Participant Menu 1 – WINNIE Online Training Module

MARCH 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It's the first module providing an overview of some of the functions in the Participant Menu in WINNIE, the MN WIC Information System.

Actions Menu

Date

All dates in this module are based on today's date being March 16, 2023.

<Transition Slide>

<screen description – no audio> Screen transitions from topic slide to Ella Ment's Demographics page in her Participant Folder.

Demographics

Go ahead and open the Participant Menu.

Click anywhere for a hint.

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

Participant Menu

The menu actions, listed alphabetically, can be performed no matter what page we are working in.

Roles

The actions we see are again based on the functions our assigned roles allow us to perform.

In this Module

Most of these actions will be covered in other training modules but the few that are specific to this menu, or have limited functionality, we'll look at now.

Click the button to continue.

Issuance Frequency

<Transition Slide>

<screen description – no audio> Slide transitions from topic slide to Participant Folder with open Participant Menu.

Issuance Frequency

We'll start with Issuance Frequency.

Select it from the menu.

<no audio> Select Issuance Frequency.

Issuance Frequency 1

Issuance Frequency is how often a participant is issued benefits and dictates the number of months automatically suggested by the system in Issue Benefits.

Click the dropdown.

Issuance Frequency 2

Our options are once every month, every two months, or every three months.

The default is set at the agency level, and all are currently tri-monthly.

Transition Slide

This function is rarely used because…

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

Issue Benefits 1

…as we'll see when we look at benefit issuance, we can also change the number of months of benefits when issuing.

\<Transition Slide\>

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

Use Case

However, it's available if the frequency should be changed for more than just the current issuance (for instance if a time-specific disciplinary action were to be taken for program abuse; an exceedingly rare occurrence).

Click the dropdown to close it.

Close Frequency

Click Cancel to close the modal.

\<no audio\> Click the Cancel button.

\<Transition Slide\>

\<screen description – no audio\> Screen transitions from Ella Ment's Demographics page in her Participant Folder to topic slide.

Terminate/Reinstate

\<Transition Slide\>

\<screen description – no audio\> Screen transitions from topic slide to Ella Ment's Demographics page in her Participant Folder.

Open Menu 1

Open the Participant Menu.

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

Terminate

We can terminate a participant's certification.

Select Manually Terminate Participant.

Term Date

The Termination Date defaults to the current date.

Click the Calendar Control.

Calendar

Like all calendar controls in WINNIE, only dates that are appropriate to select are enabled.

For instance, for this field, we can only enter today and future dates so dates prior to today are disabled.

If we type a date outside of the allowed parameters…

<Transition Slide>

<screen description – no audio> Slide transitions to Manually Terminate Participant modal with typed date of 12/15/23.

Validation Msg

<screen description – no audio> Manually Terminate Participant modal with 12/15/23 entered and message that reads "This date cannot be greater than the participant's certification end date (11/30/2023)."

…such as entering a date after the Cert End Date when terminating a participant, a validation message displays.

Click the button to continue.

Best Practice

In general, we don't enter future dates for terminations.

Even if a participant calls and says they are moving out of state at the end of the month, things change and there is no harm in leaving their record active.

We can wait for the system to terminate them for Failure to Pick-up or for their cert to expire on its own.

Reason

That said, there are reasons we may need to terminate a record today and the Termination Reason is required.

Click the dropdown.

Reasons Change

We need to note that contents of dropdowns are subject to change and that these are the options available at the time this training module was developed.

Reasons 1

A few of these are system reasons, but most are reasons we might select.

Death of Participant requires further documentation and changing the participant's household ID.

A cheat sheet is available to assist us if this occurs.

Fraud/Abuse is extremely rare and if this were to occur termination for this reason has to come from the State Office.

Reasons 2

The options whereby the participant no longer meets program requirements, including income and residency, are used when unable to assess eligibility at certification and when pending proof is verified it's determined that the participant doesn't meet the WIC guidelines.

Participant Requested Termination is also rare, but it has been known to happen.

Reasons 3

Recertified as B or N, or Breastfeeding or Non-breastfeeding, is obsolete.

We can start a pregnant woman's certification as postpartum at any time prior to her Cert End Date in WINNIE.

Select Reason

If we are terminating for some reason not listed here, we can select Other (explain in notes) and must document the reason.

Let's select Participant Requested Termination.

Official Notification 1

When we a terminate a participant's certification we are indicating ineligibility for the WIC Program.

We are required to provide, in writing, either a hard copy (if in person or mailing) or electronic copy if sending by electronic means, the reason for their ineligibility, as well as their right to a fair hearing.

This requirement is met by generating and providing the Official Notification.

Go ahead and toggle on Generate Official Notification.

Save Terminate

Click the Save button.

\<Transition Slide\>

\<screen description – no audio\> Slide transitions from Demographics to Ineligibility Letter.

Official Notification 2

The Letter of Ineligibility opens in another tab in our default browser when we generate the Official Notification.

As required, it provides the reason and informs the participant of their right to a fair hearing.

We should always sign the document when providing it.

Data Privacy 1

This letter also has the participant's name and household's residential address, which are both private data.

We must always be aware that a participant's information is private, and we are responsible for ensuring it is secure.

Data Privacy 2

If printing a document with private data, we should immediately retrieve it from the printer and only provide it to the participant or caregiver.

If emailing electronic documents with private data, we should ensure the email is encrypted.

We should contact our local IT for more information about how to encrypt our email.

Official Notification 3

This letter does not need to be provided for terminations typically performed by the system: Failure to Pick-up, Categorical Ineligibility, and Certification Expired.

More information about documents will be provided in the Documents training module.

\<Transition Slide\>

\<screen description – no audio\> Slide transitions from Ineligibility Letter to Demographics.

After Term

Let's click Manage Notes on the sidebar.

\<Waiting\>

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

Manage Notes

The system creates a note when we generate an Official Notification.

<screen description – no audio> System note has date provided, Termination Date and Termination Reason in the body of the note.

Next, let's click Search to exit the folder.

Details 1

Toggle on Show Details.

Details 2

In Show Details, the Termination Date and Reason now display.

Go ahead and open Ella's folder again.

Alert 1

Close the alert.

Issue Benefits 2

When a participant is no longer eligible for benefits, in this case due to being manually terminated, Issue Benefits on the sidebar is disabled and that page cannot be opened from this member's folder even if other household members **are** eligible for issuance.

If we hover over Issue Benefits, we can see why it's disabled.

Go ahead and do that.

Click the button to continue.

<no audio> Hover over Issue Benefits in the sidebar.

Disabled Fields

When a participant isn't in a current cert, fields on assessment-related pages are disabled.

For instance, we can still update Demographic information, scan or import documents, and add Alerts, make changes to their WIC Card, and add Notes but if we click on Health Information…

<no audio> Click Health Information.

<Waiting>

<screen description – no audio> Spin icon displays.

Disabled HI

…all fields are disabled and we aren't able to add any records in bloodwork, food prescription, income, length/height/weight, nutrition assessment or education, etc.

Let's open the Participant Menu again.

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

Reinstate

Notice that now our option is to Reinstate Terminated Participant.

This option displays when the participant's Cert End Date is in the future and their current certification has been manually terminated or system-terminated for failure to pickup.

Go ahead and reinstate her.

<no audio> Select Reinstate Terminated Participant.

Reinstate Message

We so want to reinstate her so click Yes.

<Waiting>

<screen description – no audio> Spin icon displays.

Enabled Fields

Once reinstated, the fields are re-enabled and if we were to view Show Details again…

<no audio> Click Search.

Details 3

…go ahead and toggle it on…

<failure message – audio> Toggle on Show Details.

Details 4

…we see the Termination Date and Reason no longer display.

Go ahead and open Ella's folder again.

Alert 2

Close the alert.

<Transition Slide>

<screen description – no audio> Slide transitions from Demographics to topic slide.

Policy 1

For more information about the policy referenced in this module, please refer to the MN Operations Manual, or MOM, on the MDH WIC website.:

https://www.health.state.mn.us/people/wic/localagency/mom.html

1. Administration, Section 1.7 Data Privacy

https://www.health.state.mn.us/docs/people/wic/localagency/program/mom/chsctns/ch1/sctn1_7.pdf

5. Certification, Section 5.4 Notification of Ineligibility/Disqualification

https://www.health.state.mn.us/docs/people/wic/localagency/program/mom/chsctns/ch5/sctn5_4.pdf

Click the button to continue.

Test Your Knowledge

Multiple Choice Q#1 (select one)

Multiple Choice – select one.

We must generate an Official Notification and provide a Letter of Ineligibility to a participant when:

- A.   A participant indicates they are moving out-of-state.
- B.   We terminate the participant for not meeting program requirements.
- C.   The system auto-terminates the participant for failure to pick up.
- D.   Every time a participant's certification is terminated.
- E.   All of the above.

Answer #1

The answer is B.

The Official Notification, which is the Letter of Ineligiblity, must be provided when a participant's cert is terminated for not meeting income, residency, or other program requirements.

T/F Q#2

True or false.

We can only perform the functions found in the Participant Menu while on the Demographics page.

Answer #2

The answer is False.

We can open the Participant Menu on any page in the Participant Folder and perform any of the functions listed.

T/F Q#3

True or false.

A participant's name and address are considered private data and must be kept secure.

Answer #3

The answer is True.

The information we collect in WINNIE, including the participant's name and address, is private and we are responsible for keeping it protected and secure.

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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