

VOCs 2B – Documentation Requirements – WINNIE Online Training Module

FEBRUARY 2024 (REV. 5/24)

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It provides an overview of how to complete documentation requirements for existing MN WIC participants who are VOC certified in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being February 13, 2024.

<Transition Slide>

<screen description – no audio> Slide transitions to the Manage eWIC Account page for Polly Ester.

Scenario 1

In this module, we are continuing to work with Polly Ester and her sons, Terry and Wash Clauth. In the last module, we completed updating their address and assigning a card, as well as VOC certifying all three of them.

We have VOC Documents from Maine that can be used as proof of identity for the children and Polly also brought her social security card.

She forgot to bring anything with proof of her address.

PARTICIPANT: "I'm pregnant and we all just had appointments in Maine before we moved back. They gave me these papers as proof."

PARTICIPANT: "When I called WIC to make this appointment, she told me I needed to bring ID for me and proof of my new address. I have my social security card but forgot anything with my address on it."

Document Proofs 1

Let's begin by documenting the proofs, which is required just like any other certification.

We can document proofs for VOCs in the Proofs modal since a VOC is a new certification record and for existing participants, any previous proofs associated with their last cert clears when they are VOC certified.

Remember, if the parent/guardian is not participating in WIC, they must show proof of ID and we must document their name in the appropriate Representative field.

Go ahead and open the Proofs modal. Click anywhere for a hint.

<no audio> Click the Participant Menu.

Document Proofs 2

<no audio> Open the Proofs modal. Click anywhere for a hint.

<audio – hint> Select Proofs.

Document Proofs 3

Select the appropriate proofs from the dropdowns then save.

Displays on Slides: Document Proofs 3-7

<screen description – no audio> “When I called WIC to make this appointment, she told me I needed to bring ID for me and proof of my new address. I have my social security card but forgot anything with my address on it.”

<audio – hint> Click the Proof of Residence dropdown.

Document Proofs 4

<no audio> Complete the Proof of Residence and Identification then Save.

<audio – hint> She can provide proof but not today. Select PENDING PROOF.

Document Proofs 5

<no audio> Complete the Proof of Residence and Identification then Save.

<audio – hint> Click the Proof of Identification dropdown.

Document Proofs 6

<no audio> Complete the Proof of Residence and Identification then Save.

<audio – hint> Select Social Security Card.

Document Proofs 7

<no audio> Complete the Proof of Residence and Identification then Save.

<audio - hint> Click the Save button.

Document Proofs 8

We have VOC Documents for Terry and Wash.

Go ahead and complete the Proofs for Terry then Wash. Click anywhere for a hint.

<audio – hint> Click the Participant Menu.

Document Proofs 9

<no audio> Complete the Proofs for Terry then Wash. Click anywhere for a hint.

<audio – hint> Select Clauth, Terry from the Other Household Members list.

Document Proofs 10

<no audio> Complete the Proofs for Terry then Wash. Click anywhere for a hint.

<audio – hint> Click the Participant Menu.

Document Proofs 11

<no audio> Complete the Proofs for Terry then Wash. Click anywhere for a hint.

<audio – hint> Select Proofs.

Document Proofs 12

<screen description – no audio> Household-level displays in Proof of Residence field.

<no audio> Complete the Proofs for Terry then Wash. Click anywhere for a hint.

<audio – hint> Click the Proof of Identification dropdown.

Document Proofs 13

<no audio> Complete the Proofs for Terry then Wash. Click anywhere for a hint.

<audio – hint> Select Out-of-State Transfer.

Document Proofs 14

<no audio> Complete the Proofs for Terry then Wash. Click anywhere for a hint.

<audio – hint> Click the Save button.

Document Proofs 15

<no audio> Complete the Proofs for Terry then Wash. Click anywhere for a hint.

<audio – hint> Click the Participant Menu.

Document Proofs 16

<no audio> Complete the Proofs for Terry then Wash. Click anywhere for a hint.

<audio – hint> Select Clauth, Wash from the Other Household Members list.

Document Proofs 17

<no audio> Complete the Proofs for Terry then Wash. Click anywhere for a hint.

<audio – hint> Click the Participant Menu.

Document Proofs 18

<no audio> Complete the Proofs for Terry then Wash. Click anywhere for a hint.

<audio – hint> Select Proofs.

Document Proofs 19

<no audio> Complete the Proofs for Terry then Wash. Click anywhere for a hint.

<audio – hint> Click the Proof of Identification dropdown.

Document Proofs 20

<no audio> Complete the Proofs for Terry then Wash. Click anywhere for a hint.

<audio – hint> Select Out-of-State Transfer.

Document Proofs 21

<no audio> Complete the Proofs for Terry then Wash. Click anywhere for a hint.

<audio – hint> Click the Save button.

Scan VOC 1

As always, we should follow our agency's guidance about how to document transfer information, whether using a General Note or by scanning or importing the VOC documents.

Today, we have a scanner attached to our computer, so we're going to scan their VOC documents into their folders to meet the requirements to document the source of the transfer, as well as anything that would assist with continuity of care.

Where do we go to scan documents? Click anywhere for a hint.

<audio – hint> Select Document Imaging from the sidebar.

Scan VOC 2

Our SWIPE is on.

Click the Scan button.

Scan VOC 3

We've turned on our scanner and inserted Wash's VOC doc writing side down and title first into it.

Click the Scan button.

Scan VOC 4

Click the Document Type dropdown.

Scan VOC 5

We don't have a type specific to transfers, but a VOC is a certification, so let's select Cert Info/Nutrition Education for our Document Type.

Go ahead and select it.

Select Cert Info/Nutrition Education.

Scan VOC 6

Our free-form description is going to simply be VOC.

Click into the Description field and type VOC.

Scan VOC 7

<no audio> Click into the Description field and type VOC.

Scan VOC 8

And save.

<no audio> Click the Save button.

<Waiting>

<screen description – no audio> Working...please wait and spin icon display.

Scan VOC 9

Let's do the same for Terry then Polly. Click anywhere for hints.

Displays on Slides: Scan VOC 9 – 26:

<no audio> Scan the VOC documents for Terry then Polly. Click anywhere for hints.

<audio – hint> Click the Participant Menu.

Scan VOC 10

<audio – hint> Select Clauth, Terry from the Other Household Members list.

Scan VOC 11

audio – hint> Click the Scan button.

Scan VOC 12

<screen description – no audio> Checkmark displays on document being inserted into scanner.

<audio – hint> Click the Scan button.

Scan VOC 13

<audio – hint> Click the Document Type dropdown.

Scan VOC 14

<audio – hint> Select Cert Info/Nutrition Education.

Scan VOC 15

<audio – hint> Click into the Description field.

Scan VOC 16

<audio - hint> Type VOC.

Scan VOC 17

<audio – hint> Click the Save button.

<Waiting>

<screen description – no audio> Working...please wait and spin icon display.

Scan VOC 18

<audio – hint> Click the Participant Menu.

Scan VOC 19

<audio – hint> Select Ester, Polly from the Other Household Members list.

Scan VOC 20

<audio – hint> Click the Scan button.

Scan VOC 21

<screen description – no audio> Checkmark displays on document being inserted into scanner.

<audio – hint> Click the Scan button.

Scan VOC 22

<audio – hint> Click the Document Type dropdown.

Scan VOC 23

<audio – hint> Select Cert Info/Nutrition Education.

Scan VOC 24

<audio – hint> Click into the Description field.

Scan VOC 25

<audio - hint> Type VOC.

Scan VOC 26

<audio – hint> Click the Save button.

<Waiting>

<screen description – no audio> Working...please wait and spin icon display.

VOC Scan 27

We've completed the required documentation for proofs and our VOC source.

As a reminder, once we are done with the hard copy VOC documents, since they have private information on them, we need to make sure to destroy them.

Conclusion

In the next module, we will complete the rest of the tasks associated with a VOC.

Click the button to continue.

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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