

VOC Transfers

Introduction

This HuBERT on-demand training module is provided by the MN Department of Health WIC Program.

VOC Transfers

It provides an overview of VOC transfers.

VOCs

VOCs

VOC transfers occur when a participant currently certified by WIC in another state transfers to the MN WIC Program.

These transfers are called VOCs because we use the Verification of Certification (VOC) document provided by the other state as proof that the participant is in a current and valid certification period.

There are two ways to perform VOCs.

If the participant has never been on MN WIC before, we would perform the VOC during the Prescreen.

If the participant has been on MN WIC before, we perform the VOC within the Participant Folder.

VOCs (Prescreen)

VOCNewHH

We'll start by taking a look at participants who have never been on WIC in MN before.

Today's date is 9/3/15.

The Feat family have never lived in MN before. Mom, baby and child are currently certified for the WIC Program in the state they moved from.

They don't have appointments but mom has VOC documents for all of them and we can make time to do the walk-in appointments.

Since they've never lived in MN, it's safe to assume they don't have any records in our statewide database. Let's create a new household; click the house icon.

VOCP1

We're going to prescreen the child, Clay, first.

VOCPRequired

We've completed the required fields so that we can focus on the VOC.

The **Applicant Has VOC Document** checkbox allows us to indicate two things: the participant is in a current certification in another state's WIC program and that they have the required documentation available as proof.

Before we click the checkbox, notice that the **Initial Contact** button is enabled.

Now, once we click the VOC checkbox (go ahead)...

VOCCertified

...it is disabled. An Initial Contact is required during Prescreen but once the VOC checkbox is selected, it becomes part of the VOC process.

The **Certification End Date**, however, is now enabled so that we can enter the last date of the participant's current certification period.

Clay and his family, according to the VOC documents, were all certified on June 23, 2015, which is their Cert **Start** Date and we need their Cert End Date.

In most instances, HuBERT calculates the Cert End Date for us. The VOC is the exception, which means we need to be familiar with the certification periods for different WIC categories.

VOC2

In MN WIC, we always extend the Cert End Date to the last date of the month in which the participant's cert would typically end.

HuBERT validates the Certification End Date to ensure the length of the cert is appropriate based on the WIC category.

Infant's Certification End Dates are the last date of the month the infant turns one year old if certified before 6 months old.

If certified after 6 months of age the infant is only certified for 6 months. We can calculate their Cert End Date by adding 6 months to their Cert Start Date and extending it to the last date of that month.

VOC3

For children, we add one year to their Cert Start Date and extend it to the last date of that month.

If they are turning 5 years old, their Cert End Date must be the last date of the month they turn 5 years old.

For Pregnant women, we add 6 weeks to their Expected Delivery Date and extend the cert to the last date of that month.

For Fully, Mostly and Some-Breastfeeding women, we add 1 year to their Delivery Date and extend the cert to the last date of that month.

Lastly, for Non-Breastfeeding women, we calculate the Cert End Date by adding 6 months to their Delivery Date and extending the cert to the last date of that month.

CertEnd

Since Clay is a child, his certification is good for one year.

If his Cert Start Date is 6/23/15, what is his Cert End Date?

Go ahead and type the date into the field. Then click the **Add Another Household Member** radio button so that we can prescreen another member of his family once we've completed Clay's VOC.

VOCPan

Click the **OK** button to initiate the next step of the VOC.

<wait for pan>

VOCOK

<no script>

VOCCert

The **VOC Certification** dialogue completes the VOC process.

The enabled fields vary depending on the WIC Category of the participant.

For all participants, the **Priority** isn't required but it should be entered if provided on the VOC document.

Priority

The priority is usually assigned by HuBERT at the end of a certification and is based on a participant's WIC Category and risk factors.

The priority is necessary in case a waiting list were ever implemented.

Priorities are also submitted as part of Federal reporting.

More information about priorities can be found in the MN Operations Manual, Exhibit 5-U.

Click the **Continue** button when ready to continue with the module.

Priority1

The Priority is displayed at the bottom of the Demographics AdditionalInfo2 tab.

VOCert1

Clay's VOC indicates his priority is 5. Enter 5 into the field and click the **Initial Contact** button.

InitialContact

Remember, the Initial Contact helps us track the amount of time between a participant's application date and the date a first appointment is offered.

Although HuBERT requires the Initial Contact as part of Prescreen and VOCs, MN policy only requires the **First Appointment Offered Date** if there is a gap between certification periods.

In this case, there isn't a gap. However, because the Feat family walked in, It is our responsibility to change the **Type to Walk-in** so that the Initial Contact record accurately reflects the contact type.

Select **Walk-in** from the **Type** drop-down.

SelectWalkin

<no script>

WalkinHighlit

<no script>

InitialOK

Click OK.

VOCertOK

We are also done with Clay's VOC. Click OK.

VOCWait

<no script>

VOCMom

Next, we'll prescreen mom...

VOCMom1

What's our next step for a VOC? Go ahead.

VOCMom2

We know that Ma is breastfeeding her baby who was born on 5/20/15. Like Clay, she was certified on 6/23/15. So, what is Ma's Cert End Date?

Type the end date into the field. Then click the **Add Another Household Member** radio button so that we can prescreen the baby once we've completed mom's VOC. Lastly, click **OK** to complete the Prescreen.

VOCMomAdd

In order to complete the VOC, we need to select Ma's **Breastfeeding Amount**.

Type **5/20/15** into the **Actual Delivery Date** field then click the **Breastfeeding Amount** drop-down.

VOCMomBFamt

During some general discussion about how breastfeeding is going Ma told us that she isn't using formula, which means she is fully-breastfeeding.

It's not always that easy to figure out the Breastfeeding Amount at this juncture of the appointment.

However, keep in mind that, if necessary, we can always change our selection once we open the participant folder and complete the Health Information.

Go ahead and select her **Breastfeeding Amount**.

VOCMomHight

<no script>

VOCMomCert1

Click in, or Tab to, the **Priority** field

VOCMomPriority

Ma's VOC document indicates her priority is 1. Go ahead and type 1 then click the Initial Contact button.

VOCMomInitial

What change do we need to make? Go ahead. Click OK when finished.

VOCMomInitial1

<no script>

VOCMomInitial2

<no script>

VOCMomInitial3

<no script>

VOCMomDone

Click **OK** to complete Ma's VOC.

VOCMomWait

<no script>

VOCWait2

<no script>

VOCBaby

Lastly, we'll prescreen baby Dee.

VOCBaby1

What's our next step for a VOC? Go ahead.

VOCBaby2

Dee was born on 5/20/15 and like both Ma and Clay, she was certified on 6/23/15. What is her Cert End Date?

This time, since we've completed the VOCs for all members of the household, we are going to leave the **On Completion** radio button as is. So enter Dee's **Cert End Date** and then click **OK**.

VOCBabyBFamt

Like mom, we need to select Dee's breastfeeding amount. Click the drop-down.

VOCFBF

The breastfeeding amount is required for all infants. Notice that the infant's list includes Non-Breastfeeding as well.

Select Dee's breastfeeding amount.

VOCBFHight

<no script>

VOCBabyPriority

Click in, or Tab to, the **Priority** field.

VOCBabyPriority1

Dee's priority, according to her VOC, is also 1. Type **1** then click the **Initial Contact** button.

VOCBabyInitial

We're just going to quickly complete this one.

VOCBabyInitial1

Click **OK**.

VOCPptList

<no script>

VOCPptList1

Since we are opening Dee's folder, the CPA Review alerts automatically display. Read the alert then click **Close** or hit the Enter key.

VOCPF

Although technically the VOC has been completed, we are also responsible for completing information within the Participant Folder.

VOCHI

Click the **Health Information** tab.

This includes completing the Health History information and creating the link between mom and baby's records.

Click the **Risk Factors** tab.

VOCRF

HuBERT automatically assigns **Risk Factor 502 - Transfer of Certification** when VOCs are performed.

However, we should also assign any other risk factors listed in the VOC document.

Click the Food Prescription tab.

VOCPF

And, of course, we also need to create a tailored food package.

Other things we might need to do to complete the VOC is to provide nutrition education, schedule future appointments, and issue benefits.

VOCs (Participant Folder)

VOConBefore

We can also perform a VOC for a participant who has been on MN WIC before but whose most recent certification was performed by another state.

Sunny Day was on MN WIC when her first baby was born. Her family moved to Texas, she became pregnant again and was certified there, and has now moved back to MN.

She called to make an appointment and brought her Texas transfer document with her. Today is 3/12/19.

VOConBefore1

When Sunny came in for her appointment she told us she had been on WIC before in MN so we looked her up in the Statewide database using her last name and birth date.

She currently belongs to Agency and Clinic 88, which means we'll have to transfer her to our agency and clinic. Go ahead and do this.

<no audio – hint after 7 seconds> To initiate the transfer, we must open Sunny's participant folder. Double-click the row in the Participant List or click the Open Participant Folder icon.

VOCb4Xfer

<no audio – failure hint> Click the **Yes** button.

VOCb4Xfer1

<no audio – failure hint> Click the **OK** button or press the Enter key.

VOCb4Xfer2

<no audio – failure hint> Click the **OK** button or press the Enter key

VOCb4HHDemo

<no audio – EBT Household Demographics screen opens>

VOCb4HHDemo1

<no audio – failure hint> Click the **Send EBT Data** button or press the Enter key

VOCb4HHDemo2

<no audio – failure hint> Click the **OK** button or press the Enter key

OpenPFWait

<no audio – screen returns to Participant List before opening Participant Folder>

VOCb4Address

As the first transfer message reminded us, we need to update Sunny’s address. We’ll quickly do that...

VOCb4Address1

Now that Sunny’s address is current and her existing record has been transferred into our clinic we can perform the VOC.

Since the VOC is a form of certification, which menu should we expect to find the VOC option under? Go ahead and open the VOC Certification.

<no audio – failure hint> Click the **Certification** menu.

VOCb4CertMenu

<no audio – failure hint> Select **VOC Certification**.

VOCb4SaveMsg

We should always click Yes whenever we see this message in the Participant Folder. It’s indicating that a change has been made that should be saved.

<no audio> Click the **Yes** button or press the Enter key.

VOCb4WICCat

The same VOC Certification dialogue opens.

Sunny was a Non-Breastfeeding woman the last time she was certified for MN WIC, which is why that is the category default.

Whenever the WIC Category is postpartum, the question “Were you on WIC in this state during the pregnancy related to this postpartum certification?” is enabled.

It’s asking if she was on MN WIC for her most current pregnancy.

If Yes, HuBERT would automatically link the most recent pregnancy record it has with the postpartum cert record we are creating with this VOC.

But, Sunny isn't postpartum, she's pregnant. So let's correct that.

<no audio> Click the **WIC Category** drop-down.

VOCb4WICCat1

<no audio> Select **Pregnant**.

VOCb4EDC

We need the Expected Delivery date to be able to calculate the Cert End Date.

We can enter either the Expected Delivery or LMP Start Date and HuBERT will automatically calculate the other for us.

Sunny knows her due date, which is 7/10/19. So let's enter this first.

<no audio> Click into the **Expected Delivery** field.

VOCb4EDC1

<no audio> Enter 7/10/19 into the **Expected Delivery** field and press the **Tab** key on the keyboard.

VOCb4CertEnd

Now we can calculate her Cert End Date.

7/10 + 6 weeks until the end of the month. So August 31st. Let's enter that.

<no audio> Click into the **Certification End Date** field.

VOCb4CertEnd1

<no audio> Enter **8/31/19** into the **Certification End Date** field and click into the **Priority** field.

VOCb4Priority

According to her VOC document, her priority is 1. Type this and click the Initial Contact button.

VOCb4IC

Since Sunny called to make her appointment, there isn't anything we need to do in this screen except click OK.

<no audio> Click the **OK** button or press the Enter key.

VOCb4Done

And click OK to save the VOC.

<no audio> Click the **OK** button.

VOCb4RF

If we click the Risk Factors tab...

<no audio> Click the **Risk Factors** tab.

VOCb4RF1

We can see that Risk Factor 502 – Transfer of Certification has been assigned.

Again, to complete Sunny’s VOC, we would want to: assign any risk factors indicated in the VOC document, complete Health Information, create an appropriate tailored food package, provided nutrition education as required, and set Primary Cardholder, assign the WIC Card and issue benefits.

Produce VOC Document

VOC Doc

We can print a VOC document when needed, such as if a participant informs us they are moving out-of-state, or if another state’s WIC Program calls needing VOC information because one of our participants has moved to their state.

We can print up to 5 VOC documents per participant.

VOC Doc Open PF

Adora Bull has informed us that she is moving to Wisconsin so we need to print a VOC document for her. Go ahead and open her Participant Folder.

<no audio – hit after 7 seconds> Double-click the row in the Participant List or click the Open Participant Folder icon.

VOC Doc Menu

The option to produce a VOC document is in the Participant Activities menu.

<no audio> Click on **Participant Activities** in the menu bar.

VOC Doc Menu1

<no audio> Select **Produce VOC Document**.

VOC Doc Term

Although we have the option to terminate a participant when they transfer to another state, we **don’t** do this in MN WIC.

So, all we have to do is click OK and the VOC document will be sent immediately to the printer.

<no audio> Click the **OK** button or press the Enter key.

VOC Doc Printed

We need to always keep in mind that this document contains private data that should not be shared with others outside of WIC.

It should never be left, whether on a printer, in the fax machine or on our desk, where others might be able to inadvertently view it.

That said, it provides information about the most recent certification, including: the date the income was determined, the start and end dates, their category and priority, the most recent blood work information, the most recent height and weight measurements, the most recently assigned risk factors and if high risk is indicated...

VOC Doc Printed1

...a list of the last sets of benefits issued and lastly, agency contact information.

Since this is an official transfer document, we should print our name and sign it.

And if providing directly to the participant, or authorized rep, they should also sign.

End

End

Thank you for reviewing this HuBERT on-demand training module presented by the MN Department of Health WIC Program.