

Prescreen 2 – WINNIE Online Training Module

APRIL 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It's a continued overview of Prescreening Applicants in WINNIE, the MN WIC Information System.

Date

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

Potential Duplicates

<Transition Slide>

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

Double-Check

We now know we should always double-check whether an applicant or one of their family members have received WIC benefits in MN by searching in Statewide before prescreening.

But it isn't failproof and sometimes, despite our best efforts, duplicate records are created.

WINNIE has the Potential Duplicate Participants function to help staff with the appropriate role identify and resolve duplicate records.

WINNIE also does a double-check when we save our prescreen to help us with our efforts to not to create a duplicate record.

Search

For instance, maybe we performed our statewide search but misheard her date of birth, so our search didn't find any matches.

Go ahead and click Create New Household on the sidebar. <no hint>

Prescreened 1

While completing the Prescreen page...

<page transitions to completed Prescreen>

Prescreened 2

...we entered her correct date of birth.

Click below the scroll bar.

Prescreened 3

Once the Prescreen page is saved, WINNIE does a quick database scan to see if any records exist that exactly match the last name, first name, and date of birth.

Click Save. <no hint>

Duplicates Modal

If WINNIE finds an exact match, the Potential Duplicate Applicant/Participant modal displays.

Our next step is to determine if this is the same person we just prescreened.

We could ask if the address was a previous address if it's different on the modal or see if the Auth Rep matches.

Or maybe just ask...are you sure? Or is it possible?

<screen description – no audio>

WIC Staff: Are you sure...?

Complete Prescreen

We click the Complete Prescreening button if we determine the applicant is a different person.

The system proceeds with the On Completion selection and assigns a Household and State WIC ID to the new participant.

Open Existing

We click the Open Existing Participant button if we are confident it is the same person.

The system ignores whatever was selected for On Completion and does not create a new record.

Click the Open Existing Participant button.

Open Existing 2

If any of the Demographic information including the physical address, mailing address, telephone numbers, telephone comments and/or email do not match those in the existing record, this message displays informing us it doesn't match and asking if we want to update it.

We can generally assume that any information provided today is correct and that the record should be updated.

Click the Yes button.

Mail Address Msg

The next message displays only if there is any change to the mailing address.

We will see this message again.

Essentially, it is telling us 3 things.

One, WINNIE will not automatically save the new mailing address.

Two, it will open the eWIC Households Demographics page first when the folder is opened.

Three, we must successfully communicate the change to the WIC Processor.

Click the OK button.

Waiting

<screen description – no audio> Spin icon displays. Page changes from Prescreen to Manage eWIC Account.

Transfer

We should note that if the existing participant currently belongs to another agency/clinic, the system will initiate the transfer process, which we'll see in the Transfer training modules.

However, in this instance, the existing record for Sallie belonged to the same agency and clinic, so it opened directly to the eWIC Household Demographics page as the message promised.

Send eWIC Data 1

The new mailing address displays but will not save until we click the Send eWIC Data button.

Go ahead and do that.

Waiting

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

Waiting

<screen description – no audio> Spin icon displays with “Working...please wait” message. Page displays message: “Status: Successfully updated EBA.”

Send eWIC Data 2

The Electronic Benefit Account, or EBA, was successfully updated, and our updated Mailing Address is now saved.

We should note that WINNIE will ensure we click the button if we try to navigate away from this page before doing so.

<Transition Slide>

<screen description – no audio> Slide transitions eWIC Household Demographics page to Topic page.

Add Member

<Transition Slide>

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

Add Mbr

There are two ways to add a new member to an existing household.

One is using the option, as we may recall seeing, in the Participant Menu within the folder.

Two is clicking the icon on the participant card in search.

Either method opens the Applicant Prescreen page.

<screen description – no audio>

WIC Staff: ...what can I do for you today?

WIC Participant: “My name is Terri Bull... They told me to call once I had my baby but I’m living in Hopkins now instead of St. Paul so...”

Scenario

We are going add Terri Bull’s baby to her household.

Since she used to live in St. Paul, we’ll look for her in Statewide.

Go ahead and get us started.

<audio – hint> Click the Statewide button.

<screen description – no audio>

WIC Staff: ...can you spell your name for me and tell me your birth date?

WIC Participant: “T-E-R-R-I B-U-L-L.”

“January 28, 2000.”

Search 1

We could use the Agency dropdown to narrow our search but let’s first just try entering her last name, first name and date of birth.

Go ahead. Click anywhere for a hint.

<audio – hint> Click into the Last Name field.

Search 2

<audio – hint> Type: Bull, B-U-L-L, then click into the Participant First Name field or press the Tab key.

Search 3

<audio – hint> Type: Terri, T-E-R-R-I, then click into the Date of Birth field or press the Tab key.

Search 4

<audio – hint> Type: 1/28/00 then press the Enter key or click the Search button.

<no audio> NOTE: If using the Tab key, it would usually require you to hit the Tab key twice. Once to move the cursor to the Participant MI field and again to move the cursor to the Participant Date of Birth field

Household Mbrs

How can we easily determine if there are any other household members? Go ahead.

Click for a hint.

<audio – hint> Click the Household ID link in the participant card.

Add Member Icon

Nope. No other members yet.

Let’s Add her baby. Click the Add New Member icon on the participant card.

Add LN

Her baby's name is Adora Bull, a little girl born on 4/5/23.

Use the calendar control to add the birth date. Go ahead.

Click anywhere for hints.

<audio – hint> Type: Bull, B-U-L-L, then click into the Participant First Name field or press the Tab key.

<screen description – no audio>

WIC Staff: ...and your baby's name and when she was born?

WIC Participant: "A-D-O-R-A B-U-L-L."
"January 28, 2000."

Add FN

<audio – hint> Type: Adora, A-D-O-R-A, then click the Calendar Control in the Date of Birth field.

<no audio> After typing the First Name, click the Calendar Control.

Add DOB

<audio – hint> Click 5 on the calendar.

Add Gender 1

<audio – hint> Click the Gender dropdown.

Add Gender 2

<audio – hint> Select Female.

New Address 1

Terri used to live in St. Paul and now lives in Hennepin county, so we need to update the household's addresses.

We're going to use some hot keys this time.

Go ahead and click three times in the Address field to highlight their current address.

<screen description – no audio>

WIC Staff: ...what can I do for you today?

WIC Participant: "...I'm living in Hopkins now instead of St. Paul so..."

New Address 2

<no audio> Click three times in the Address field.

New Address 3

<no audio> Click three times in the Address field.

New Address 2

Let's type their new address: 123 Any Road

New County 1

Since they now live in Hennepin, we need to first select our new county to get the correct list of cities.

Click the County dropdown. <no hint>

Hot Key 1

Let's use a hot key or a keyboard shortcut.

Hit the H key on the keyboard.

<no audio> Press the H key on the keyboard.

Hot Key 2

Hot keys automatically select the first option in the dropdown that begins with that letter.

Now when we click the City dropdown...

New City

...we have the right list. Select Hopkins.

New Zip Code 1

Click the Zip Code dropdown.

New Zip Code 2

Select 55343.

Same Mail

They receive their mail at the same address so go ahead and update that information.

<audio – hint> Click the Copy Physical Address button.

<screen description – no audio>

WIC Staff: ...is your mail sent to your new address?

WIC Participant: “Yep.”

Comment 1

Good practice is to double-check there isn’t anything else we should update.

For instance, telephone numbers and comments.

Maybe our agency likes to know whether we can leave messages so let’s add that comment.

Click into the Comment field for the first telephone number...

<no audio> Click into the Primary Telephone Comment field.

<screen description – no audio>

WIC Staff: Are these still the best numbers to contact you? We have 651-111-1111 and 952-111-1111.

WIC Participant: “Sure”

WIC Staff: Are you OK with us leaving messages at the 651 number?

WIC Participant: “Yes. That’s fine.”

Comment 2

...and type an abbreviated “message OK”, m-s-g OK.

<no audio> Type: Msg OK.

No Email

We also send appointment reminders and sometimes other information via email, but Terri isn’t interested in that, so we are moving on.

Click below the scroll bar.

<screen description – no audio>

WIC Staff: Are you interested in getting appointment reminders or other information by email?

WIC Participant: “Hmm. Not really. I prefer just to use the WIC App.”

Clinic

She is also OK with the clinic we are currently working in.

<screen description – no audio>

WIC Staff: We have a couple of different places you can go to for in-clinic visits...

WIC Participant: "I'm OK with where you suggested. I can always change it, right?"

IC 1

We are going to open Adora's folder, so what else must we do to complete our Prescreen?

Go ahead. Click anywhere for a hint.

<audio – hint> An Initial Contact record must be created with each Prescreen. Click the Initial Contact button.

IC2

<audio – hint> Click the OK button to create the Initial Contact record.

Save Prescreen

Go ahead and save the Prescreen.

<audio – hint> Click the Save button.

Mail Address Msg

We saw this message earlier when our mailing address changed.

Take a moment to read it, then click OK.

<audio – hint> Click the OK button.

Waiting

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

Waiting

<screen description – no audio> Spin icon displays with "Working...please wait" message. Page transitions to eWIC Household Demographics page.

Send eWIC Data 3

What must we do for the new mailing address to be saved? Go ahead.

<audio – hint> Click the Send eWIC Data button.

Waiting

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

Waiting

<screen description – no audio> Spin icon displays with “Working...please wait” message. Page displays message: “Status: Successfully updated EBA.”

Assigned Clinic 1

<screen description – no audio> Green banner that reads “Status: Successfully updated EBA.” highlighted.

We need to take a minute to talk about where our household member records are currently assigned.

Adora is assigned to Hennepin – South.

<Transition Slide>

But if we remember back to before we added Adora...

<screen description – no audio> Slide transitions from Manage eWIC Account page to Participant Search page with Terri’s participant card in the Search Results.

Assigned Clinic 2

...we found Terri in Statewide, and she belongs to St. Paul – Eastside.

<Transition Slide>

<screen description – no audio> Slide transitions from page Participant Search page to the Manage eWIC Account page.

Assigned Clinic 3

Let’s open the Participant Menu. Go ahead.

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

Assigned Clinic 4

Two reminders. We can also add a new member from within the participant folder using the Participant Menu.

And all members of a household regardless of where they belong and their status, except for children over 5, display in the Other Household Members list.

Go ahead and open Terri's folder.

<audio – hint> Select BULL, TERRI in the Participant Menu.

Transfer Msg 1

We've seen this message before but that time we clicked No.

The message tells us 3 things.

One. The household member for whom we're trying to open the folder doesn't belong to the agency we are currently working in.

Two. The member must be transferred to this agency before the folder can be opened.

Three. A reminder to update the addresses as appropriate (which we already did).

This time we're going to click Yes on the message.

<no audio> Click the Yes button.

Transfer Msg 2

We won't spend time reviewing the Transfer Participant(s) modal since one of our next training modules will focus on Transfers.

We'll just note that Adora is already in our South clinic and Terri is the member being transferred.

Click the OK button.

Transfer

Terri is now assigned to Hennepin – South.

However, because the clinic is also communicated to the WIC Processor, before we navigate away from this page, we must complete the transfer by clicking the Send eWIC Data button.

NOTE: We'll see in the Transfer module that the system has a reminder to click this button before allowing us to navigate from this page.

Go ahead and click the Send eWIC Data button.

Waiting

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

Waiting

<screen description – no audio> Spin icon displays with “Working...please wait” message. Page displays message: “Status: Successfully updated EBA.”

End Slide

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

WINNIE will display the Potential Duplicate Applicant/Participant modal if the applicant’s Last Name, First Name, and Date of Birth exactly match those of an existing participant.

Answer #1

The answer is True.

The modal displays if the existing record exactly matches the applicant’s last name, first name, and date of birth.

Multiple Choice Q#2 (single answer)

Multiple Choice – select the correct answer.

Which two things must be communicated to the WIC Processor if they change?

- A. Physical Address and Clinic
- B. Clinic and Email
- C. Physical Address and Mailing Address
- D. Clinic and Mailing Address
- E. Email and Physical Address

Answer #2

The answer is D.

If either the participant’s Clinic or their Mailing Address change, these changes must be communicated to the WIC Processor.

The system will ensure the user clicks the Send eWIC Data button in both of these circumstances.

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.

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