Prescreen 1 – WINNIE Online Training Module

APRIL 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It reviews how to create new households by prescreening new applicants, in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being April 12, 2023.

Prescreen Applicants

Prescreening

Prescreening is the process by which all applicants are assigned a Household ID and State WIC ID and are added to the MN WIC database.

Any person receiving any WIC services, including scheduling an appointment, must first have a record in our database.

The Prescreen Applicants page collects basic member and household-level demographic information.

<Transition Slide>

<screen description – no audio> Information slide transitions to Participant Search page.

Create New Household

Database Records

We Create a New Household if an applicant, as well as any members of the applicant's family, haven't participated in the MN WIC Program before.

We retain full database records for 3 years after the last activity date but maintain "skeleton" records for 6 years so if they've participated in MN WIC before, odds are pretty good that they may still be in our database.

Double-Check 1

Best Practice is to first ask if anyone has ever received WIC benefits in MN in their family because we always want to double-check if an applicant or a member of their family is already in the database.

And really, these are two different things.

First, we want to make sure to add our new applicant to the correct household.

If the household already exists, we use Add Member instead.

For instance, mom or one of the children in the family may have participated in MN WIC previously, so it needs to occur to us that they may already have a household ID.

Second, we want to try **not** to create a duplicate participant record.

Applicants may have been previously prescreened but not certified, or maybe they participated in WIC a couple of years ago, or it could be as simple as the applicant not completely understanding our question.

Double-Check 2

In general, we always want to ask if the applicant or anyone in their family has ever received formula or foods from WIC in MN before.

<screen description – no audio>

WIC Staff: Have you or anyone in your family ever gotten formula or foods from WIC in Minnesota before?

Double-Check 3

If our applicant indicates they haven't, for all the reasons we indicated before, we should **still** double-check whether the person for whom we are about to create a record is in the database since there is also a fraud component to duplicate records.

We can do this by performing a general Statewide search.

Best to use just the first couple of letters of their first and/or last names, since spelling names correctly can sometimes be problematic, and their date of birth, which will really help narrow the search.

Search 1

We are going to walk through prescreening Bea Free, a breastfeeding mother, and her infant.

Let's start by seeing if Bea might already have a record.

Where are we going to Search? Go ahead. Click anywhere for a hint.

<hint – audio> Click the Statewide button.

Search 2

We'll do that partial search for her last name and first name with her birth date.

Click into the Last Name field…

<screen description – no audio>

WIC Staff: What is your name and birthday?

WIC applicant: "It's Bea Free. My birthday is 5/13/98."

Search 3

…Type FRE then click into the First Name field or press the Tab key.

Search 4

Type B and click into the Date of Birth field.

Search 5

Type 5/13/98 then either click Search or press the Enter key.

No Results

Looks like we should be good to go; we have done our due diligence.

Click Create New Household on the sidebar.

Applicant Prescreen

The Applicant Prescreen page opens.

We're going to start by clicking below the scroll bar.

Validations 1

Now let's just click the Save button.

Validations 2

WINNIE will ensure all required fields on any pages are completed when we click Save and displays "This field is required" beneath it if it hasn't been.

Reset

Clicking the Reset button, clears any changes made to the page.

Go ahead and click it.

<no audio> Click the Reset button.

Save Changes Msg

And click Yes.

Scroll

Click above the scroll bar.

Member Info

The first section is Member-level information.

The name fields have character limits of 25 and 20, respectively.

They accept the following characters: comma, period, hyphen, apostrophe and space.

Numbers are not allowed.

Last Name 1

Let's enter Bea's names.

Type Free into the Last Name field then click into the First Name field or press the Tab key.

First Name 1

Type Bea then click into the Date of Birth field.

DOB 1

Type 5/13/98 then click the WIC Category dropdown.

WIC Category 1

The WIC Category is also called WIC Status or WIC Type and is sometimes represented just by its first letter.

Bea is Breastfeeding. Select that.

<no audio> Select Breastfeeding.

WIC Category 2

When any of the WIC Categories assigned to women are selected, the Gender defaults to Female and becomes disabled.

Most of the rest of this page collects Household-level information.

Physical Address 1

We collect both the Physical and Mailing Address and both of these fields allow letters and numbers as well as the ampersand, apostrophe, comma, forward slash, hyphen, period, pound sign and of course, spaces.

The Physical Address is where the applicant is currently living and allows up to 50 characters.

Physical Address 2

The County defaults based on the agency we are working in.

Since participants can seek services in any county that best works for them, if this needs to be changed, we should do that before selecting the city since the list of cities that displays in the dropdown is dependent on the County.

Bea does live in Hennepin so let's add her address.

Click into the Physical Address field.

<screen description – no audio>

WIC Staff: And where do you live? What is your address?

WIC applicant: "123 This Road, Hopkins, MN 55343."

Address

Type: 123 This Road then click the City dropdown.

City

Bea lives in Hopkins.

<no audio> Select Hopkins.

Zip Code 1

Click the Zip Code dropdown.

Zip Code 2

The Zip codes that populate are dependent on the city we've selected.

Select 55343.

PO Box

Policy dictates that the Physical Address cannot be a PO Box, except if participating in the Safe at Home Program.

The **Mailing** address **can** be a PO Box.

Copy Address 1

But it is most often the same address as where they live, which is why the Copy Physical Address button is a handy shortcut.

Note that the mailing address does not have a dropdown for City or Zip Code and, if different, requires us to type them in.

We should always be careful to correctly type that information and if it is the same, always use the Copy button.

Copy Address 2

Bea receives mail at her home so go ahead and click the button.

<screen description – no audio>

WIC Staff: Is your mail sent to this same address?

WIC applicant: "Yep. We have a mailbox."

<no audio> Click the Copy Physical Address button.

Mailing Address

The Mailing address is sent to our WIC Processor and although WINNIE will allow us to enter 50 characters, the WIC Processor has a limit of 30.

So, essentially, our limit is also 30 characters.

The Mailing Address's zip code is associated with the WIC Card and is one of the validations used to set or reset the Card's PIN.

Homeless

If Homeless, both address fields are still required, and we should record the address or location where they routinely live or spend the night.

If there isn't a fixed or official address, we should write a description of where they are living, such as "living in family's car" or just enter "Homeless" into the field.

We can always document more information in Notes if necessary.

We also need to make sure the Mailing Address Zip Code makes sense to them since they will need to know it for their PIN.

Contact Info

None of the fields in the Contact Information section are required.

Go ahead and click into the Primary Telephone field.

Telephone 1

The default area code is, again, based on the agency we are working in.

The two Comment fields have a limit of 30 and allow the same characters as our address fields.

Click the button to continue.

<screen description – no audio> Alphanumeric, ampersand, apostrophe, comma, forward slash, hyphen, period, pound sign and of course, spaces.

Telephone 2

Click into Primary Telephone field after the area code.

<screen description – no audio>

WIC Staff: Do you have a telephone number you'd be OK with us using to contact you?

WIC applicant: "Sure. My cell is 612-123-4567."

Telephone 3, 3A and 3B

Type: 1234567 then click into the Comment field or press the Tab key.

Comment 1

Since it's OK to leave a message, let's type "Message OK", "Msg OK".

<screen description – no audio>

WIC Staff: Would it be OK if we were to leave a message?

WIC applicant: "Sure."

Comment 2

Click the button to continue.

<screen description – no audio>

WIC Staff: Is there another number we can reach you at?

WIC applicant: “No. Not really.”

Email 1

We will want to enter an email if our agency sends automated appointment reminder emails or uses household emails for another type of communication, and our applicant or family is interested in receiving them.

There are validations but the only one that is impactful is that the email must have an “at sign” (@).

Our agency uses the system’s reminder emails and Bea is OK with getting them so let’s click into the Email field...

<screen description – no audio>

WIC Staff: We send email appointment reminders. Are you interested in receiving those.

WIC applicant: “Definitely. My email is beafree127@test.com.”

Email 2

Type: beafree127@test.com then click below the scrollbar.

Language

The Language defaults to English.

It is essential that we provide services, as much as is possible, based on our family’s language preference.

Even if we only have English-speaking staff, we should still always document if the family’s preference is another language and whether it is Read and/or Spoken.

This can help us determine the appropriate language for any documentation we may be able to provide in another language.

We have a lot of languages to choose from.

Go ahead and click the Primary Language dropdown.

Language 2

When ready, click below the scroll bar.

Language 3

Click the dropdown again to close it.

<no audio> Click the Primary Language dropdown.

Language 4

We can also indicate if there is a Secondary Language preference and whether it is Read and/or Spoken.

We may recognize Correspondence Preference from the Documents training modules and if we click the dropdown…

<no audio> Click the Correspondence Preference dropdown.

Language 5

…we'll remember that currently our only options are English and Spanish, and furthermore, only specific documents will print in Spanish if selected.

Again, click the dropdown to close it.

<no audio> Click the Correspondence Preference dropdown.

Interpreter

To ensure we are providing equitable and effective services, if a family does not speak English as their primary language and has limited ability to read, write, speak, or understand English, we must offer to provide an interpreter for all WIC contacts.

The Interpreter toggle should always be **toggled on** if the family requires or requests an interpreter for WIC services.

Other Section

The Other section contains two miscellaneous fields: How Heard about WIC, which is required and the Clinic Assigned, which defaults to the site we are currently working in.

Click the How Heard about WIC dropdown.

How Heard about WIC

There are a lot of options to choose from that should cover the gamut so ideally, we aren't having to choose Other or None Selected but they are there if we need them.

Go ahead and select Family/Friend.

<screen description – no audio>

WIC Staff: Can you tell me how you heard about the WIC Program?

WIC applicant: “Yeah, my friend Daisy gets WIC and she told me about it.”

Clinic Assigned 1

We are working in the South clinic today.

Go ahead and click the dropdown.

<no audio> Click the Clinic Assigned dropdown.

Clinic Assigned 2

We can select a different clinic within our agency based on the family’s preferences for location, hours, etc.

Click the dropdown again to close it.

<screen description – no audio>

WIC Staff: We have a couple of different locations for in-clinic visits…

WIC applicant: “I actually work downtown so where you suggested works for me.”

Auth Rep 1

Since none of the fields are required in the Authorized Representative section, we are going to wait and complete them when we prescreen the next household member, but we’ll still walk through the fields now.

The Authorized Representative is usually the mom if part of the WIC household or the primary caregiver when mom isn’t part of the WIC household.

If our agency chooses to complete the Relationship field…

…go ahead and click the dropdown....

<no audio> Click the Relationship dropdown.

Auth Rep 2

…we want to select the option that best represents the Authorized Representative’s **relationship with an infant or child in the household** (even if there isn’t an infant or child currently in the household).

Click to close the dropdown.

<no audio> Click the Relationship dropdown.

Auth Rep 3

MN WIC does not collect Marital Status nor Voter Registration and the options in their respective dropdowns reflect this.

Let's click the Educational Level dropdown.

Auth Rep 4

This has options because our agency can choose to collect this information.

Click below the scroll bar to view the rest of the options.

Auth Rep 5

Although we said none of the fields in this section are required, if we were to make a change, such as selecting Education Level, then the Last Name and First Name fields become required.

Click to close the dropdown.

<no audio> Click the Educational Level dropdown.

VOC & IC

The VOC Certification can be toggled on if we are performing an out-of-state transfer.

We are always required to create an Initial Contact record when completing the Prescreen page and we'll see how both the VOC and Initial Contact work in their respective training modules.

Since the Initial Contact is required, we can simply open the modal…

<no audio> Click the Initial Contact button.

Initial Contact 1

…and create the Initial Contact record by clicking OK.

Go ahead and do that.

<no audio> Click the OK button.

Calculator 1

The Income Calculator is just that, a calculator.

It can be used to assess whether a family's income meets the WIC guidelines, but it does not save any of the income information entered to the database.

Calculator 2

<screen description – no audio> Slide transitions to the Income Calculator modal showing the message for an eligible household and indicating the information does not save then transitions to the Income Calculator modal showing the message for an ineligible household and, again, that the information does not save.

We will learn more about using the income calculator in the Income Assessment training modules.

<Transition Slide>

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

On Completion 1

The last section is On Completion and our default is to Open the Participant Folder after we click Save.

Go ahead and click the dropdown.

<no audio> Click the On Completion dropdown.

On Completion 2

We can also Add Another Household Member or Return to the Participant List.

Since we also want to Prescreen Bea's infant, we are going to Add Another Member.

<no audio> Select Add Another Member.

Finish Prescreen 1

To add Bea's new record to the database, click the Save button.

Add Member 1

Notice a new household ID has been assigned and now displays at the top of the page and that most of the information on the rest of the page has auto-populated since it's household-level.

There are just a couple of new things to mention while we add the next household member.

Bea's baby's name is Arya Free. Enter her last name then first name.

<no audio> Type: Free then click into the First Name field or press the Tab key.

First Name 2

<no audio> Type Arya then click into the Date of Birth field.

DOB 2

If Arya's birth date were between 1 and 5 years ago, go ahead and enter 4/7/22 and **press the Tab key** on the keyboard…

WIC Category 3

…the system auto-selects Child as the WIC Category.

Using the calendar control this time, let's enter Arya's actual birth date of April 7, 2023.

Click the Calendar Control.

Calendar 1

Click the APR 2022 button.

Calendar 2

Select 2023, the correct year.

Calendar 3

Click on April.

Calendar 4

And select the 7th.

DOB 3

If the birth date is less than one year ago, the system auto-selects infant for our WIC Category.

For infants and children, we must select a gender.

Click the dropdown.

<no audio> Click the Gender dropdown.

Gender 1

Our only options are Female or Male. Select Female.

Scroll

There's nothing else to complete in these sections.

Click below the scroll bar.

Auth Rep 6

Remember how we said we'd come back to complete the Authorized Rep info?

Well, the fields in this section are disabled once a woman has been added to the household.

If no information is entered when mom's record is created, like what we did, her name is default populated.

If this information has already been completed for another during Presceen, or for an existing household member, the fields will again be disabled and auto-populate with the existing information.

Do you remember what must be completed with every Prescreen and how to complete it (just enough to get through the Prescreen)?

Go ahead. Click anywhere for a hint.

<audio – hint> The Initial Contact is required when Prescreening. Click the Initial Contact button.

Initial Contact 2

<audio – hint> To create the Initial Contact record, we simply click OK.

Finish Prescreen

Let's open Arya's folder.

Go ahead and finish the Prescreen. Click for a hint.

<audio – hint> Click the Save button.

Waiting

<screen description – no audio> Spin icon displays over Prescreen page.

Waiting

<screen description – no audio> Spin icon displays over Arya's Demographics page.

Open Folder

Let's verify Bea is part of this household also.

How would we do that within the folder?

Click anywhere for a hint.

Participant Menu

Yep. She should be listed in the Other Household Members section of the Participant Menu.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

We don't need to search for an existing record if the applicant indicates they've never participated in the MN WIC Program before.

Answer #1

The answer is False.

Applicants may not realize they already have a record or may not understand the question. Duplicate records also have a potential fraud component.

Therefore, even if the applicant indicates they haven't participated in the MN WIC Program before, we should still always perform a search before prescreening.

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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