

Certification 1A - WINNIE Online Training Module

SEPTEMBER 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It provides an overview of certification in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being September 5, 2023.

Overview 1

Certification is the process of assessing eligibility and enrolling or re-enrolling applicants and participants into the WIC Program.

Whether new or existing, the certification process is the same.

Recertification is a term that is often used for subsequent certifications of existing participants.

In these modules, however, we'll refer to all certifications as a certification or cert.

Overview 2

Mid-certification Assessments, often referred to as MCAs or Midcerts, are nutrition assessment appointments required for participants certified for more than 6 months.

Certs and MCAs share some general functionality in WINNIE.

However, specific information about MCAs will be covered in another training module.

<Transition Slide>

<screen description – no audio> Slide transitions from topic slide to Sallie Mander's Demographics page.

New Participant 1

Sallie Mander and her infant, Geri, were recently prescreened.

<Transition Slide>

<screen description – no audio> Slide transitions from Demographics to Manage Notes page.

SOD 1

Our co-worker reviewed and verified their adjunctive income status a couple of days ago, and entered an SOD-Income Note to meet Separation of Duties requirements, instead of starting the certification early and entering it for the cert.

Our agency does this since best practice is to always start the certification on the same date as it is completed.

<Transition Slide>

<screen description – no audio> Slide transitions from Manage Notes to topic page.

Cert Dates 1

When a certification is started, there are two dates associated: the Cert Start Date and Cert Effective Date.

The Cert Effective is the date the cert was completed.

Due to how changes to a participant's risk assessment are stored in the database, we currently (and admittedly not ideally) use the criterion that Cert Start Date is equal to Cert Effective Date to identify an actual certification.

All ad-hoc Infoview reports that identify certs currently use this criteria.

Cert Dates 2

If we don't start and complete the cert on the same date, any reports that pull certification information will not recognize our certification.

<Transition Slide>

Returning to Sallie...

<screen description – no audio> Slide transitions from topic page to Manage eWIC Accounts page.

eWIC Account 1

The only other thing we've completed so far is the Manage eWIC Account information.

Next, we are going to certify her.

Not in Cert 1

For participants that are not in a current certification, whether new or existing, pages in the Participant Folder where records can be added that are usually associated with certifications are disabled.

These include Bloodwork, Food Prescription, Health Information, Income, Length/Height/Weight, Nutrition Assessment, Nutrition Education, Referrals, and Risk Factors.

Go ahead and select Income from the sidebar to see what this means.

<Waiting>

<screen description – no audio> Spin icon displays.

Not in Cert 2

Since the Add button is disabled, and we verified income prior to the cert and are following best practices, we had to create the SOD-Income Note.

All the other pages that allow us to document or view records are still enabled.

For instance, select Peer Counselor Contacts from the sidebar.

Not In Cert 3

Since the Add button is enabled, we could add a peer counselor contact even the participant isn't currently certified.

Begin Cert 1

The Certification/MCA section is located at the very bottom of the sidebar.

Due to the size of this training module, we will need to click the tiny scrollbar inside the red box.

Begin Cert 2

This is how the cert and MCA share functionality.

Depending on whether a cert or MCA is due, the appropriate mode will open.

To start a cert or MCA, we select Begin Certification on the sidebar.

Go ahead and do that.

<Transition Slide>

<screen description – no audio> Slide transitions from Begin Certification modal to "Are you sure?" message.

We're going to take a look at the Begin Certification modal in a minute, but first...

Confirm Msg 1

...for infants and children, and women who are certified on the same date as they are prescreened, a Confirm message displays that simply asks if we are sure we want to start a cert.

Clicking the Yes button begins the Certification Mode.

In this instance, women are automatically certified as the WIC Category selected during Prescreen.

<Transition Slide>

<screen description – no audio> Slide transitions from “Are you sure?” message to Begin Certification modal.

Begin Cert Modal 1

For women who are not immediately certified on the same date as being prescreened, like Sallie, the Begin Certification modal displays.

Begin Cert Modal 1A

It has two questions.

First <HEARTBEAT – start at 3 sec?>, which category are we certifying her for?

Sallie is breastfeeding.

Go ahead and click the dropdown and select her WIC Category.

Begin Cert Modal 2

<no audio> Click the dropdown and select her WIC Category.

Begin Cert Modal 3

The second question becomes active only once we select a postpartum option.

This question asks whether the participant was active in **our WIC Program** during her most recent pregnancy.

Its purpose is to link the most recent pregnancy record to the new postpartum record.

Since we just prescreened Sallie, our answer is No.

Select Yes 1

However, if we select Yes and click Continue, WINNIE performs a quick verification to <SPIN SLIDE>, first, ensure a pregnancy record actually exists <NO PREG MSG SLIDE>.

If one doesn't, it displays a message indicating this.

Select Yes 2

If a pregnancy record **does** exist...

<screen description – no audio> X on Information message, slide transitions to time period message.

Select Yes 3

...it performs a second verification to ensure that the Expected Delivery Date for that pregnancy record is 58 or fewer weeks ago for breastfeeding women and 32 or fewer weeks for non-breastfeeding women.

Select Yes 4

Notice these are Information messages.

If we get a message, we continue to Certification Mode, but unlike if our pregnancy record meets the requirements, it will not create a link between the most recent pregnancy record and this new postpartum record.

<Transition Slide>

<screen description – no audio> Slide transitions from Information message to Begin Certification modal.

Begin Cert Modal 4

OK. Back to our Begin Certification Modal where we going to correctly click the No button, then click Continue.

<no audio> Click the No button then click the Continue button.

Begin Cert Modal 5

<no audio> Click the No button then click the Continue button.

<Waiting>

<screen description – no audio> Spin icon displays.

<Transition Slide>

Let's go back and take a look at starting certifications for existing participants.

<screen description – no audio> Slide transitions from Certification Mode >> Demographics page back to Participant Search page.

Existing Participants 1

In general, we want to certify existing participants during the month their cert ends.

Although it can be helpful to sync household members to the same appointment schedules, it isn't a requirement, and efforts to do this must fall within the system's guidelines, which were established to coincide with Federal Regulations and WIC policy.

Terminating current certifications for the purpose of syncing household members is not an approved practice.

Existing Participants 2

The system provides validations to ensure certifications are not started too early.

For infants, who should be certified after turning one as a child, a new certification can be started within 30 days before their first birth date, but this should only occur if absolutely necessary.

Let's take a look at the other messages that display before starting a certification.

We need to take note of two things: Summer Raine's cert does not end until October 31st and she had a Midcert due in April, but it hasn't been completed.

Go ahead and double-click on her card to open her folder.

<no audio> Double-click Summer's card to open her folder.

<Waiting>

<screen description – no audio> Spin icon displays.

Existing Participants 3

Let's Collapse the Clinic Actions section to access our Certification/MCA section then start a cert.

<no audio> Collapse the Clinic Actions section on the sidebar and start a certification.

Existing Participants 4

<no audio> Collapse the Clinic Actions section on the sidebar and start a certification.

Existing Ppt Msg 1

If a woman, infant or child has a Midcert Due Date and it hasn't been completed prior to beginning a new certification, or they aren't eligible for either, the system doesn't know which mode to enter, cert or MCA.

So, the first message it may display is the Certification Type message so that we can select what we want to begin.

We are attempting to start a cert.

Click the Certification button then click the Continue button.

Existing Ppt Msg 2

<no audio> Click the Continue button.

Existing Ppt Msg 3

The next, or another, message that may display informs us there are benefits that can still be issued for the current certification period.

Since MN WIC allows the system to suggest the last set of benefits that can be issued during a cert period, those with a Printed First Date to Use, or PFDTU, in the month the cert ends, we will often see this particular message.

It will display as long as the PFDTU for the participant's benefit cycle is the current date or in the future.

Since we can issue these benefits after certifying, we would typically click Yes on this message.

Existing Ppt Msg 4

Once it's considered late issuance because the PFDTU is in the past, this message won't display, but another message at the end of the certification will allow us to issue those late benefits, which we'll see in another module.

Go ahead and click Yes to continue.

Existing Ppt Msg 5

The next message we may see, when starting a cert for a child, is the Error message informing us that we cannot begin a new certification until it's within 45 days of their Cert End Date (or 30 days if an infant).

There is no date validation for women; a new cert can be started at any time.

Our only choice is to click OK, which will cancel the begin cert process.

<Transition Slide>

There is one last message we may see.

<screen description – no audio> Slides transitions from Summer Raine’s Demographics page to Anne Teaque’s Demographics page.

Existing Ppt Msg 6

If an existing infant or child, such as Anne Teaque, has a completed MCA and their Cert End Date is within 30 or 45 days, respectively...

<Transition Slide>

There is one last message we may see, which we’ve seen before...

<screen description – no audio> Slides transitions from Search screen to Anne Teaque’s Demographics page displaying the cert Confirm message.

Existing Ppt Msg 7

...a Confirm message to ensure we meant to begin a certification.

We’ll continue our review of Certification in the next training module.

<Transition Slide>

Let’s return to Sallie Mander for whom we first started the Certification Mode.

<screen description – no audio> Slide transitions to Sallie Manders’ Cert Mode – Demographics page.

End Slide

We’ll continue our overview of Certification in the next training module.

<Transition Slide>

<screen description – no audio> Slide transitions to Test Your Knowledge slide.

Test Your Knowledge

True/False Q#1

We can create notes, alerts, scan/import documents, assign WIC Cards, and document peer counselor contacts when participants are not in a current certification.

Answer #1

The answer is True.

Only pages in the Participant Folder where records can be added that are usually associated with certifications are **disabled**, such as height/weight and blood, income, and health information (to name a few), when participants are not in a current cert.

We can still create notes, alerts, scan/import documents, manage eWIC accounts, and document peer counselor contacts.

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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