or time periods. Annualize the income. Enter income into WINNIE as Yearly income. Document in an appropriate note (SOD or income). Ex: \$3251/month x 9 months = \$29259 per year. 	Income 3A: Traditional Income	TOC: Non-Standard Durations
Login	Bookmark login	Once logged in and on Module Launcher page, click and drag icon in address bar to My Favorites bar.	Accessing WINNIE 3	TOC: Bookmark WINNIE Login Page https://appwinnie.mnwic.net

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Function	Concept	Notes	Training Reference	Where to Find in Training
Multi-purpose Affidavit	No Proof of Identity, Residency, or Income Waiver	<ul style="list-style-type: none"> ▪ Select Documents on left sidebar. ▪ Click Multi-purpose affidavit. ▪ Language defaults to English. Select Spanish if appropriate. ▪ Click OK. ▪ Document opens in another browser tab. ▪ Click the printer icon in the top right to print. 	Document Overview 1	TOC: Clinic Actions >> Affidavit
Official Notification	Print Letter of Ineligibility or Official Notification	<ul style="list-style-type: none"> ▪ Open the Participant Menu. ▪ Select Generate Official Notice. ▪ Document opens in another browser tab. ▪ Click the printer icon in the top right to print. 	Document Overview 2	TOC: Official Notification
Pop-ups	Able to generate documents in WINNIE	<p>Ensure pop-ups allowed for WINNIE</p> <ul style="list-style-type: none"> ▪ Browser Settings for Microsoft Edge ▪ Browser Settings for Google Chrome 	Document Overview 1	TOC: Pop-up Blockers
Proofs	Add proof of ID/Residency	<ul style="list-style-type: none"> ▪ Cert Mode: Proofs on sidebar ▪ Participant Folder/VOC: Participant Menu >> Proofs 	<ul style="list-style-type: none"> ▪ Certification 1C ▪ Participant Menu 2 ▪ VOC 1B 	<ul style="list-style-type: none"> ▪ 1C - TOC: Proofs ▪ 2 - TOC: Proof of Identity; Proof of Residency ▪ 1B - TOC: Documenting Proofs
Scheduler	Calendar view in Scheduler	<ul style="list-style-type: none"> ▪ The Calendar can be viewed by Day, Week, or Month. ▪ The default is Day. ▪ In general, you should not select Month because it generates a calendar with all appointments listed for each day and may time out before it can open. 	Scheduler 1A - Overview	<ul style="list-style-type: none"> ▪ TOC: Calendar (in Scheduler) ▪ TOC: Month View in Calendar
Scheduler	Print the Clinic Schedule	<ul style="list-style-type: none"> ▪ Open the Clinic Schedule (Search sidebar) or Scheduler (Icon on Search card or Participant Folder sidebar). ▪ Select the day you want to print. ▪ Click the General Clinic Schedule button. ▪ Delete/filter resources (include those you want in output). ▪ Click the OK button. ▪ The document opens in another browser tab. ▪ Click the Print icon to print a hard-copy. <p>NOTE: Since the document opens in another browser tab, you can keep that tab open as a reference if you don't want to print it.</p>	Scheduler 1B - Overview	<ul style="list-style-type: none"> ▪ TOC: Generate Clinic Schedule

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Scheduler	Edit, Reschedule, Delete Appointments	<ul style="list-style-type: none"> Single-click Appointment Details modals. <ul style="list-style-type: none"> Edit, Reschedule and Delete buttons. (You can also delete a future appointment from the Appointments page in the Participant Folder.) Toggle on Kept, Confirm (future appointments only), Follow-up (past appointments only), and open the Participant Folder. Double-click to edit the Appointment Type, Duration, etc. 	<ul style="list-style-type: none"> Scheduler 4A – Appointment Details Scheduler 2B – Participant Appointments 	<ul style="list-style-type: none"> 4A - TOC: Edit Appointments 4A - TOC: Reschedule Appointments 2B – TOC: Delete 1
Shopping List	Issued benefits (snapshot of issuance)	<ul style="list-style-type: none"> Open the Participant Menu. Select Generate Account Balance. Select either Household or Participant. <p>NOTE: The Household Shopping List is separated by individual members of the household and also provides an aggregated household list.</p> <p>The Participant shopping list has only those food items issued to the specific member.</p>	<ul style="list-style-type: none"> Managing Downloads in: Google Chrome or Microsoft Edge Issue Benefits 1C - Overview 	<ul style="list-style-type: none"> Chrome/Edge TOC: Documents that Download 1C - TOC: Shopping List
User Tips	Tips, reminders, questions, and lessons learned from Pilots	Topics: Account Balance, Benefit Issuance, Calendars, Certification Mode, Food Prescription, Logging in, Navigation Shortcuts, Scanners, Scheduler, Screen Real Estate, Session Settings, Signature Pad, SWIPE, Where is, and WIC Card	WINNIE User Tips	NA
VOC Document	Produce VOC Document	<ul style="list-style-type: none"> Open the Participant Menu. Select Produce VOC Document. Per Agency guidance, toggle on Terminate Participant as appropriate (and complete required fields). Click OK. The document opens in another browser tab. Click the Print icon to print a hard-copy. 	VOC Document	NA

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WIC Category	Change BF to NBF if more than 6 months postpartum	<ul style="list-style-type: none"> ▪ Issue last set of benefits to mom. ▪ Select Health Information from the sidebar. ▪ Click the Infants Born from This Pregnancy button. ▪ Click the Edit button. ▪ Toggle off Breastfeeding Now and complete required fields. ▪ Save and system will automatically terminate mom's cert. 	Demographics 1B – WIC Category Changes	TOC: What We Should Do

Reference – List of Hyperlinks

- [Managing Downloads in Google Chrome](https://www.health.state.mn.us/training/cfh/wic/winnie/docs3a/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/docs3a/index.html)
- [Managing Downloads in Microsoft Edge](https://www.health.state.mn.us/training/cfh/wic/winnie/docs3b/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/docs3b/index.html)
- [Issue Benefits 1C - Overview](https://www.health.state.mn.us/training/cfh/wic/winnie/issue1c/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/issue1c/index.html)
- [Adjust Benefits 2A – Food Scenario 1](https://www.health.state.mn.us/training/cfh/wic/winnie/adjust2a/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/adjust2a/index.html)
- [Adjust Benefits 1B – Formula Scenario 2: Increase Formula](https://www.health.state.mn.us/training/cfh/wic/winnie/adjust1b/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/adjust1b/index.html)
- [Adjust Benefits 1C – Formula Scenario 3: Change BF Amount & Add Formula](https://www.health.state.mn.us/training/cfh/wic/winnie/adjust1c/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/adjust1c/index.html)
- [Transition Guide](https://www.health.state.mn.us/docs/people/wic/localagency/winnie/transition.pdf) (https://www.health.state.mn.us/docs/people/wic/localagency/winnie/transition.pdf)
- [Certification 1A](https://www.health.state.mn.us/training/cfh/wic/winnie/cert1a/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/cert1a/index.html)
- [Scheduler 5A – Clinic Schedule](https://www.health.state.mn.us/training/cfh/wic/winnie/scheduler5a/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/scheduler5a/index.html)
- [Scheduler 5B – Clinic Schedule](https://www.health.state.mn.us/training/cfh/wic/winnie/scheduler5b/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/scheduler5b/index.html)
- [Issue Benefits 3B – Direct Ship](https://www.health.state.mn.us/training/cfh/wic/winnie/issue3b/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/issue3b/index.html)
- [Adjust Benefits 1G – Direct Ship Scenario 1](https://www.health.state.mn.us/training/cfh/wic/winnie/adjust1g/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/adjust1g/index.html)
- [Adjust Benefits 1H – Direct Ship Scenario 2](https://www.health.state.mn.us/training/cfh/wic/winnie/adjust1h/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/adjust1h/index.html)
- [Income 3A: Traditional Income](https://www.health.state.mn.us/training/cfh/wic/winnie/income3a/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/income3a/index.html)
- [Accessing WINNIE 3](https://www.health.state.mn.us/training/cfh/wic/winnie/access3/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/access3/index.html)
- [Document Overview 1](https://www.health.state.mn.us/training/cfh/wic/winnie/docs1/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/docs1/index.html)
- [Document Overview 2](https://www.health.state.mn.us/training/cfh/wic/winnie/docs2/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/docs2/index.html)
- [Certification 1C](https://www.health.state.mn.us/training/cfh/wic/winnie/cert1c/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/cert1c/index.html)
- [Participant Menu 2](https://www.health.state.mn.us/training/cfh/wic/winnie/menu2/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/menu2/index.html)
- [VOC 1B](https://www.health.state.mn.us/training/cfh/wic/winnie/voc1b/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/voc1b/index.html)
- [Scheduler 1A - Overview](https://www.health.state.mn.us/training/cfh/wic/winnie/scheduler1a/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/scheduler1a/index.html)
- [Scheduler 1B - Overview](https://www.health.state.mn.us/training/cfh/wic/winnie/scheduler1b/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/scheduler1b/index.html)

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[Scheduler 4A – Appointment Details](https://www.health.state.mn.us/training/cfh/wic/winnie/scheduler4a/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/scheduler4a/index.html)

[Scheduler 2B – Participant Appointments](https://www.health.state.mn.us/training/cfh/wic/winnie/scheduler2b/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/scheduler2b/index.html)

[Issue Benefits 1C - Overview](https://www.health.state.mn.us/training/cfh/wic/winnie/issue1c/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/issue1c/index.html)

[WINNIE User Tips](https://www.health.state.mn.us/people/wic/localagency/winnie/usertips.html) (https://www.health.state.mn.us/people/wic/localagency/winnie/usertips.html)

[VOC Document](https://www.health.state.mn.us/training/cfh/wic/winnie/vocdoc/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/vocdoc/index.html)

[Demographics 1B – WIC Category Changes](https://www.health.state.mn.us/training/cfh/wic/winnie/demo1b/index.html) (https://www.health.state.mn.us/training/cfh/wic/winnie/demo1b/index.html)

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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